

HISTORY OF EDUCATION & CHILDREN'S LITERATURE

X/1 2015

eum

Al prof. Giorgio Chiosso dell'Università degli Studi di Torino, studioso tra i più brillanti e raffinati della storia dell'educazione e della scuola nell'Italia dell'Otto e del Novecento e maestro di diverse generazioni di ricercatori, in occasione dei suoi settant'anni.

To the Professor Giorgio Chiosso of the University of Turin, one of the most brilliant and refined scholars of the history of education and of Italian schools in the nineteenth and twentieth century and teacher of several generations of researchers, on the occasion of his seventy years.

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Contents

Indice

9 *This issue*

The role of scientific journals in the development and internationalization of historical-educational research

edited by
Roberto Sani

- 13 Carlos Eduardo Vieira, José Gonçalves Gondra
 «Revista Brasileira de História da Educação»: trajetória e os desafios da internacionalização (2001-2014)
- 23 Eckhardt Fuchs, Rebekka Horlacher, Jürgen Oelkers,
 Daniel Tröhler
 Challenging national boundaries in the history of education. An outline of the journal «Bildungsgeschichte: International Journal for the Historiography of Education» (IJHE)
- 29 Décio Gatti Júnior
 The role and current challenges of the Brazilian periodical «Cadernos de História da Educação» in scientific publishing in the history of education in the twenty-first century
- 39 José Luis Hernández Huerta, Antonella Cagnolati
 En la Historia de la Educación. La gestión editorial, las revistas de Historia de la Educación y «Espacio, Tiempo y Educación»

- 57 Maria Helena Camara Bastos, Claudemir de Quadros,
Maria Stephanou
Revista «História da Educação» da ASPHE/RS (Brasil):
compartilhando estudos e pesquisas desde 1997
- 65 Marta Ruiz-Corbella, Arturo Galán, Alfonso Diestro
Las revistas científicas en educación ante la exigencia de la
sociedad en red
- 73 Antonio Viñao Frago
Revistas científicas e historia de la educación: una reflexión
personal
- 89 Roberto Sani
«History of Education & Children's Literature» and the
internationalization of historical-educational research in
Italy (2006-2014)

*Nineteenth- and twentieth-century schools as a laboratory for the
promotion of national identity and citizenship education / Part One*
Call for Papers for the 10th anniversary of the journal «History of
Education & Children's Literature» (2006-2015)

edited by
Roberto Sani

- 99 Ingrid Brühwiler
Citizenship education in Switzerland before, during and
after the First World War
- 121 Ina Katharina Uphoff
The construction of *Heimat* on German wallcharts in
the early 20th century, and the part it played in creating a
national identity
- 139 Elaine Cátia Falcade Maschio
Celebrating *Italianità*: the teaching of the Italian language
and culture in ethnic schools in Paraná, Brazil
- 155 Ramona Caramelea
A school subject serving the nation. Geography textbooks
in Romania (1864-1945)

- 177 Alla Salnikova, Zhanna Khamitova
School architecture as a way of promotion of Soviet identity in the 1930s' Stalinist Russia
- 195 Lucia Wanjiku
19th and 20th-century school as a laboratory for national identity and citizenship education: the case of Uganda
- 215 Paulí Dávila, Iñaki Zabaleta, Joxe Garmendia
The construction of the Basque Fatherland: religion, nationalism and education (1895-1931)
- 235 Adriana Kičková, Mária Kiššová
Czechoslovak identity and history course books in the Czechoslovak Republic (1918-1939)
- 251 Tomáš Kasper, Dana Kasperová
National, state and civic education in the Czech lands of the Austro-Hungarian Empire, and, after 1918, in Czechoslovakia
- 279 Anna Ascenzi, Roberto Sani
The teaching of Rights and Duties in the schools of united Italy: between ideological control, social discipline and citizenship education (1861-1900).
Part One
- 299 Cecilia Axell, Jonas Hallström
Technology and the shaping of a Swedish national identity in the educational work of Selma Lagerlöf, 1900-1907
- 317 Blanka Kudláčová
National character of the Educational Reform Movement in Slovakia in the interwar period
- 339 Joaquim Pintassilgo, Carlos Manique da Silva
School military education and the construction of a national identity in Portugal in the passage from the 19th to the 20th Century
- 361 Xavier Tornafoch Yuste, Isavena Opisso Atienza
National identity, civic values and school textbooks in Spain: *La Enciclopedia cíclico-pedagógica* and *El libro de España* (1931-1957)

- 369 Evelina Scaglia
The *Regents' System* of Marco Agosti between Fascism and democracy
- 393 Guillemette Tison
French pupils between the two wars of 1870-1871 and 1914-1918. Reading books and their patriotic consciousness
- 411 Eliane Mimesse Prado
Obstacles to teaching the Portuguese language in elementary schools in the city of São Paulo (Brazil) in the early 20th century
- 427 Vučina Zorić
Fundamentals of John Dewey's concept of civic education
- 447 Mirella D'Ascenzo
Nation building in the school prize giving ceremonies of the first decades after Italian Unification. A case study of post-unification Bologna
- 469 Miguel Beas Miranda, Erika González García
Study and interpretation of citizens' multiple identities in Spanish schoolbooks on «Education for Citizenship and Human Rights»
- 489 Anthony L. Smyrniaios
The slow nationalization of Greek education through history teaching in the 19th Century
- 505 Branko Šuštar
The historical development of the formation of the elite in the south of the Habsburg Empire. Slovenes and the schooling of the intellectual class in the late 1800s and early 1900s
- 527 Dorena Caroli
Russian schools abroad. National identity, Soviet reforms and cosmopolitan education by Sergei I. Hessen (1887-1950)

- 555 Elisabeth Erdmann
The functionalization of history and social studies
education in Germany from the 19th century until today
- 583 Pablo Toro Blanco
Towards a new Chile through the heart: aspects on the
construction of a nationalist *emotionology* in school
textbooks during Pinochet years (c.1974-c.1984)
- 601 Edvard Protner
The process of the Slovenian pedagogy gaining
independence under the Austro-Hungarian Monarchy
- 625 Agustín Escolano Benito
The identity of the schoolbook as textual genre and as
mediation of cultural construction of the educated citizenship
- 643 Giorgia Grilli
English public schools and the moulding of the
'Englishman'
- 669 International Referees' Committee (2015)

This issue

On the occasion of the tenth anniversary of «History of Education & Children's Literature» (2006-2015), we invited all the directors of the main scientific journals of history of education published all over the world, so that they can contribute to an ideal round table on the topic: *the role of scientific journals in the development and internationalization of historical-educational research*. The people who responded to this invitation – and we thank them very much for their exquisite and authoritative collaboration – are: Carlos Eduardo Vieira and José Gonçalves Gondra for «Revista Brasileira de História da Educação» (Brazil), Eckhardt Fuchs, Rebekka Horlacher, Jürgen Oelkers and Daniel Tröhler for «Bildungsgeschichte: International Journal for the Historiography of Education» (Switzerland), Décio Gatti Júnior for «Cadernos de História» (Brazil), José Luis Hernández Huerta and Antonella Cagnolati for «Espacio, Tiempo y Educación» (Spain), Maria Helena Camara Bastos, Claudemir de Quadros and Maria Stephanou for «História da Educação» (Brazil), Marta Ruiz-Corbella, Arturo Galán and Alfonso Diestro for «Educación XXI» (Spain) and, finally, Antonio Viñao Frago for «Historia y Memoria de la Educación» (Spain). They were joined by Roberto Sani as editor of «History of Education & Children's Literature» (Italy), which promoted the initiative.

In the first section of this issue the interventions of the above mentioned round table are collected. On the occasion of the tenth anniversary of «History of Education & Children's Literature», also a *Call for Papers* on the theme: *The school of the nineteenth and twentieth century as a laboratory for the promotion of national identity and for the education to citizenship* was launched. The invitation to participate, presenting their own contribution, was addressed to scholars and researchers of all over the world, especially to the historians of education and schools working in universities and specialized research centers of the different continents.

84 scholars from forty countries responded to this invitation, and they sent to the direction of «History of Education & Children's Literature» their proposals

(*abstract*) of a paper. A special scientific committee, chaired by the Director of «History of Education & Children's Literature», examined the various proposals received, and approved 50 of them. This issue, in the monographic section on the *Call for Papers*, includes the first 28 papers approved. For reasons of space, the remaining 22 will be published in the issue of December 2015 of «History of Education & Children's Literature»¹.

¹ In the issue of December 2015 of «History of Education & Children's Literature» the papers that will be published are those by: Alberto Barausse (Italy), José Luis Hernández Huerta & Sonia Ortega Gaité (Spain), Carla Ghizzoni (Italy), Maria do Rosário Longo Mortatti (Brazil), Maria Cristina Morandini (Italy), Valeria Viola (Italy), Beatrice Jane Vittoria Balfour (United Kingdom), Valeria Miceli (Italy), Elena Tabacchi (Italy), Décio Gatti Júnior & Bruno Gonçalves Borges (Brazil), Fabio Targhetta (Italy), Florindo Palladino (Italy), Mara Donato Di Paola (Belgium), Gianluca Gabrielli (Italy), Francisco A. González Redondo, Cristina Escrivá Moscardó & Gabriel Benavides Escrivá (Spain), Alberto Carli (Italy), Geert Thyssen (Luxembourg), Anna Ascenzi & Roberto Sani (Italy), Antonia Maria Mora Luna (Spain), Rossella Andreassi (Italy), Domenico F.A. Elia (Italy), Raymond McCluskey & Julie Robinson (United Kingdom), Michela D'Alessio (Italy), Fernando Rodrigues de Oliveira (Brazil), Marta Brunelli (Italy), Juri Meda (Italy).

*The role of scientific journals in the
development and internationalization of
historical-educational research*

edited by
Roberto Sani

«Revista Brasileira de História da Educação»: trajetória e os desafios da internacionalização (2001-2014)

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Brazilian Journal of the History of Education: the challenges of internationalization (2001-2014)

ABSTRACT: In this article, we analyse the Journal of the History of Education between 2001 and 2014. At first, we characterize the journal and its structure to then reflect on the national and international dimension of the magazine, considering the institutional affiliations of the authors who published in the same over the 14 years of existence. As regards the national level, we observed a journal insertion in almost all of Brazil, with a hyper-concentration of production derived from the states of São Paulo, Rio de Janeiro and Minas Gerais, all the Southeast. Asymmetry that takes place both at the national level, as at the regional level and also within different states of Brazil. On the international scale, we see signs of the existence of networks of a few countries, such as Portugal, France and Argentina, evidence of which is more organized and what still needs to be increased in terms of English-speaking countries and Latin America, but especially in relation to unexplored universes as the Middle East, European east, Africa, Asia and Oceania. Finally, we weave some considerations about the problem of internationalization, drawing attention to the issue of language and other challenges to a community of historians of education who wish to be transnational.

EET/TEE KEYWORDS: Periodical; History of Education; Scientific Research; International Studies; Cultural Associations; Brazil; XXI Century.

A «Revista Brasileira de História da Educação» (RBHE) foi criada pela Diretoria da Sociedade Brasileira de História da Educação (SBHE), após a realização I Congresso Brasileiro de História da Educação (I CBHE), em novembro de 2000. De acordo com a documentação da revista, presente no site do periódico, sua missão é «divulgar a produção científica nacional e internacional sobre História e Historiografia da Educação, que se revele de interesse para as grandes áreas de pesquisa em Educação e em História, abrindo novos horizontes de discussão e estimulando debates interdisciplinares»¹. O primeiro número da revista foi publicado em junho de 2001 e, até dezembro de 2014, foram publicados 36 números, perfazendo 256 artigos². Até 2006, a RBHE circulou com periodicidade semestral e, em 2007, passou a ser quadrimestral, evidenciando o potencial do campo em produzir resultados inéditos de pesquisa³.

O periódico se estrutura da seguinte forma: Conselho Diretor, envolvendo quatro membros da Diretoria da SBHE, responsáveis pela articulação entre a SBHE e a RBHE; Comissão Editorial, envolvendo o Editor Geral e três Editores Adjuntos, responsáveis pelas demandas acadêmicas e executivas do periódico; e Conselho Consultivo (Nacional e Internacional), imbuído da avaliação da política editorial e, eventualmente, de artigos e de dossiês submetidos. Estas posições são ocupadas por pesquisadores reconhecidos, nacional e internacionalmente. De acordo com os estatutos da SBHE, os integrantes da Comissão e dos Conselhos são indicados pela diretoria e eleitos pelos associados em assembleia. A revista conta ainda com uma Secretária de Redação, responsável pela administração das rotinas de submissão, avaliação e publicação de artigos; além de um grupo variável de Consultores (Referres), que atuam sob demanda específica no processo de arbitragem dos manuscritos submetidos. Em 2012, por exemplo, a RBHE contou com a colaboração de 96 especialistas na função de referres.

Sediada atualmente na Universidade Estadual de Maringá, a RBHE publica artigos, dossiês, notas de leitura e resenhas. A partir de 2014, a revista passou a ser publicada basicamente em versão on line, de acesso livre⁴. No entanto, a

¹ «Revista Brasileira de História da Educação», <<http://www.rbhe.sbhe.org.br/index.php/rbhe/about/editorialPolicies#focusAndScope>> (accessed: December 18, 2014).

² Este artigo não tem a pretensão de atualizar a análise realizada pelo artigo *Difusão, apropriação e produção do saber histórico. A Revista Brasileira de História da Educação (2001-2007)*, publicado na RBHE em 2008, pois o espaço, finalidades e destinatários este estudo é muito distinto do que foi empreendido anteriormente: <<http://www.rbhe.sbhe.org.br/index.php/rbhe/article/view/113/124>>, (accessed: December 18, 2014). Contudo, alguns números e informações presentes neste artigo podem cumprir esta função.

³ Para uma compreensão mais geral do campo da história da educação no Brasil, cf. J.G. Gondra *et al.*, *History of education in Brazil: the construction of a knowledge field*, «Paedagogica Historica», vol. 50, 2014, pp. 1-8.

⁴ Para acessar a RBHE: <<http://rbhe.sbhe.org.br/index.php/rbhe>> (accessed: December 19, 2014).

versão impressa ainda circula, condicionada ao pagamento de taxa extra por parte dos associados interessados na recepção do periódico neste formato. Todos os textos recebidos pela Secretaria passam por minuciosa verificação, propiciada pelo programa iThenticate CrossCheck, para evitar plágios e más condutas científicas. Sobre este aspecto, a RBHE endossa plenamente as diretrizes, internacionalmente acordadas, do COPE (Committee on Publication Ethics), visando evitar o plágio, as publicações redundantes e outras possíveis violações éticas. O conteúdo veiculado pela RBHE se encontra indexado em 6 Bases de Dados, 8 Diretórios e 2 Portais. A revista, desde o seu início, vem sendo objeto de avaliação externa, particularmente do Programa Qualis, desenvolvido pela Coordenação de Aperfeiçoamento de Pessoal de Nível Superior (CAPES). Este programa, no último processo avaliativo, classificou a RBHE com periódico do estrato A2, considerando uma escala de oito níveis que tem o estrato A1 como o seu ápice.

Os 14 anos de circulação ininterrupta da RBHE, a periodicidade quadrimestral e, sobretudo, os resultados obtidos nas avaliações externas evidenciam a posição consolidada da revista no campo da divulgação científica no país, bem como o seu papel e o seu potencial como articuladora do conhecimento histórico e educacional. Neste sentido, como demonstraremos adiante, a RBHE situa-se bem representada no âmbito das fronteiras nacionais, da mesma forma que demonstra potencial para ampliar a sua inserção internacional⁵. As posições ocupadas no campo acadêmico-educacional brasileiro pela RBHE e pelos outros periódicos nacionais dedicados ao campo da História da Educação⁶ sinalizam para a pujança da área em termos de pesquisa e ensino, tanto no plano da formação de professores e de pedagogos no âmbito da graduação, como na formação de novos pesquisadores no contexto da pós-graduação stricto sensu.

⁵ O estudo de Cordeiro (2008) analisa a RBHE, juntamente com a «Revista Brasileira de Educação», <<http://www.scielo.br/revistas/rbedu/iaboutj.htm>> e a «Revista Brasileira de História», <<http://www.scielo.br/revistas/rbh/iaboutj.htm>>. Já o estudo de Bontempi Junior (2012) procura observar a inserção da história da educação na «Revista Brasileira de Estudos Pedagógicos», <<http://rbep.inep.gov.br/index.php/RBEP>> (accessed: December 19, 2014).

⁶ Além da RBHE, outros três periódicos brasileiros se especializaram na divulgação de pesquisas do campo da História da Educação: «Revista História da Educação», <<http://seer.ufrgs.br/asphe>>; «Cadernos de História da Educação», <<http://www.seer.ufu.br/index.php/che/>> e «Revista Histedbr On-Line», <<http://www.fe.unicamp.br/revistas/ged/histedbr>> (accessed: December 19, 2014). Os dois primeiros foram classificados no estrato A2 e, o último, no estrato B1.

A RBHE em números

No levantamento que realizamos, entre 2001 e 2014, a RBHE publicou 36 números, totalizando 256 artigos, escritos por cerca de 314 autores. A revista apresenta abrangência nacional, uma vez que identificamos autores com filiações institucionais oriundas de todas as cinco regiões brasileiras. Não obstante, refletindo as históricas diferenças regionais do país, algumas regiões aparecem pouco representadas, como é o caso da Região Norte, com apenas 3 autores, enquanto a Região Sudeste comparece com 157 autorias. Entre os estados em que se situam as universidades da Região Sudeste identificamos 61% dos autores com artigos publicados na RBHE, considerando autorias e coautorias. Existe, porém, nesta região, uma clara diferença entre o número de autores provenientes das instituições dos estados de São Paulo, Rio de Janeiro e Minas Gerais em comparação com o número de autores oriundos do Estado do Espírito Santo.

Tabela 1. Autores com publicação na RBHE, entre os anos de 2001 e 2014, em relação as suas vinculações institucionais nos diferentes estados e regiões brasileiras

<i>Regiões</i>	<i>Estados</i>	<i>Autores</i>	<i>%</i>
Norte	Amazonas	1	1%
	Pará	2	
	Total 1	3	
Nordeste	Alagoas	1	7%
	Pernambuco	4	
	Maranhão	1	
	Paraíba	3	
	Rio Grande do Norte	1	
	Sergipe	9	
	Total 2	19	
Centro Oeste	Distrito Federal	1	5%
	Goiás	5	
	Mato Grosso	3	
	Mato Grosso do Sul	4	
	Total 3	13	
Sul	Paraná	18	17%
	Rio Grande do Sul	15	
	Santa Catarina	11	
	Total 4	44	

Sudeste	Espírito Santo	5	61%
	Minas Gerais	41	
	Rio de Janeiro	53	
	São Paulo	58	
	Total 5	157	
	Sem Filiação Inst. Identificada	23	9%
	Total	259	100%

Fonte: RBHE 2001-2014.

Na Região Nordeste se destaca o Estado do Sergipe, chamando atenção para ausência de trabalhos do Ceará, Bahia e Piauí, estados que possuem grupos organizados com frequência regular nos principais eventos da área. Nas regiões Centro Oeste e Sul, percebemos um relativo equilíbrio na veiculação de artigos provenientes de autores dos estados que compõem estas regiões. Goiás e Paraná aparecem levemente acima dos demais, enquanto que o Distrito Federal, pelas características peculiares deste estado, destoa dos demais estados do Centro Oeste, com apenas uma autoria⁷. Entre as três universidades brasileiras como maior número de autores na RBHE, destacamos a Universidade Federal de Minas Gerais (UFMG), a Universidade de São Paulo (USP) e a Universidade Federal do Rio de Janeiro (UFRJ)⁸.

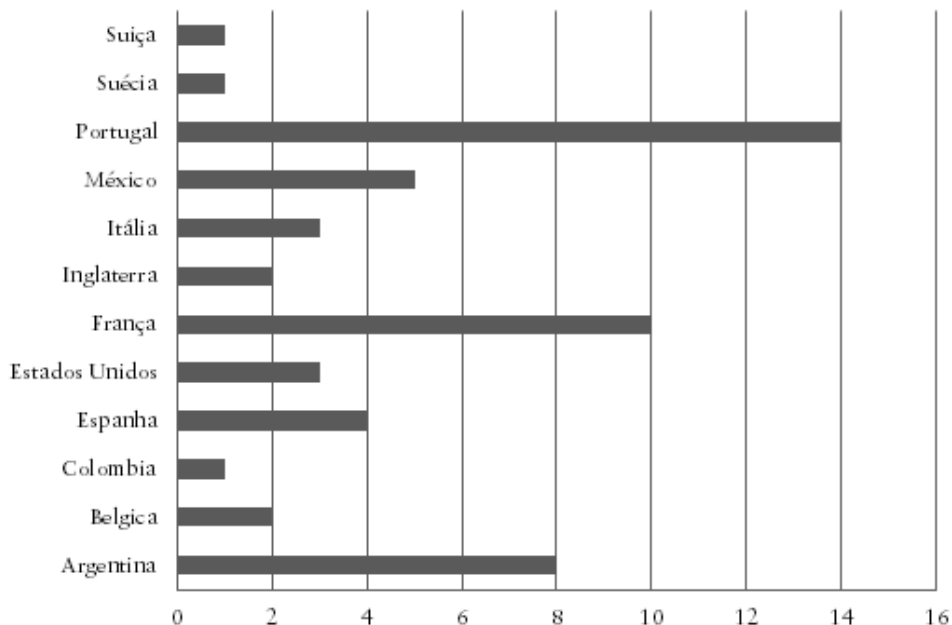
Esses números evidenciam, por um lado, a abrangência nacional da RBHE, mas, por outro, a desigualdade na produção da ciência no Brasil que, guardadas as devidas diferenças, assemelha-se à distribuição desigual da riqueza e da população no país. O debate a respeito da questão da desigualdade no campo científico é complexo e muito estudado, logo, como os objetivos deste artigo envolvem a apresentação da RBHE e, sobretudo, a circulação internacional da revista, nos ateremos a estes dados e análises sobre o periódico nos planos nacional e regional.

Quanto aos artigos em que os autores atestam sua filiação institucional em países estrangeiros, contabilizamos 55 autorias, totalizando cerca de 18% em relação ao total de 314 autores e coautores que publicaram na RBHE, entre os anos de 2001 e 2014. Em números absolutos, a distribuição destes pode ser observada no gráfico abaixo.

⁷ Nota-se a inexistência de artigos oriundos do Acre, Rondônia, Roraima, Amapá e Tocantins; últimos Estados constituídos no Brasil, com tradição universitária recente.

⁸ Para uma análise da ação de professores e grupos de história da educação que atuam em programas de pós-graduação em Educação, cf., Warde, 2011 e 2011a.

Gráfico 1. Artigos Provenientes de Autores com Filiação Institucional no Exterior



Fonte: RBHE 2001-2014.

Destes 55 artigos, apenas cinco foram escritos em coautoria com pesquisadores brasileiros, o que indicia o reduzido investimento de pesquisa em comum entre autores brasileiros e estrangeiros. Dos doze países representados, oito são provenientes do continente europeu, com destaque para Portugal e França. No continente americano, temos quatro países, com destaque para os autores com filiação institucional nas universidades argentinas. A análise deste processo de circulação internacional da produção no campo da história da educação não pode, obviamente, se ater ao espaço de uma revista. Contudo, estes dados indicam alguns aspectos da realidade brasileira, bem como do movimento internacional do campo.

O primeiro deles é a chamada barreira da língua. Nesse sentido, a maior presença de texto oriundos das universidades portuguesas indica, por um lado, uma história e um conjunto de ações de pesquisa em comum, tais como o Congresso Luso-Brasileiros de História da Educação que, em 2014, realizou sua décima edição; além da circulação constante de pesquisadores portugueses e brasileiros envolvidos em seminários, projetos, doutoramentos e estágios de pós-doutorado nos dois lados do Atlântico⁹. Por outro, a difusão ser processa

⁹ Em linhas gerais, essa relação vem sendo pautada por uma assimetria importante, cuja

em uma língua pouco reconhecida e legitimada nos espaços de credenciamento e circulação da ciência em âmbito internacional. Neste sentido, os autores oriundos de países anglo-saxões (Estados Unidos e Inglaterra), que praticam a língua que se impôs como franca para o debate acadêmico, comparecem em número reduzido de artigos; cinco no total.

A presença significativa dos autores vinculados à instituições francesas parece exigir uma explicação diferente. Neste caso, a questão não é a língua, mas o diálogo intenso que o campo historiográfico brasileiro e, especialmente, a história da educação, tem mantido com a cultura historiográfica francesa. No plano da América Latina, a presença de autores argentinos exprime uma tendência promissora de interlocução entre estas duas culturas historiográficas. Não obstante, a falta de autores de outros países latino-americanos se constitui em uma grave realidade, uma vez que a proximidade das fronteiras geográficas e linguísticas poderia favorecer a ampliação desse intercâmbio. Neste caso, os obstáculos parecem ser de outra ordem, cabendo notar a estrutura da pesquisa nos demais países da América Latina. Entre as ausências, também cumpre assinalar a inexistência de artigos oriundos do oeste europeu, Oriente Médio, África, Ásia e Oceania.

A guisa de conclusões: horizontes da internacionalização

A questão da internacionalização não depende, unicamente, da questão da língua predominante nas publicações, uma vez que não basta traduzirmos os textos da RBHE para o inglês para sermos lidos pelo mundo acadêmico em contexto internacional. Existe uma correlação de forças políticas e econômicas que se faz sentir nos jogos do poder entre os países, instituições, sujeitos e saberes envolvidos na chancela e controle do debate científico. Não obstante, reconhecer esse cenário de desigualdade não deveria implicar na adoção de uma posição imobilista, de pura contemplação desta lógica, de seu funcionamento e efeitos diversos. Muitas ações podem ser realizadas no sentido de aproximar as diferentes culturas acadêmicas e linguísticas, entre as quais destacamos a promoção do português, assim como de outras línguas marginalizadas na comunicação científica, como possibilidades para a comunicação dos resultados da ciência em geral e da História da Educação em particular. Para além da questão língua, o incremento de iniciativas de pesquisa, internacionalmente coordenadas e horizontalmente dirigidas, pode favorecer a aproximação de pesquisadores de diversos países e continentes, permitindo que se fecunde o diálogo e o reconhecimento das singularidades nacionais, culturais, linguísticas e educacionais.

análise escapa à finalidade deste artigo.

Neste contexto, os periódicos científicos podem cumprir uma função decisiva no sentido de funcionarem como polo de atração de pesquisadores de diferentes países, com orientações e tradições de pesquisa singulares. Tal investimento pode colaborar para o estranhamento de certezas mais ou menos estabilizadas, procedimentos de trabalho cristalizados e sínteses generalistas. Esse investimento se configura em potência para novas abordagens, problemas, fontes e narrativas. Ao ampliar a comunidade e ao contrastar experiências distintas, os periódicos especializados no campo da história da educação podem servir como instrumento de crítica permanente ao saber que tem sido forjado local e transnacionalmente.

Para tanto, enfrentar os desafios da internacionalização exige refletir sobre as assimetrias nacionais e a concentração de saber e poder também verificáveis em escala mundial. Nesse último caso, o idioma consiste apenas em uma expressão das mediações em curso e, talvez, a mais simples, fácil e rápida de ser superada. Desconcentrar os domínios existentes e sua legitimidade requer a fundação de outra economia dos saberes. Nesta direção, um periódico como a RBHE, pautado por uma política editorial rigorosa e aberta à colaboradores com pertencimentos plurais se configura em um dispositivo necessário para desbloquear e alargar as fronteiras do saber sobre a educação e sua história.

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Challenging national boundaries in the history of education

An outline of the journal «Bildungsgeschichte: International Journal for the Historiography of Education» (IJHE)

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ABSTRACT: The journal «Bildungsgeschichte / International Journal for the Historiography of Education» is a bilingual forum (German and English) that aims to provide for, strengthen, and further develop both meta-theoretical and specific-topic discussions. At the meta-theoretical level, the journal promotes the de-nationalization of research and its central research questions, calls into question both «great theories» of history and epochalizations, and pursues the combination of historical and comparative research approaches in the field of education. At the specific content level, it focuses on the rise and development of

the school system; nationalization and internationalization of education policy; history of science, history of education, and history of theory since the Renaissance; and issues in historiography.

EET/TEE KEYWORDS: Periodical; History of Education; Research Method; Scientific Research; International Studies; XXI Century.

The journal «Bildungsgeschichte: International Journal for the Historiography of Education» (IJHE) is a double blind peer reviewed, international, and bilingual journal dedicated to the history and the historiography of education, aiming thus at both substantive material studies and methodological and epistemological reflections. It furthermore deliberately initiates innovation in the field by addressing controversial topics and by offering a *Carte Blanche* to renowned scholars.

Initially, the IJHE started twenty years ago in 1995 under the name «*Neue Pestalozzi-Blätter*» [*New Pestalozzi-Papers*]¹, renaming itself in 2001 as «*Zeitschrift für pädagogische Historiographie*» [*Journal for the Historiography of Education*]². Collaborating from 2011 onward with a new publishing house, Klinkhardt in Bad Heilbrunn, Germany, the editors decided on the current title «Bildungsgeschichte. International Journal for the Historiography of Education» (IJHE), reflecting the bilingual character of the journal (English and German) as well as its international scope³.

During these twenty years of publication, this journal has mirrored the development of thematic features and research trends in the field of the history of education. Among the most recent changes are the increasing challenge of national boundaries in the history of education and the need for theoretical reflection and methodological innovation.

Internationality...

The international orientation of IJHE has a twofold aim. First, the journal presents new knowledge about different national, regional or local histories,

¹ The occasion was the 250 anniversary of Johann Heinrich Pestalozzi in 1996; the ‘model’ were the *Pestalozzi-Blätter* [*Pestalozzi-Papers*] published between 1880 and 1906 by the Pestalozzianum.

² As joint venture between the (meanwhile dissolved) Pestalozzianum Research Institute for the History of Education Zurich and the University of Zurich.

³ In contrast to the predecessors, the current journal is not a venture of institutions but of the (until 2012) three and since 2013 four editors Eckhardt Fuchs, Braunschweig, Rebekka Horlacher, Jürgen Oelkers, both Zurich, and Daniel Tröhler, Luxembourg.

and second it provides a forum where different research methodologies, epistemological systems, and historiographical traditions may be discussed. It is therefore based on the assumption that the histories of education differ in what they mean to be and to do between the different national or cultural traditions, and by that they usually design their research agendas within specific cultural contexts. This means from a historical perspective that once the idea of the importance of history of education had become accepted internationally it became evident that the sameness of the idea turned out to be in fact very different in its actual materialization: The new genre 'history of education' was adapted to the different cultural aspirations of the individual nations.

... as means against national blinders

The term «historiography» in the title refers to these cultural (or national) differences in writing history (of education). Rather than the term «history», «historiography» reflects different epistemological and historiographical systems in the field of history of education. These differences have not been reflected thoroughly by historians of education. School histories, for instance, often follow different cultural or national paradigms for “doing” school history, reflecting culturally dominant perceptions of social order and progress. German histories of schooling were traditionally written in the vertical tension of social exclusion, focusing on strategies of social advancement of the bourgeoisie and the exclusion of the middle and lower classes. A focus like that might reflect the difficulties of Germany with the establishment of a republic with formally equal citizens – a concern that is less likely to be found in the United States, Switzerland, or France. The French and the Swiss historiographies focus much less on vertical tensions between the upper and the lower classes, but rather on ideological tensions on the horizontal level between liberals and conservatives. The US American historiography in turn is different again, where we find a system of reasoning that deals strikingly often with progress and pertinence or resilience. The major focus here is not between upper and lower social classes or the ideological fight between liberals and conservatives, but on how reforms affect the development of the school, or vice versa, how schools affect reform progresses.

The journal will contribute to identifying such academic-cultural or national modes of understanding the history of education and to establish a critical self-reflection and dialogue. The mutual realization of different cultural modes of doing history of education, or even schooling, will enhance the quality of the historiography of history of education.

Innovation and inspiration through controversial discussions

It is a distinct feature of the IJHE to promote discussions on topics relevant to the international development of the history of education. These topics in the journal's section titled «Debate» are suggested by the editors who invite scholars to make a provocative case and have it discussed among experts from around the world in the very same issue of the journal. In contrast to the other articles in the journal, the contributions in this section are not double blind reviewed, because the objective is to provide a free and open space where people can freely contribute their ideas and the 'peer reviewing' is in the form of the dialogues/debates that the submissions in this section trigger. In 2011, for example, experts discussed Lynn Fendler's *Foucault as Teacher Educator*, in 2012 David Labaree's *A Sermon on Educational Research* and Inés Dussel's *The visual turn in educational history: Just another fad, or a serious challenge to historian?* In 2013 the cases in this section included *Homosexuality and Violence as Challenges to Theory and Historiography of Education* (William F. Pinar) and *The Short Timelines of History of Education at Present* (Edwin Keiner). These cases were written by colleagues from the US, Canada, Mexico, UK, Germany and Portugal; the commentators came from Australia, Austria, Belgium, Canada, China, England, Estonia, Finland, Germany, Italy, Luxembourg, the Macao, Netherlands, Scotland, Switzerland, the US, Sweden, and New Zealand.

The upcoming topics in this section will address the challenges of digital humanities to historiography and the question, if and when yes how, education can be shaped without any religious context.

Carte Blanche

International journals have become more and more standardized with regard to structure, citation formats, and length. However, these standardizations have also been criticized as stifling creativity and intellectual innovation, marginalizing seemingly minor events or sources, or helping dominant modes of doing research to become even more dominant. Whereas IJHE advocates the internally accepted academic standards with regards to its articles, it recognizes the danger of excluding cutting edge ideas that could potentially be important for the history of education.

In order to avoid this risk IJHE introduced a section serving as «Carte Blanche» for internationally renowned scholars. In this section scholars are invited to write about whatever arouses their interest. In this sense, Heinz-Elmar Tenorth wrote (2011) about the way in which obituaries in newspapers serve as source for the indication of formation-scenarios after death. He also addressed school camps

or summer camps as an important field of educational experiences, and an area of education research which has often been marginalized. Richard Aldrich, to name another example, suggested Rudyard Kipling's poem *If* (1885/1910) or the Rosetta Stone as sources of historical inquiry in education (2013).

Book reviews

The emphasis on the importance of international discussion is not only reflected in the section «Debate», but also in the book review section. The editors of IJHE are convinced that an international exchange in the history of education must include reviewing books being published in this field. Such a section also serves to introduce new colleagues into the academic community. IJHE places great importance on ensuring that every issue has in average six to seven books reviewed, most of them being published – according to the bilingual character of the journal – either in German or in English.

All together, its special emphasis and innovative structure makes IJHE a unique forum of academic exchange and communication. It initiates international debates, inspires researchers through its provoking topics, promotes epistemological self-reflection, and opens up new perspectives in the field of history of education.

The role and current challenges of the Brazilian periodical «Cadernos de História da Educação» in scientific publishing in the history of education in the twenty-first century

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ABSTRACT: This text presents the scientific periodical «Cadernos de História da Educação» to scholars in the area of History of Education. The periodical was created in 2002 from the efforts of members of the Research and Study Group of History and Historiography of Education within the Graduate Studies Program in Education of the Universidade Federal de Uberlândia (Federal University of Uberlandia), in Minas Gerais, Brazil. This text presents the basic historical data, the main characteristics, the national and international dimensions, and the current challenges for continuity and increasing the quality of the periodical.

EET-TEE KEYWORDS: Periodical; History of Education; Research Method; Scientific Research; Brazil; Cultural Associations; XXI Century.

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1. *History and characteristics of the periodical «Cadernos de História da Educação»*

The emergence of a research group in History of Education at the Universidade Federal de Uberlândia (UFU) [Federal University of Uberlandia, Uberlandia, MG, Brazil] at the beginning of the 1990s allowed creation of a line of research dedicated to the History and Historiography of Education within the Graduate Studies Program in Education of that university. Both initiatives in the area of History of Education led to the need for publication of the results of research. Up to that time, scientific production had been transmitted mainly in the *Boletim* (Report) of the *Centro de Documentação em História* (History Documentation Center), but, as time passed, the volume of publications exceeded the capacity of that *Boletim*, which led to the creation of the periodical «Cadernos de História da Educação» (*Notes on the History of Education*) in 2002.

At first, the periodical «Cadernos de História da Educação» was to be simply a vehicle to publish results of investigations developed by researchers of UFU, but this objective was soon abandoned, above all due to the emergence of a complex periodical evaluation system called Qualis, developed within the sphere of the Coordenação de Aperfeiçoamento de Pessoal de Nível Superior (CAPES), the governmental agency responsible for evaluation of the quality of graduate studies in Brazil.

Thus, the periodical sought to meet the quality criteria arising from Qualis/CAPES, specifically those established for the area of Education, and it soon achieved positive evaluations. Already in 2008, the periodical was classified in the A2 level of Qualis/CAPES (Education Area), on a scale that includes the following levels: C (the lowest), B5, B4, B3, B2, B1, A2, and A1 (the highest)².

The periodical was published annually up to 2008, passing to publication every semester in 2009. Currently, around 40 articles per year are published, as well as interviews with researchers in the area of History of Education, documents of historical-educational interest, and book reviews. As of 2008, its issues were made available on Internet through the Sistema Eletrônico de Editoração de Revistas (SEER) [Electronic System of Magazine Publishing], which is a Brazilian adaptation of the *Open Journal Systems* (OJS)³.

² Currently, there are four scientific periodicals in activity specifically in the area of History of Education in Brazil, namely: «História da Educação», since 1997; «Revista Histedbr On Line», since 2000; «Revista Brasileira de História da Educação», since 2001; and «Cadernos de História da Educação», since 2002. All of them have achieved the highest levels in Qualis of Capes in the area of Education, and are currently in positions from B1 to A2.

³ Currently, the on-line version of the periodical may be accessed at the following electronic address on the Internet: <<http://www.seer.ufu.br/index.php/che/>> (accessed: September 15, 2014).

Since the beginning of its publication, *Cadernos de História da Educação* has had the support of the Publisher of the Universidade Federal de Uberlândia and, as of 2010, also came to have the support of the Fundação de Amparo à Pesquisa do Estado de Minas Gerais (Fapemig). From 2002 to 2008, the periodical accepted proposals for publication written in Portuguese and Spanish, and, as of 2009, French and English were added.

The graphic design gave identity to the periodical both through the format, larger than usual, but also from inclusion of a photographic image on the cover linked to the historical-educational facts of the Minas Triangle and Upper Paranaíba region in Minas Gerais, Brazil. The photographs showed the universality of the phenomenon of schooling, and made reference to the place of origin of the periodical. Thus, a graphic design took hold in the first ten years of the periodical and, since then, another design was implemented, without, however, losing the original identity, as may be seen in Figures 1 and 2.



Fig. 1. Cover of Volume 1, Number 1, January to December 2002 of the periodical *Cadernos de História da Educação* in the 18.5 x 27.5 cm format.



Fig. 2. Cover of Volume 13, Number 1, January to June 2014 of the periodical *Cadernos de História da Educação* in the 18.5 x 27.5 cm format.

2. The dimensions and the national and international impact of the periodical

The continental dimensions of Brazil present a great challenge in regard to the scope and national impact of a scientific periodical. In the case of «*Cadernos de História da Educação*», the exogenous character has predominated, seen in the figure of 76% of articles from authors outside of UFU (64% of authors from different Brazilian institutions, and 12% of authors from foreign institutions) as may be seen in Table 1.

Table 1. Number of articles published in *Cadernos de História da Educação* in its different volumes and numbers according to the national and international location of the institutions of higher education (IHE) to which the main authors are affiliated (from 2002 to the first semester of 2014)

Volume/Year	Number of articles published according to the location of the institutions of higher education to which the main authors were affiliated						Total
	National				International	%	
	UFU	%	Other IHE	%			
v.1 / 2002	21	91%	02	09%	00	00%	23
v.2 / 2003	02	12%	13	81%	01	07%	16
v.3 / 2004	04	25%	10	62%	02	13%	16
v.4 / 2005	05	29%	08	47%	04	24%	17
v.5 / 2006	02	17%	08	66%	02	17%	12
v.6 / 2007	04	29%	07	50%	03	21%	14
v.7 / 2008	04	21%	13	69%	02	10%	19
v.8, no.1 / 2009	01	07%	12	86%	01	07%	14
v.8, no.2 / 2009	03	21%	10	72%	01	07%	14
v.9, no.1 / 2010	04	29%	10	71%	00	00%	14
v.9, no.2 / 2010	06	37%	08	50%	02	13%	16
v.10, no.1 / 2011	03	19%	09	56%	04	25%	16
v.10, no.2 / 2011	02	11%	09	50%	07	39%	18
v.11, no.1 / 2012	03	18%	11	64%	03	18%	17
v.11, no.2 / 2012	02	11%	15	83%	01	06%	18
v.12, no.1 / 2013	02	11%	16	89%	00	00%	18
v.12, no.2 / 2013	01	05%	17	90%	01	05%	19
v.13, no.1 / 2014	04	21%	12	63%	03	16%	19
Total	73	24%	190	64%	37	12%	300

In regard to the national dimension of the periodical, also from 2002 to the first semester of 2014, expansion of the number of Brazilian researchers seeking to publish in the periodical can be seen, as well as their different institutional affiliations, which included institutions based in 19 states of Brazil, from the five regions of the country, as may be seen in Table 2.

Table 2. Quantity and percentage of articles published in the «Cadernos de História da Educação» per region and state of the Brazilian federation (from 2002 to the first semester of 2014)

<i>Region</i>	<i>Articles</i>	<i>%</i>	<i>States Of Location Of The Ihe</i>	<i>Articles</i>
Center-West	21	08%	1. Goiás	008
			2. Mato Grosso	002
			3. Mato Grosso do Sul	010
			4. Tocantins	001
Northeast	15	06%	5. Bahia	002
			6. Ceará	001
			7. Maranhão	002
			8. Paraíba	001
			9. Pernambuco	002
			10. Rio Grande do Norte	001
			11. Sergipe	006
North	02	01%	12. Pará	001
			13. Rondônia	001
Southeast	182	68%	14. Minas Gerais	129
			15. Rio de Janeiro	017
			16. São Paulo	036
South	43	17%	17. Paraná	016
			18. Rio Grande do Sul	020
			19. Santa Catarina	007
Total	263	100%	19 States	263

From the data, it can be concluded that there was a predominance of publication of articles from researchers affiliated with Brazilian institutions based in the Southeast region, which represented 68% of the total, above all from Minas Gerais, followed by São Paulo and Rio de Janeiro. In second place were authors affiliated with institutions from the South region, with 17%, especially Rio Grande do Sul and Parana. The researchers of the Center-West and Northeast appeared at 8% and 6% of the articles published, respectively, with Mato Grosso do Sul, Goias, and Sergipe standing out. Finally, there were authors from the North region at a low level of frequency, with 2 articles, 1% of the total.

Furthermore, in regard to the national dimension of the «Cadernos de História da Educação», recently, the editorial board carried out efforts to expand the number of members of the editorial and advisory committee through increasing the diversity of regions, states, and the institutions of higher education to which the professional are affiliated. This resulted in a total of 14 states and 35 universities, as shown in Table 3.

Table 3. Institutions to which Brazilian members of the editorial and advisory committee of the periodical «Cadernos de História da Educação» are affiliated (2014)

<i>Region (No.)</i>	<i>%</i>	<i>States (No.)</i>	<i>No.</i>	<i>Institutions of Affiliation</i>
Center-West (06)	11	1. Mato Grosso (03)	03	1. Univ. Federal de Mato Grosso
			01	2. Univ. Católica Dom Bosco
			02	3. Univ. Federal de Mato Grosso do Sul
Northeast (05)	09	3. Maranhão (01)	01	4. Univ. Federal do Maranhão
			01	5. Univ. Estadual da Paraíba
			01	6. Univ. Federal do Piauí
			01	7. Univ. Federal do Rio Grande do Norte
			01	8. Univ. Federal de Sergipe
North (01)	01	8. Pará (01)	01	9. Univ. Federal do Pará
Southeast (33)	58	9. Minas Gerais (16)	01	10. Pont. Univ. Católica de Minas Gerais
			02	11. Univ. Federal de Minas Gerais
			13	12. Univ. Federal de Uberlândia
		10. Rio de Janeiro (06)	01	13. Pont. Univ. Católica do Rio de Janeiro
			02	14. Univ. do Estado do Rio de Janeiro
			01	15. Univ. Estadual do Norte Fluminense
			01	16. Univ. Federal do Rio de Janeiro
			01	17. Univ. Federal Fluminense
			01	18. Pont. Univ. Católica de São Paulo
		11. São Paulo (11)	01	19. Univ. Católica de Santos
			04	20. Univ. de São Paulo
			01	21. Univ. Estadual de Campinas
			02	22. Univ. Estadual Paulista
			01	23. Univ. Federal de São Carlos
			01	24. Univ. Federal de São Paulo
South (12)	21	12. Paraná (05)	01	25. Pont. Univ. Católica do Paraná
			02	26. Univ. Estadual de Maringá
			01	27. Univ. Federal do Paraná
			01	28. Univ. Tuiuti do Paraná
		13. Rio Grande do Sul (05)	01	29. Pont. Univ. Cat. do Rio Grande do Sul
			01	30. Univ. do Vale do Rio dos Sinos
			01	31. Univ. Federal de Pelotas
			01	32. Univ. Federal do Rio Grande do Sul
			01	33. Univ. Federal de Santa Maria
		14. Santa Catarina (02)	01	34. Univ. do Estado de Santa Catarina
01	35. Univ. Federal de Santa Catarina			
Totals	100	14 States	57	35 Institutions

With this new configuration of the editorial and advisory committees, we expect to expand the diversity of regions, states, and institutional affiliations of the proposals sent to the periodical, as well as create conditions for examination of a greater number of themes observing the regional, state, and local specificities of the objects of investigation.

In regard to the international dimension of the periodical, as of the second year of its existence, there was publication of articles with authors affiliated with foreign universities. In absolute numbers, there were 37 articles, making up 12% of the total number of articles published by the periodical up to the first semester of 2014, as previously presented in Table 1.

As shown in Table 4, there was predominance of authors affiliated with institutions based in Portugal, at 50% of the total; after that, in sequence, were Spain (16%), Argentina (12%), and Chile (8%), which is due to the development, as of the 1990s, of consistent interchange among these countries in the area of History of Education, above all stemming from conferences and joint development of investigation projects. In a more dispersed manner, there were articles published by authors based in institutions in Belgium, the United States, France, the United Kingdom, and Venezuela.

Table 4. Quantity and percentage of articles published in «Cadernos de História da Educação» from authors affiliated with foreign institutions of higher education, with designation of the country, the number of articles, and the percentage, from 2002 to the first semester of 2014

<i>Country</i>	<i>Articles</i>	<i>%</i>
1. Argentina	04	12%
2. Belgium	01	02%
3. Chile	03	08%
4. Spain	06	16%
5. United States	02	06%
6. France	01	02%
7. Portugal	18	50%
8. United Kingdom	01	02%
9. Venezuela	01	02%
9 Countries	37 Articles	100%

Furthermore, in regard to the international dimension of the «Cadernos de História da Educação», recently, the editorial board expanded the number of members of the editorial and advisory committees affiliated with university institutions abroad, currently composed of 19 members from 12 countries and 16 institutions, as shown in Table 5.

Table 5. Configuration of the editorial and advisory committees of the periodical «Cadernos de História da Educação», with designation international location of the institutions to which the members, researchers in the area of History of Education, are affiliated (2014)

<i>Country</i>	<i>No. of members</i>	<i>Institutions of Affiliation</i>
1. Germany (01)	01	1. Humbolt Universität zu Berlin
2. Argentina (02)	01	2. Universidad Torcuato di Tella
	01	3. Universidad Nacional de Rosario
3. Belgium (01)	01	4. Universiteit Gent
4. Canada (01)	01	5. Université Laval
5. Chile (01)	01	6. Universidad Alberto Hurtado
6. Spain (02)	01	7. Universidade de Santiago de Compostela
	01	8. Universidad de La Laguna
7. United States (02)	01	9. Sacred Heart University
	01	10. Loyola University Chicago
8. France (01)	01	11. École Normale Supérieure de Lyon
9. Italy (01)	01	12. Università degli Studi di Macerata
10. Portugal (05)	04	13. Universidade de Lisboa
	01	14. Universidade do Minho
11. United Kingdom (01)	01	15. University of London
12. Uruguay (01)	01	16. Universidad de la República
12 Countries	19 Members	16 Foreign Institutions

Once more, we expect that this expansion will contribute to stimulating collaborations from these 12 countries, resulting in an increase in the volume of international proposals received, as well as in a gain in the quality of analysis with a view toward publication of studies coming from a greater number of countries, in different languages.

Finally, in regard to the national and international dimension of the «Cadernos de História da Educação», it is important to note that, in addition to availability of the full version of its issues on the Internet, the editorial board makes printed issues available to the authors, members of the editorial and advisory committees, and, above all, 76 institutions, in donation, (22 abroad and 54 Brazilian).

Current challenges

After this brief exposition in regard to the periodical «Cadernos de História da Educação», it may be concluded that there was an increase in its quality, and of its national and international impact in the area of History of Education.

However, the data show possibilities for improvement, namely, an increase in the number of articles published from authors affiliated with foreign institutions; an increase in the diversity of authors that publish in the periodical and that are affiliated with Brazilian institutions, above all from the Center-West, Northeast, and North regions; and availability of a bilingual edition of the articles published in the periodical, including the original language but also their version, preferentially in English, so as to allow an increase in the international impact of the periodical.

Reference

Carvalho, C.H., Gatti, Jr. D., Inácio Filho, G., Araujo, J.C.S., Gonçalves Neto, W., *História da Educação no Brasil: pesquisa, organização institucional e estratégias de divulgação científica*, «Cadernos de História da Educação», vol. 10, n. 2, 2011, pp. 45-67

En la Historia de la Educación. La gestión editorial, las revistas de Historia de la Educación y «Espacio, Tiempo y Educación»

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Inside the History of Education. The publishing management, the journals of History of Education, and «Espacio, Tiempo y Educación»

ABSTRACT: The debate concerning the standards of quality related to scientific journals deals with directors and researchers in every fields, because success for both depends on it. In this article three issues will be addressed: first, a critical analysis of the publishing management currently used; secondly, a view on journals of History of Education published in America, Europa and Oceania is provided; finally the journal «Espacio, Tiempo y Educación» is analyzed, both for the ideas on which it was created, giving meaning to its editorial project, and for the achievements, purposes and challenges that it will face in the medium term.

EET-TEE KEYWORDS: Periodical; Publishing Industry; History of Education; Research Method; Scientific Research; XX-XXI Centuries.

* Editores de «Espacio, Tiempo y Educación», <<http://www.espaciotiempoyeducacion.com>>.

1. *La gestión de revistas científicas hoy. Algunas reflexiones críticas*

En las tres últimas décadas, pero con especial intensidad en la más reciente, los modelos de gestión editorial de revistas académicas de ciencias sociales y humanidades se han modificado sustancialmente, convirtiéndose en una tarea más compleja y dinámica, tendente a la profesionalización. A día de hoy, los equipos editoriales ya no tienen que velar únicamente por dar sentido y unidad a la publicación y por la originalidad y significación científica de artículos, reseñas, entrevistas y otros materiales que publican, sino que sus integrantes deben desarrollar otras habilidades y destrezas sociales, burocráticas y técnicas que poco o nada tienen que ver con el trabajo eminentemente académico y científico¹.

Así las cosas, las revistas científicas que aspiran a hacerse un hueco en la comunidad académica deben tener en consideración varias cuestiones, independientemente del modelo de gestión que adopten². En primer lugar, a pesar de las dificultades que entraña, el número de publicaciones periódicas especializadas de nuevo cuño sigue en aumento, de forma particular en ciencias de la educación. Razón por la cual los equipos editoriales han de realizar un esfuerzo extra para definir con mayor claridad un proyecto que logre suscitar el interés y el reconocimiento de la comunidad científica, lo que implica procurar dar respuesta a los intereses, las inquietudes y necesidades de una parte significativa de ésta e imprimir al proyecto editorial de cierto carácter que lo distinga de otros. Dependiendo de la disciplina o área de conocimiento de que se trate, la tarea de encontrar un buen yacimiento científico e intelectual será más o menos sencilla, pero siempre entraña cierto riesgo de exceso de especialización, que podría, por falta de producción científica, agotar en poco tiempo el proyecto editorial o devenir en circuitos intelectuales retroalimentados.

¹ Existe una amplia literatura sobre gestión de revistas científicas y la calidad editorial de las mismas. Sobrepararía con creces los límites de este artículo intentar hacer siquiera un esbozo de catálogo. No obstante, consideramos oportuno destacar dos recientes monográficos que centran su atención en revistas de educación. El primero de estos es *The Future of Education Research Journals: Challenges and Responses*, editado por D. Post, publicado en vol. 22, 2014, de la revista «Education Policy Analysis Archives». Y el segundo es el aparecido en el vol. 20, n. 2, 2014, de la revista «RELIEVE» con motivo de su 20 aniversario; es preciso señalar que esta publicación fue pionera en España en muchos aspectos. A nuestro parecer, se extraña una literatura más amplia acerca de los aspectos no mesurables de la gestión de revistas, especialmente de aquellas que se sitúan en la órbita de las ciencias sociales y humanas, en las que el *talante* del proyecto editorial debería ser lo que dé sentido y significado a todo lo demás; ¿las revistas son fábricas de *papers* con aspiraciones de *popularidad* o han de responder a intereses, planteamientos y proyectos científicos?

² A pesar de la variedad y lo heterogéneo de los proyectos editoriales existentes en ciencias sociales y humanidades, son dos las principales tendencias de gestión editorial vigentes, que responden, en última instancia, a formas y modos de entender y hacer la ciencia muy distintos. Por un lado, se encuentran las revistas que se adhieren a la política académica y filosofía científica *open-access*, y por otro, las que siguen un modelo de gestión editorial comercial.

El segundo asunto que los editores han de atender es la calidad de la gestión de la revista, debiendo acomodarse a los estándares internacionales de *buenas prácticas*, que dan indicios de la seriedad, el rigor y la profesionalidad de la publicación, al menos en sus elementos externos, pues regulan los aspectos formales que han de cuidarse, tales como: transparencia en los procesos de edición, accesibilidad a los contenidos, apertura intelectual e internacionalización de autores e integrantes de los equipos editoriales, identificación completa de unos y otros, originalidad de los estudios, revisión por pares de las contribuciones, presencia de la publicación en repositorios y bases de datos, cumplimiento de la periodicidad, así como la adhesión a algún código ético editorial³. En ocasiones, como es el caso de la revisión de originales, cumplir con las *buenas prácticas* supone un reto adicional para los editores, pues requiere de éstos cierta capacidad para tejer una amplia red de colaboradores externos, especialistas en la disciplina que evalúen con rigor la científicidad y la oportunidad de publicar o no los artículos recibidos⁴.

Luego, es preciso trazar la estrategia de *indexación y marketing* para hacer llegar las investigaciones a la comunidad científica. Tradicionalmente esto se lograba, principalmente, a través de las bibliotecas de universidades y centros de investigación que, bien mediante cuantiosas suscripciones, bien gracias a los intercambios entre publicaciones, adquirirían, catalogaban y ponían a disposición del público los más novedosos progresos de la ciencia y la cultura. Ahora, esto sigue siendo de gran utilidad para todo tipo de revistas, *open-access* o *fee-access*. No obstante lo cual, a medida que se extienden y consolidan las revistas digitales, han ido perdido parte de su potencial, en beneficio de otras iniciativas de mayor envergadura, las bases de datos internacionales, que también disponen de sus propios catálogos de *buenas prácticas* o indicios de calidad editorial; en el área de educación destacan, entre otras, *Web of Science*, Scopus, Redalyc, ERIC, ERA, EBSCO, Doaj, DIALNET. Más recientemente, la complejidad de la difusión de los trabajos publicados en las revistas ha

³ El catálogo de buenas prácticas editoriales más extendido y mayoritariamente aceptado en el área de América Latina y Europa mediterránea es Latindex, que establece 33 características que han de cumplir las revistas impresas y 36 las electrónicas, además de una trayectoria de al menos tres números consecutivos. En España también se han emprendido iniciativas para catalogar las revistas en función de los indicios de calidad editorial, entre las cuales destacan DICE, RESH, ANECA, ANEP, FECYT.

⁴ Actualmente, no se pone en tela de juicio la necesidad de aceptar la existencia de peer-review en las revistas científicas. El debate se ha trasladado a la forma de gestionar los informes generados por los revisores externos y el modo de asegurar el anonimato de los mismos. Hay quienes cuestionan la idoneidad de publicar cada dos o tres años la lista de revisores que han participado, pues así se pierde el carácter «anónimo» de la tarea, aunque no se llegue a identificar al evaluador preciso de cada contribución. Otro de los asuntos que no están claros es si los informes de evaluación de los originales, con el ánimo de establecer cierta discusión científica entre el autor y el revisor, se deben hacer públicos. A este respecto puede resultar de interés: K.M. Anderson-Levitt, *Significance: U.S. Blind Spots in Judging Research*, «Education Policy Analysis Archives», vol. 22, n. 27, 2014, pp. 1-14.

umentado, debido a la relativa generalización de los social media, diseñados o no específicamente para la comunicación académica, como son Facebook, Twitter, Google Scholar, blogs especializados, Academia.edu, Research Gate, etc., que repercuten notablemente en la popularización de las revistas y dan respuesta a la necesidad publicitar ya mismo los resultados de las indagaciones. Tales asuntos reclaman de los equipos editoriales una amplia gama de saberes técnicos, burocráticos y publicitarios⁵.

Mas todo esto, en la práctica, es secundario, ya no para el éxito a largo plazo de las revistas, sino para la mera supervivencia de la publicación, cuyo entorno es cada vez más hostil y competitivo. A lo ya reseñado hay que añadir la presión ejercida por las agencias nacionales de evaluación de la calidad de la producción científica de docentes e investigadores que, frecuentemente, consideran que la singularización del proyecto, el cumplimiento de las buenas prácticas editoriales y la presencia en repositorios institucionales y bases de datos especializadas no son suficientes para acreditar la valía de las investigaciones, es necesario demostrar que la revista tiene cierto índice de popularidad objetiva en la comunidad científica. Entonces, dada la coyuntura, la vía más segura para lograr el éxito es alcanzar un alto índice de popularidad o factor de impacto, el suficiente para entrar en el selecto club de los rankings de revistas y sellos de calidad editorial, que se han convertido en el principal –casi el único – referente utilizado por las mencionadas agencias de calificación para valorar los méritos científicos de docentes e investigadores. Así pues, figurar en rankings internacionales como JCR (SSCI, WOS), SJR (Scopus), ERIH – ahora ERIH PLUS – y Scielo⁶, que son los que gozan de mayor prestigio y reconocimiento, progresivamente se van convirtiendo en el principal objetivo de las revistas, y publicar en éstas el de los investigadores, pues son conscientes que su trayectoria científica y profesional, así como su condición y situación dentro de la comunidad académica están notablemente condicionadas por el medio que elijan para compartir sus descubrimientos y someterlos al escrutinio de sus pares⁷.

⁵ Sobre el perfil de los equipos editoriales de revistas electrónicas y algunos aspectos de la incorporación de los social media: L. Rodríguez Yunta, C.M. Tejada Artigas, *El editor técnico: un perfil necesario para la profesionalización de la edición de revistas científicas en el entorno digital*, «Anales de Documentación», vol. 16, n. 2, 2013, pp. 1-9; A. Cooper, *The Use of Online Strategies and Social Media for Research Dissemination in Education*, «Education Policy Analysis Archives», vol. 22, n. 88, 2014, pp. 1-24.

⁶ En España se han puesto en marcha varios mecanismos de calificación y clasificación de revistas científicas, entre los que destacan ANEP, MIAR, In-RECS y, más recientemente, el sello de calidad de la FECYT, que es el único organismo que sigue actualizando los datos.

⁷ A este respecto pueden resultar de interés los siguientes trabajos: D. Post, A. Stambach, M. Ginsburg, E. Hannum, A. Benavot, C. Bjork, *Los Rankings Académicos*, «Education Policy Analysis Archives», vol. 21, n. 19, 2013, pp. 1-16; S. Canagarajah, *Local Knowledge When Ranking Journals: Reproductive Effects and Resistant Possibilities*, «Education Policy Analysis Archives», vol. 22, n. 28, 2014, pp. 1-20; L.D. Gonzales, A.-M. Núñez, *Ranking Regimes and the Production of Knowledge in Academia: (Re)shaping Faculty Work?*, «Education Policy

La utilidad de tales instrumentos es evidente, pero también son conocidos los reparos de los que son objeto, entre los cuales destacan el carácter privado y comercial de las entidades encargadas de elaborar los rankings, las discutibles formas de elaborarlos, el peligro de equiparar impacto/popularidad a calidad científica, la endogamia del conocimiento que tienden a generar, la falta de transparencia en los procesos de evaluación y, en el caso de las ciencias sociales y humanas, las políticas lingüísticas que subyacen, que privilegian el inglés por encima de cualquier otra lengua, lo que propicia un sutil, pero eficaz, colonialismo intelectual y cultural. Lo cual es otro ejemplo más de lo que N. Chomsky ha denominado «asalto neoliberal a universidades» y centros de investigación, que, poco a poco, van siendo despojados de parte de sus principios y fines más íntimos y genuinos⁸.

Frente a esta tendencia están surgiendo propuestas de calificación y clasificación, como Google Scholar Metrics, Altmetrics, Plum Metrics, que pretenden corregir algunas desviaciones e introducir cierto grado de democratización en la forma de elaborar los rankings de revistas, para lo cual se sirven de datos objetivos obtenidos vía Internet, especialmente de las webs de las revistas y de las cuentas oficiales de sus social media, distintas redes sociales y académicas tipo Facebook, Twitter, Google Scholar, Academia.edu, Research Gate, etc. Sin duda, son otra buena herramienta para hacerse una idea de la popularidad mediática y de la utilidad académica de la que goza una publicación, más aún si se combinan con los ya asentados. Pero, en líneas generales, gozan de los mismos reparos que estos últimos, a los que hay que añadir otros, entre los que destacan dos: en primer lugar, se introduce en las valoraciones cierto grado de arbitrariedad, pues el éxito depende del volumen de la comunidad científica a la que va dirigida, del número de investigadores que han incorporado a su modus operandi las tecnologías de la comunicación y la información y de la habilidad que tenga el community manager de la publicación; y, en segundo término, tal como han puesto de manifiesto algunos estudios, se pueden ampliar y facilitar los modos de manipulación de los resultados⁹. Además, algunas de las iniciativas, como Almetric.com, están patrocinadas o financiadas por multinacionales editoriales. Así pues, cabe preguntarse si, lejos de constituir

Analysis Archives», vol. 22, n. 31, 2014, pp. 1-21; M. Ishikawa, *Ranking Regime and the Future of Vernacular Scholarship*, «Education Policy Analysis Archives», vol. 22, n. 30, 2014, pp. 1-24; C. Soudien, *The Influence of Rankings and Incentive Systems on Academic Publishing in South African Universities*, «Education Policy Analysis Archives», vol. 22, n. 33, 2014, pp. 1-17.

⁸ N. Chomsky, *El trabajo académico, el asalto neoliberal a las universidades y cómo debería ser la educación*, «Sociólogos. Blog de Sociología y actualidad», marzo 13, 2014, <<http://sociologos.com/2014/03/13/noam-chomsky-el-trabajo-academico-el-asalto-neoliberal-a-las-universidades-y-como-deberia-ser-la-educacion/>> (accessed: March 27, 2015).

⁹ Sobre este último asunto véase: E. Delgado López-Cózar, N. Robinson-García, D. Torres-Salinas, *The Google Scholar Experiment: how to index false papers and manipulate bibliometric indicators*, «Journal of the Association for Information Science and Technology», vol. 65, n. 3, pp. 446-454.

alternativas al sistema imperante, son más bien conatos de rebeliones en la granja, al más puro estilo orwelliano.

Sea como fuere, la gestión, catalogación e impacto de revistas académicas son asuntos que suscitan el interés – aunque sólo sea por instinto de conservación – de editores de todas las regiones geopolíticas en las que los programas neoliberales de ciencia, cultura y educación han arraigado o lo están haciendo¹⁰, donde las agencias de calificación científica y las multinacionales editoriales, en peligroso maridaje, marcan los estilos y delimitan los intereses de investigación de científicos e intelectuales. Esto es que la ciencia, a pesar de la revolución tecnológica y de la gran ola de democratización del conocimiento que ésta generó, es menos libre, pero más segura, aunque no por ello de mejor género.

2. *Las revistas de historia de la educación hoy. Una panorámica*¹¹

La primera publicación periódica de índole científica dedicada explícitamente a los aspectos históricos de la educación nació en Estados Unidos en 1951 con el nombre «Journal of Philosophy & History of Education». Durante las cuatro siguientes décadas, a un ritmo más o menos constante, hasta un total de once cabeceras, surgieron en Reino Unido (dos en 1961, una en 1968, dos en 1972), Estados Unidos (una en 1973, y otra en 1981), Francia (1979), Italia (1982), España (1982) y Canadá (1989) algunos de los proyectos editoriales que, en la actualidad, gozan de prestigio y reconocimiento académico entre los historiadores de la educación.

A partir de entonces, especialmente durante la segunda mitad de la década de 1990, las vías, formas y modos de comunicación científica comenzaron a multiplicarse, los focos de irradiación a dispersarse geográficamente, cobrando protagonismo Iberoamérica y la Europa mediterránea, y los modelos de gestión editorial a hacerse más complejos, tal como se ha reseñado anteriormente. Todo

¹⁰ Una pequeña muestra del interés *global* por estas cuestiones se pueden hallar en: M. Cabrera-Flores, E. Luna-Serrano, G. Vidauri, *Las revistas mexicanas de investigación educativa rumbo a la corriente principal de difusión de la ciencia*, «RELIEVE», vol. 20, n. 2, 2014, pp. 1-27; C.P. Chou, *The SSCI Syndrome in Taiwan's Academia*, «Education Policy Analysis Archives», vol. 22, n. 29, 2014, pp. 1-19; J.E. Delgado Troncoso, *Scientific Journals of Universities of Chile, Colombia, and Venezuela: Actors and Roles*, «Education Policy Analysis Archives», vol. 22, n. 34, 2014, pp. 1-24; M. Ruiz-Corbella, A. Galán, A. Diestro, *Las revistas científicas de Educación en España: evolución y perspectivas de futuro*, «RELIEVE», vol. 20, n. 2, 2014, pp. 1-27.

¹¹ Bajo este epígrafe se exponen algunos de los primeros resultados de la investigación que los autores de este artículo están realizando, que tiene como propósito contribuir a los esfuerzos desarrollados, entre otros, por el Standing Working Group «Mapping the Discipline History of Education» de la International Standing Conference on the History of Education (ISCHE). En el Anexo 1 se presenta una relación de las revistas sobre las que se sustentan estas consideraciones.

lo cual era – y sigue siendo – síntoma, entre otras cosas, al menos en la cultura occidental, de los avances epistemológicos y metodológicos en la disciplina Historia de la Educación, de la transformación de parte de la cultura científica y de la irrupción y progresiva generalización de las más novedosas tecnologías de la información, que han contribuido notablemente a la descentralización y democratización de la producción y difusión científicas. Así, durante el último cuarto de siglo, han surgido en distintas regiones un número considerable de revistas de Historia de la Educación: Italia (1994, 1997, 2006), España (1994, 1997, 1998, 2009, 2012, 2014, dos en 2015), Colombia (1995, dos en), Argentina (1996), Brasil (1997, dos en 2001, 2002), Francia (1998), Venezuela (1998), Canadá (2000), Reino Unido (2002), Estados Unidos (2008), Chile (2013), México (2013), Suecia (2014). Lo cual ha ido acompañado, al menos en los últimos cinco años, de un incremento del número de papers publicados, lo que invita a pensar que, efectivamente, los proyectos editoriales más recientes responden a las necesidades de comunicación de la comunidad de historiadores de la educación¹².

Tabla 1. Evolución de papers publicados en revistas de Historia de la Educación América, Europa y Oceanía (2010-2014). Fuente: elaboración propia a partir de los datos disponibles vía Internet

AÑO	2014	2013	2012	2011	2010	TOTAL
Nº ARTS.	664	763	782	744	731	3684

Los modelos de gestión editorial vigentes, a pesar de las múltiples y variadas peculiaridades, presentan algunos rasgos comunes. Salvo contadas excepciones, las revistas han asumido que, para existir, deben acomodarse a las buenas prácticas editoriales. Así también que sus contenidos han estar disponibles online, lo cual no obsta para que varias de ellas continúen publicando los números en papel. En algunos casos, esto constituye para el proyecto editorial una señal de identidad irrenunciable que, de alguna manera, le confiere cierto valor añadido. Pero también determina aspectos del modelo de gestión editorial, entre los que destaca el tipo de acceso a los papers. Mientras que las revistas netamente electrónicas se adhieren a la filosofía open-access, aquellas otras se ven casi obligadas a la modalidad fee-access o a soportar un «periodo de embargo», de forma que las elevadas suscripciones a las que deben hacer frente las instituciones de educación superior y los centros de investigación no pierdan

¹² Obsérvese que en 2014 España es la responsable de cerca del 17% e Italia del 11%, aproximadamente, de las revistas de Historia de la Educación que han sido objeto de este estudio, y entre las dos regiones suman el 26%, aproximadamente, de los *papers* publicados entre 2010 y 2014.

su sentido. La periodicidad varía de un caso a otro, oscilando entre uno y seis números al año, con predominancia del carácter semestral. Por último, las principales entidades editoras son las universidades (U), que impulsan, directa o indirectamente, veintidós revistas, seguidas de las sociedades científicas (SS), que lo hacen con dieciséis, las casas editoriales (E) con once y las administraciones públicas (PA) con una.

Tabla 2. Modelos de gestión editorial de revistas de Historia de la Educación América, Europa y Oceanía en función de la entidad editora. Fuente: elaboración propia a partir de los datos consignados en el Anexo 1

U+SS	U+E	U	SS+E	SS	PA	E
5	2	15	3	8	1	6

Por último, cabe preguntarse cuál es la situación de las revistas de Historia de la Educación en la trama internacional de rankings e impact factor. En estos momentos, diciembre de 2014, de las cuarenta revistas que han sido fuente de este estudio, únicamente dos figuran en JCR, siete – incluidas estas últimas – en SJR, cinco de ellas de Reino Unido, y tres en Scielo. Pero, ¿qué ocurre en España e Italia? Ninguna revista se halla en JCR, sólo dos han logrado entrar en otros ranking internacionales, la revista italiana «History of Education & Children's Literature» en SJR, y la española «Historia de la Educación. Revista Interuniversitaria» en ERIH¹³. Italia se encuentra en pleno proceso de elaboración de un sistema propio de evaluación de la calidad editorial de las revistas científicas. España, por su parte, cuenta, actualmente, con una herramienta para estimar el impacto de éstas en la comunidad académica, la ya aludida FECYT, cuyo sello de calidad no ha conseguido obtenerlo ninguna.

3. «Espacio, Tiempo y Educación»: ideas, realizaciones y propósitos

Tras largos meses de intenso trabajo y numerosas conversaciones, en febrero de 2014 vio la luz el primer número de la revista «Espacio, Tiempo

¹³ Conviene matizar estos datos y, en todo caso, tomarlos con cautela. En primer lugar, hay que recordar que Scielo es un proyecto orientado hacia el ámbito iberoamericano, por lo que algunas publicaciones, de suyo, no pueden participar. En segundo término, únicamente se disponen de los datos de ERIH de 2011 referidos a España, obtenidos de: F.M. Aliaga, G. Almerich, J.M. Suárez-Rodríguez, *El European Reference Index for the Humanities (ERIH) como criterio de calidad de las revistas académicas: análisis de la lista revisada de educación*, «Revista española de Documentación Científica», vol. 36, n. 2, 2013, pp. 1-9. La razón de esto último es que, debido a que recientemente ERIH se ha transformado en ERIH+, no es posible acceder a los informes íntegros de 2011 y aún no se han elaborado los de la convocatoria de 2014.

y Educación», una publicación electrónica semestral de Historia de la Educación abierta e independiente, blind peer review, editada por FahrenHouse (Salamanca, España), adherida a la filosofía open-access y a los acuerdos éticos internacionales consignados en el COPE. Y cuya actividad se orienta por los principios de libertad de ciencia y trabajo responsable, crítica y reflexión, comunicación y colaboración internacionales.

El título de esta revista surgió del convencimiento de que espacio y tiempo son variables que definen y determinan, en gran medida, la realidad, marcan todos los elementos de ésta, condicionan las posibilidades y trayectorias de personas y sociedades, también las del pensamiento, la ciencia, la tecnología y cuantas otras manifestaciones de razón, libertad y utopía; y la educación, genuina del ser humano, no es ajena a tales influjos: es un factor histórico y presente que es, al tiempo, condicionante y condicionado en el curso de aquéllos. Y esta idea sencilla, pero potente, es la que, en gran medida, alimenta y da sentido al proyecto editorial de «Espacio, Tiempo y Educación», cuyo propósito fundamental es examinar la educación en todas sus formas y modos, en cualesquiera espacio y tiempo, prestando especial atención a cuestiones que, por el momento, han sido escasamente atendidas, merecen más y mejores aportaciones o requieren una revisión crítica por parte de la comunidad internacional de historiadores de la educación.

Otro de los pilares sobre los que se sustenta la actividad de «Espacio, Tiempo y Educación» es el carácter decididamente internacional que se procura que impregne todo. Y es que, con este proyecto editorial se pretende, por un lado, contribuir al fortalecimiento de las redes de colaboración y comunicación internaciones ya existentes y, por otro, crear otras que las complementen y amplíen, con el ánimo de facilitar el tránsito de ideas, criterios y pareceres y de hacer de la Historia de la Educación algo más libre, vivo, dinámico e conectado. Sirvan como botón de muestra de tales empeños los siguientes cuatro aspectos: la diversidad de procedencia de los autores y de las personas que integran el Comité Científico, compuesto por treinta y nueve especialistas en Historia de la Educación, adscritos a treinta y cinco universidades diferentes, repartidas por veintiún países distintos; la variedad de regiones geográficas en las que se focalizan los estudios publicados; se admiten originales en español, francés, inglés, italiano y portugués; las informaciones contenidas en la web están disponibles en estos mismos cinco idiomas.

La tercera clave del proyecto es el empeño del equipo editorial por estar a la altura de nuestro tiempo. Razón, entre otras, por la que se han asumido como propios los estándares internacionales de buenas prácticas editoriales y las técnicas de gestión de revistas electrónicas actuales. Poco a poco, los esfuerzos invertidos en las labores de indexación y marketing van dando resultados. Por un lado, se ha logrado incluir la revista en algunas bases de datos, repertorios y catálogos internaciones, como son EBSCO Host, CNIK-Scholar, DOAJ, DRJI, MIAR, OAJI, DIALNET, Google Scholar y CiteFactor. Por otro, se han abierto

canales complementarios para la difusión de artículos, call for papers y reuniones científicas organizadas, adoptando algunos de los social media más extendidos entre la comunidad científica, como son Facebook, Twitter y Academia.edu, que contribuyen notablemente a la internacionalización de la comunicación científica. Así, una vez que un número es publicado, se envía la información a los autores y a los centros de catalogación e indexación, al tiempo que se da noticia del mismo a través de las redes de comunicación científica al uso y de los social media, primero del número completo, destacando, si es el caso, el tema monográfico, y luego, de forma analítica y a intervalos de dos o tres días, de cada uno de los trabajos que conforman el número; todo con el ánimo de ampliar y facilitar las vías de acceso a los trabajos publicados y de ponerlos a disposición de los interesados en el menor plazo de tiempo posible. Por vía de estos últimos medios «Espacio, Tiempo y Educación» colabora en la difusión de novedades editoriales de otras revistas y de informaciones relativas a eventos científicos de Historia de la Educación.

Por el momento, se han publicado dos números. El vol. 1, n. 1, enero-junio 2014 tuvo carácter monográfico. Fue editado por Antonella Cagnolati (Università di Foggia, Italia) y estuvo dedicado a «Autobiografía, mujeres y educación en la Europa Mediterránea (siglos XIX-XX)». En este se ha ahondado, de la mano de investigadores de España e Italia, en el valor intrínseco de la autobiografía, no ya como valor metahistórico y dirigido a la conformación de una identidad nacional, sino como un ejercicio de introspección, algo de carácter más íntimo, propicio para el encuentro de las mujeres consigo mismas. Concretamente, el leiv motiv que articuló el monográfico fue la educación en la escritura autobiográfica de las mujeres, para lo cual se tomaron como muestra los casos de Ida Baccini, Laura Orvieto, Federica Montseny, Anna Franchi y Maria Occhipinti. El número lo completó la entrevista a Bianca Pitzorno¹⁴.

El segundo número de 2014, por su parte, ha sido de carácter misceláneo. Constó de un ensayo-editorial, una entrevista a Rosa Bruno-Jofré y seis artículos a cargo de autores procedentes de Argentina, Canadá, España, Italia y Portugal. Los temas que se abordaron fueron variados: la educación durante la transición

¹⁴ A. Cagnolati, *Vidas en el espejo. La educación en la escritura autobiográfica de las mujeres. Presentación*, «Espacio, Tiempo y Educación», vol. 1, n. 1, 2014, pp. 15-30; M. Caiazzo, *Realidad y ficción de una educadora del pueblo. Estudio de la misión pedagógica de Federica Montseny a través de sus autobiografías*, «Espacio, Tiempo y Educación», vol. 1, n. 1, 2014, pp. 77-96; L. Cantatore, «Un'identità femminile moderna». *L'autobiografia di Ida Baccini*, «Espacio, Tiempo y Educación», vol. 1, n. 1, 2014, pp. 31-54; R. Caso, «Detrás de cada cara hay un destino, detrás de cada imagen una historia»: *un retrato de Bianca Pitzorno, entre literatura y autobiografía*, «Espacio, Tiempo y Educación», vol. 1, n. 1, 2014, pp. 135-152; C. Del Vivo, *Costruirsi una storia: miti e realtà nell'autobiografia di Laura Orvieto*, «Espacio, Tiempo y Educación», vol. 1, n. 1, 2014, pp. 55-75; L. Gigli, *Latino e calza. Educazione ed esperienze biografiche ne «La mia vita» di Anna Franchi*, «Espacio, Tiempo y Educación», vol. 1, n. 1, 2014, pp. 97-113; M. Martín Clavijo, *Un modelo de libertad femenino: «Una donna libera» de Maria Occhipinti*, «Espacio, Tiempo y Educación», vol. 1, n. 1, 2014, pp. 115-132.

portuguesa a la democracia, aspectos de la enseñanza secundaria en Argentina, la educación colonial en Mozambique, el aprendizaje del italiano en la segunda enseñanza española durante el fascismo italiano, la proyección internacional de la Universidad de Salamanca durante el franquismo, el estado del arte de la historia de la infancia, la educación y las instituciones educativas en Rusia tras la perestroika, así como algunas cuestiones de historiografía¹⁵.

Actualmente, están en distintas fases de preparación los monográficos de los cuatro siguientes números. El primero de éstos, de inminente aparición en el vol. 2, n. 1, enero-junio 2015, ha sido coordinado por Martha Rodríguez (Universidad de Buenos Aires, Argentina) y versa sobre «Libros de texto y sociedades: entre didáctica, política, cultura y mercado». En total se han admitido para su publicación diez artículos, que analizan cuestiones varias relacionadas con la manualística en una perspectiva histórica: los libros de texto como objeto de estudio; el estado del arte de la producción científica sobre manualística escolar en Argentina durante la última década; los contenidos políticos e ideológicos de estos materiales durante el peronismo; las representaciones actuales en las escuelas primarias argentinas de la resistencia de los pueblos originarios ante la conquista española contenidas en los mismos, de la última dictadura militar brasileña en las narrativas didácticas y de la guerra civil española en los textos de ciencias sociales vigentes en España entre 1970 y 1990; elementos de la enseñanza de las ciencias naturales en Portugal durante la primera mitad del siglo XX; la cultura pedagógica de los manuales de las escuelas normales italianas del siglo XIX; la construcción de la historia nacional a través de ensayos y libros destinados a la formación de maestros de escuela primaria italiana durante la Segunda Guerra Mundial; las estrategias para acceder a los puntos ciegos del dispositivo de sexualidad en los libros de lectura infantil de Colombia y España entre 1900 y 1960. Por su parte, la sección miscelánea alberga cinco trabajos originales que indagan en aspectos aún por explorar de las escuelas primarias de orientación agrícola de la España

¹⁵ F. Acosta, *Entre procesos globales y usos locales: análisis de categorías recientes de la historia de la educación para el estudio de la escuela secundaria en la Argentina*, «Espacio, Tiempo y Educación», vol. 1, n. 2, 2014, pp. 23-37; D. Caroli, *New Trends in the History of Childhood, Education and School Institutions in Post-Communist Russia (1986-2012)*, «Espacio, Tiempo y Educación», vol. 1, n. 2, 2014, pp. 133-169; R. Domínguez Méndez, *El aprendizaje del italiano en la segunda enseñanza española. Una batalla de la diplomacia fascista (1922-1943)*, «Espacio, Tiempo y Educación», vol. 1, n. 2, 2014, pp. 65-87; S. González Gómez, *Proyección e internacionalización de los estudios en la Universidad española del franquismo. Revisión de la realidad de la Universidad de Salamanca*, «Espacio, Tiempo y Educación», vol. 1, n. 2, 2014, pp. 89-112; J. Igelmo Zaldívar, P. Quiroga Uceda, *Levantando el velo de la historia de la educación. Un acercamiento a la trayectoria, el pensamiento y la obra de Rosa Bruno-Jofré*, «Espacio, Tiempo y Educación», vol. 1, n. 2, 2014, pp. 173-198; J. Pintassilgo, *A Educação em tempos de Revolução (nos 40 anos da Revolução do 25 de Abril de 1974 em Portugal)*, «Espacio, Tiempo y Educación», vol. 1, n. 2, 2014, pp. 13-19; S. Schoo, *Conflictos y acuerdos en el proceso de nacionalización de la educación secundaria en Argentina en el siglo XIX. El caso de la provincia de Buenos Aires*, «Espacio, Tiempo y Educación», vol. 1, n. 2, 2014, pp. 113-131.

franquista, las actividades sociales y culturales de la Residencia de Señoritas durante la Segunda República española, la revolución en el seno de la familia burguesa durante el romanticismo, las reformas de la instrucción primaria acometidas en Brasil durante el siglo XIX y aspectos de las escuelas elementales y secundarias en Francia en las postrimerías de la Edad Media. El número cuenta, asimismo, con un ensayo-editorial y una entrevista a Giorgio Chiosso. La procedencia geográfica de los autores de las diecisiete contribuciones que conforman esta entrega de «Espacio, Tiempo y Educación» es, nuevamente, variada: Argentina, Brasil, Colombia, España, Italia, Portugal y Reino Unido.

La sección monográfica del vol. 2, n. 1, julio-diciembre 2015, editada por Sara González Gómez (Universitat de les Illes Balears, España), afrontará un asunto de gran calado que, por ahora, ha sido escasamente atendido, como es «Universidad y Transiciones a la Democracia en la Europa mediterránea e Iberoamericana (1970-1980)». Ya se cuentan con algunas contribuciones de historiadores de la educación de Argentina, Brasil, Chile, España, Grecia, Portugal y Uruguay, que abordan cuestiones de política educativa universitaria, los fenómenos de democratización de las instituciones de Educación Superior, los debates ideológicos desarrollados en el seno de las mismas, la evolución de los planes de estudio, las movilizaciones estudiantiles, etc., durante la llamada tercera ola de transiciones a la democracia que acontecieron en la Europa mediterránea e Iberoamérica.

Los monográficos de siguientes números, aunque lejanos en el horizonte, ya están en marcha. El correspondiente al vol. 3, n. 1, enero-junio 2016, coordinado por Simonetta Polenghi (Università Cattolica de Milano, Italia) y Gianfranco Bandini (Università di Firenze, Italia), lleva por título «La Historia de la Educación ante sí misma», y tiene como propósito contribuir de forma transnacional e internacional al debate epistemológico en torno a la Historia de la Educación, proporcionar algunas respuestas a la pregunta ¿qué es la Historia de la Educación hoy?, así también apuntar ideas y dibujar posibles trayectorias para la disciplina. Y el del vol. 3, n. 2, julio-diciembre 2016, cuyo encargo editorial ha sido asumido por Luciana Bellatalla (Università di Ferrara, Italia), tendrá por objeto el estudio, con motivo del centenario de la publicación de la obra *Democracia y Educación*, la metamorfosis de las ideas sobre educación de John Dewey, la recepción de éstas en países del entorno europeo y americano y las formas de materializarse.

«Espacio, Tiempo y Educación» pretende ser algo más que una revista, razón por la cual también contempla en su quehacer la organización y promoción de encuentros y reuniones científicas. La finalidad es crear espacios para la difusión de las más recientes y originales aportaciones a la Historia de la Educación y para la divulgación científica de los mismos que, en todo caso, propicien la reflexión y el debate riguroso, el tránsito desenfadado de ideas y pareceres, así como el establecimiento de lazos internacionales de solidaridad y cooperación científicas que amplíen las perspectivas de análisis y enriquezcan los discursos

de la disciplina. Así, se han programado dos actividades para el año 2015. La primera es el Jornada de Estudio sobre «Educación y Emancipación de la Mujer en Europa e Iberoamérica: Perspectiva Histórica» (Facultad de Educación de Palencia. Universidad de Valladolid, España, 24 febrero 2014), en la que participarán investigadoras de Brasil, España, Grecia, Italia y Polonia.

La segunda actividad es el I Simposio de Historia de la Educación, que tiene por lema «La Pedagogía ante la Muerte: Reflexiones e interpretaciones en perspectivas histórica y filosófica» (Facultad de Filosofía de la Universidad de Valladolid, España, 26-27 febrero 2015) y como objetivos ahondar en asuntos tales como: la dinámica de las cuestiones éticas relacionadas con la buena muerte en el pasado y la necesidad de una preparación, secular o religiosa, en el curso de la vida; la normalización de los espectáculos de la muerte en los medios de comunicación y los dilemas éticos y emocionales que esto acarrea; el papel de la pedagogía – en sus vertientes filosófica, antropológica y didáctica – ante la muerte colectiva, independientemente de sus causas; la idea de educar a los seres humanos para el duelo y la pérdida; el problema de la hipertecnologización de la muerte en la modernidad y la posmodernidad; las formas de deconstruir el tabú de la muerte, cuya separación del mundo de los vivos la convierte en un topos; el modo en que la pedagogía, al menos en su vertiente más humanista, afronta su propia extinción y es progresivamente suplantada por la técnica de la educación. Las contribuciones recibidas tienen distinta procedencia: España, Italia, Portugal, Grecia, Polonia, Brasil y Francia.

En el marco de este Simposio se desarrollará un «Workshop de Revistas de Historia de la Educación» tiene como propósito abrir otro espacio más para el trabajo, la reflexión y el debate, para conocer el punto de vista de los editores acerca de las posibilidades y los retos de las revistas académicas, así como contribuir a los esfuerzos en curso para cartografiar la producción científica en Historia de la Educación. Para lo cual se ha convocado a editores de revistas de Historia de la Educación de la Europa mediterránea e Iberoamérica. Entre los asuntos que se tratarán se cuentan los siguientes: la influencias de los modelos de gestión editorial en las formas y estilos de producción científica; el papel de las redes sociales para la difusión de los avances, novedades y resultados de las revistas; la revisión crítica de las fórmulas imperantes de evaluación de la calidad editorial; el reconocimiento de la gestión editorial en las agencias de evaluación de la actividad de los profesores universitarios; las políticas lingüísticas (monolingüismo/plurilingüismo); el impacto y la presencia de las investigaciones de Historia de la Educación en la docencia universitaria.

Cabe mencionar, finalmente, que ya está proyectado el II Simposio de Historia de la Educación, que tendrá lugar en 2017 en la Università di Ferrara (Italia), bajo el título – aún provisional – «Las Metamorfosis de las Teorías de la Educación: Reflexiones e interpretaciones en perspectivas histórica, filosófica y transnacional». Pero esto es otra historia.

4. *Consideraciones finales*

Dada la coyuntura, «Espacio, Tiempo y Educación» deberá afrontar algunos retos a medio plazo, que no difieren de los de cualquier otra revista de Historia de la Educación y, por extensión, de Ciencias de la Educación. Lo fundamental es que los equipos editoriales sigan invirtiendo sus mejores esfuerzos en mantener la originalidad, la solidez y el interés científico de los trabajos publicados, sin lo cual todo lo demás pierde su sentido. El segundo término, las publicaciones que ya están en el circuito de los rankings e impact factor deberán mantener el nivel para continuar ahí, y aquellas que aún no lo han logrado habrán de buscar estrategias que aumenten los índices de popularidad y favorezcan el ingreso en aquél, lo que pasa, en todo caso, por adoptar los estándares internacionales de buenas prácticas editoriales, incorporar los social media a sus cauces habituales de comunicación y difusión y llevar a cabo una meticulosa labor de indexación. Como consecuencia de esto último, además de ciertas habilidades técnicas, se exigirá a los equipos editoriales una coordinación y cooperación más intensas y fluidas. Por último, será preciso trabajar y colaborar con otras revistas para tejer una cada vez más amplia red internacional de comunicación y colaboración y, por ejemplo, para reivindicar el reconocimiento, como mérito de peso, por parte de las agencias de evaluación de la calidad de la investigación de los profesores universitarios las labores de gestión editorial y para reclamar a esas mismas agencias que la valía de las aportaciones científicas sea estimada por algo más que el lugar que ocupa una revista en unos rankings elaborados por empresas privadas; esto urge especialmente en el caso de España.

*Anexo 1: Revistas de Historia de la Educación*¹⁶

«American Educational History Journal», Midwest History of Education Society, 1973, fee-access, 2 issues / year

¹⁶ El elenco de cuarenta revistas de Historia de la Educación conviene manejarlo teniendo en cuenta tres consideraciones. La primera es que las áreas geopolíticas objeto de estudio se circunscriben únicamente a América, Europa occidental y Oceanía. La segunda, que el criterio para la selección de fuentes ha sido la especificidad histórico-educativa del proyecto editorial, viéndonos obligados a descartar numerosas publicaciones que prestan especial atención a estas cuestiones, pero que no son estrictamente de la disciplina científica. La tercera, por último, es que los datos se han obtenido vía Internet, fundamentalmente de las web oficiales de las revistas, por lo que la fiabilidad de los mismos está supeditada a la fiabilidad de la información ahí contenida; es preciso señalar que, en diciembre de 2014, quince revistas aún no han actualizado su información, y hay casos aislados en los que estos no se ha hecho desde 2012. Rogamos, asimismo, que el lector disculpe cualquier olvido u omisión, pues en ningún caso ha sido de forma deliberada; y agradeceríamos encarecidamente cualquier información que ayude a enriquecer el elenco de revistas *occidentales* de Historia de la Educación que aquí se presenta.

- «Annali di Storia dell'educazione e delle Istituzioni Scolastiche», Editrice La Scuola & Università Cattolica di Milano e Brescia, Italy, 1994, fee-access, 1 issue / year
- «Annali di Storia delle Università italiane», Centro Interuniversitario per la Storia delle Università Italiane, Italy, 1997, fee-access, 1 issue / year
- «Cabás. Revista digital sobre Patrimonio Histórico Educativo», Centro de Recursos, Interpretación y Estudios de la Escuela, Spain, 2009, open-access, 2 issues / year
- «Cadernos de História da Educação», Universidade Federal de Uberlândia, Brasil, 2002, open-access, 2 issues / year
- «CIAN-Revista de Historia de las Universidades», Universidad Carlos III de Madrid, Spain, 1998, open-access, 2 issues / year
- «Cuadernos Chilenos de Historia de la Educación», Sociedad Chilena de Historia de la Educación, Chile, 2013, open-access, 1 issue / year
- «Educació i Història: Revista d'Història de l'Educació», Societat d'Història de l'Educació dels Països de la Llengua Catalana, Spain, 1994, open-access / fee-access, 2 issues / year, ANEP + In-Recs
- «Encounters on Education», Queen's University, Canada, 2000, open-access, 1 issue / year
- «Espacio, Tiempo y Educación», FahrenHouse, Spain, 2014, open-access, 2 issues / year
- «Heuristica. Revista Digital de Historia de la Educacion», Universidad de Los Andes, Venezuela, 1998, open-access, 1 issue / year
- «Histoire de l'éducation», ENS Éditions, France, 1979, fee-access, 4 issues / year, SJR
- «História da Educação / History Education», Universidade Federal do Rio Grande do Sul, Universidade Federal de Santa Maria & Associação Sul-Rio-Grandense de Pesquisadores em História da Educação - Asphe/RS, Brasil, 1997, open-access / fee-access, 3 issues / year, Scielo
- «Historia de la Educación Colombiana», Universidad de Nariño-Rudecolombia, Colombia, 1998, open-access, 1 issue / year
- «Historia de la Educación. Anuario», Sociedad Argentina de Historia de la Educación, Argentina, 1996, open-access, 2 issues / year, Scielo
- «Historia de la Educación. Revista Interuniversitaria», Ediciones Universidad de Salamanca, Spain, 1982, open-access / fee-access, 1 issue / year, ERIH + ANEP + In-Recs
- «Historia Social y de la Educación», Hipatia Press, Spain, 2012, open-access, 3 issues / year

- «Historia y Memoria de la Educación», Universidad Nacional de Educación a Distancia & Sociedad Española de Historia de la Educación, Spain, 2015, open-access, 2 issues / year
- «Historical Studies in Education / Revue d'histoire de l'éducation», Canadian History of Education Association, Canada, 1989, open-access, 2 issues / year
- «History of Education», History of Education Society & Taylor & Francis, UK, 1972, fee-access, 6 issues / year, JCR + SJR
- «History of Education & Children's Literature», Università di Macerata, Italy, 2006, fee-access, 2 issues / year, SJ
- «History of Education Issues», Greek Society of Education Historians, Greece, 2002, open-access, 1 issue / year
- «History of Education Quarterly», Wiley, UK, fee-access, 4 issues / year, SJR
- «History of Education Researcher», History of Education Society, UK, 2002, fee-access, 2 issues / year
- «History of Education Review», Emerald Group Publishing & Australian and New Zealand History of Education Society, Australia / UK, 1972, fee-access, 2 issues / year, SJR
- «Journal of Educational Administration and History», Taylor & Francis, UK, 1968, fee-access, 4 issues / year, SJR
- «Journal of Philosophy & History of Education», Society of Philosophy and History of Education, USA, 1951, open-access / fee-access, 1 issue / year
- «Journal of the History of Childhood and Youth», Johns Hopkins University Press, USA, 2008. open-access, 3 issues / year
- «Nordic Journal of Educational History», Umeå University & Uppsala University, Sweden, 2014, open-access, 2 issues / year
- «Nuovo Bollettino C.I.R.S.E», Centro Italiano per la Ricerca Storico-Educativa, Italy, 1982, fee-access, 2 issues / year
- «Paedagogica Historica», International Standing Conference on the History of Education & Taylor & Francis, UK, 1961, fee-access, 6 issues / year, JCR + SJR
- «Perspectives on the History of Higher Education», Pennsylvania State University & Transaction Publishers, USA, 1981, fee-access, 1 issue / year
- «Revista Brasileira de História da Educação», Sociedade Brasileira de História da Educação & Universidade Estadual de Maringá, Brasil, 2001, open-access, 3 issues / year
- «Revista HISTEDBR On-Line», Universidade Estadual de Campinas, Brasil, 2001, open-access, 6 issues / year
- «Revista Historia Caribe», Universidad del Atlántico, Colombia, 1995, open-access, 2 issues / year

- «Revista Historia de la Educación Latinoamericana», Sociedad de Historia de la Educación Latinoamericana & Universidad Pedagógica y Tecnológica de Colombia, Colombia, 1998, open-access, 2 issues / year
- «Revista Mexicana de Historia de la Educación», Sociedad Mexicana de Historia de la Educación, Mexico, 2013, open-access, 2 issues / year
- «Revue d'histoire de l'enfance irrégulière - Le Temps de l'histoire», Centre national de formation et d'études de la protection judiciaire de la jeunesse & Association pour l'histoire de l'éducation surveillée et de la protection judiciaire des mineurs, France, 1998, open-access, 1 issue / year
- «Sarmiento: anuario galego de historia da educación», Universidad de Santiago de Compostela, Spain, 1997, open-access / fee-access (print), 1 issue / year, ANEP + In-Recs
- «Theorós. Revista de pensamiento y educación», FahrenHouse, Spain, 2015, open-access, 2 issues / year

Anexo 2: Ficha de catalogación de «Espacio, Tiempo y Educación»

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Revista «História da Educação» da ASPHE/RS (Brasil): compartilhando estudos e pesquisas desde 1997

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The Journal «História da Educação» of the ASPHE/RS (Brazil): sharing studies and research since 1997

ABSTRACT: This paper presents data on the history of the Sul-Rio-Grandense Association of Researchers on History of Education (Asphe) its foundation and activities between 1995. It also analyzes the Annals of the events that took place during that period and the journal History of Education, which has been published since 1997. Such publications are

considered important spaces for the socialization of research, historiographic production and important debates on the field of historical investigation.

EET-TEE KEYWORDS: Periodical; History of Education; Research Method; Groups and Organizations; Brazil; XX-XXI Centuries.

Introdução

A revista «História da Educação» é mantida pela Associação Sul-Rio-Grandense de Pesquisadores em História da Educação (Asphe/RS) com o apoio da Universidade Federal do Rio Grande do Sul, da Universidade Federal de Santa Maria e da Pontifícia Universidade Católica do Rio Grande do Sul.

A Asphe foi a primeira associação de pesquisadores em história da educação a se constituir no Brasil, em 1995, com o objetivo de incentivar e realizar a pesquisa e a divulgação na área de história da educação, prioritariamente do Rio Grande do Sul, congregar os pesquisadores e os estudiosos na área e manter intercâmbio com entidades congêneres. Além dos pesquisadores de diversas instituições de ensino superior do Rio Grande do Sul, integra pesquisadores de outros Estados brasileiros. Atualmente conta com, aproximadamente, 100 associados e realiza encontros anuais com temática e sede escolhida em Assembléia Geral, com indicação prévia de pesquisadores de outros Estados para comporem mesas-redondas. Para cada evento são publicados anais dos trabalhos apresentados nas sessões de comunicação das pesquisas. Cada encontro privilegia uma ou duas temáticas para as conferências, painéis, mesas-redondas ou mini-cursos.

«História da Educação»: *compartilhando estudos e pesquisas*

«História da Educação» foi a primeira revista brasileira especializada no gênero. O número inaugural foi lançado em 28 de abril de 1997, por ocasião do primeiro encontro da Associação Sul-Rio-Grandense de Pesquisadores em História da Educação, ocorrido em São Leopoldo/RS. É uma publicação seriada que se apresenta na forma de revista, com periodicidade quadrimestral e publicada em formato online e impresso. Até 2006 editavam-se dois números anuais, em abril e setembro, com um número médio de 200 páginas e com tiragem de 500 exemplares, que eram distribuídos para bibliotecas de instituições de ensino superior nacionais e internacionais. Os demais exemplares eram enviados aos associados e destinados para o sistema de assinaturas, doações ou permutas. A partir de 2007 a periodicidade da revista passou a ser quadrimestral. Cabe

destacar que a revista é custeada pela Asphe/RS, com recursos provenientes dos eventos anuais e das anuidades dos associados.

A revista está hospedada no portal de periódicos da Universidade Federal do Rio Grande do Sul, no endereço <<http://seer.ufrgs.br/asphe>>, com disponibilização gratuita na web, para que os usuários possam ler, fazer download, copiar, distribuir, imprimir, pesquisar ou referenciar o texto integral dos documentos, processá-los para indexação, utilizá-los como dados de entrada de programas para softwares, ou usá-los para qualquer outro propósito legal, sem barreira financeira, legal ou técnica.

Tem como cobertura temática a área de história da educação e por missão constituir-se num veículo de divulgação de estudos do campo historiográfico educacional. Objetiva, sobretudo, divulgar resultados de pesquisas, dissertações de mestrado ou teses de doutorado defendidas em programas nacionais ou estrangeiros, por professores e estudantes de graduação e pós-graduação. O conselho editorial é composto de pesquisadores nacionais. Conselho editorial internacional é integrado por Adrian Ascolani (Universidad Nacional de Rosario, Argentina); Antonio Castillo Gómez (Universidade de Alcalá, Espanha); Antonio Viñao Frago (Universidad de Murcia, Espanha); Joaquim Pintassilgo (Universidade de Lisboa, Portugal); Luís Miguel Carvalho (Universidade Técnica de Lisboa, Portugal); Pierre Caspard (Service d'Histoire de l'Éducation, França).

São aceitos para publicação:

- a. artigos relacionados à história e historiografia da educação, originados de estudos teóricos, pesquisas, reflexões metodológicas e discussões em geral, pertinentes ao campo historiográfico;
- b. trabalhos encomendados e traduções;
- c. resenhas, no âmbito das quais se espera a apresentação do conteúdo e comentários acerca de publicações recentes ou obras reconhecidas academicamente;
- d. documentos, materiais considerados importantes e de difícil acesso que possam servir de subsídio para estudos.

Os textos submetidos à revista devem ser inéditos, de autores brasileiros ou estrangeiros, escritos em língua portuguesa ou espanhola. Admite-se a publicação de textos nas línguas inglesa e francesa, desde que acompanhados pela respectiva tradução. O processo de submissão, avaliação, edição e publicação é feito por meio do Sistema Eletrônico de Editoração de Revistas, tradução licenciada do Open Journal Systems (OJS). A normalização do periódico segue padrões estabelecidos pela Associação Brasileira de Normas Técnicas (ABNT). Utiliza-se, como base para transferência de direitos, a licença Creative commons attribution 3.0 para periódicos de acesso aberto, Open Archives Initiative (OAI), categoria green road.

A revista «História da Educação» tem servido como um veículo singular de divulgação de estudos no campo historiográfico educacional e, também,

uma fonte importante de consulta dos pesquisadores da área. Em função desse trabalho a revista tem sido avaliada pela Coordenadoria de Aperfeiçoamento do Pessoal de Ensino Superior/Capes, no Qualis Periódico, desde 2002, com conceito A e classificada como sendo de âmbito nacional. Na última avaliação de 2012 foi classificada como A2.

Vários dossiês já foram publicados, dentre os quais: Memória e história da educação: questões teórico-metodológicas (1997); Pesquisa em história da educação: perspectivas comparadas (2001); O oral, o escrito e o digital em história da educação, integrando o foco do IV Congresso Luso-Brasileiro de História da Educação, realizado em Porto Alegre (2002); Iconografia e pesquisa histórica (2002); Literatura e história da educação; Memória e escritos autobiográficos (2003); História da cultura escolar: escritas e memórias ordinárias (2004); A história da educação na formação do educador (2006); Releituras históricas do ensino secundário (2009); Educação rural (2011); Governo dos professores, governo das escolas: elementos para a história da institucionalização de mestres e alunos (38), Lugares de poder, produção e circulação dos saberes pedagógicos (2013), Escritas estudantis em periódicos escolares (2013), Educação rural (2014).

Em seus 43 números foram publicados 390 artigos, 30 resenhas e 45 documentos inéditos, com a colaboração de 500 autores, dos quais 100 estrangeiros (França, Portugal, Argentina, Estados Unidos, México, Espanha, Canadá, Alemanha, Chile, Colômbia, Itália). A maioria dos autores nacionais está ligada à instituições de ensino superior na condição de professores, pesquisadores, estudantes de programas de pós-graduação. Na perspectiva de internacionalização do periódico, desde o n. 41/2013, os artigos dos autores, nacionais e estrangeiros, são publicados na língua de origem e em português.

Quanto ao recorte temporal dos artigos, constata-se uma centralidade no século 19 (31%) e 20 (60%), sendo ainda limitado o interesse por pesquisas que abarquem outros períodos da história da educação universal e brasileira. São poucos os pesquisadores da área de história da educação que pesquisam o período do Brasil colônia (século 16-18).

Quanto à temática, constata-se uma maior incidência de textos que problematizam a pesquisa na área: aspectos metodológicos, fontes variadas, questões de historiografia. Também tem uma presença significativa estudos sobre a formação e profissão docente, imprensa de educação e ensino; história do livro e práticas de leitura; gênero, etnia, raça, imigração; história das instituições escolares; história da cultura escolar; história da educação rural. A esses temas segue-se uma pluralidade de focos de pesquisa, que evidenciam um olhar multifacetado, confirmado pela variedade de palavras-chave adotadas. No entanto, encontram-se lacunas importantes: história das instituições de ensino superior ou universidades; agremiações e sindicatos discentes e docentes; festas escolares; clubes escolares; estatísticas escolares; manuais e livros didáticos das

disciplinas do currículo; história da adolescência ou juventude; história dos processos educativos de outros setores da sociedade.

Em função desse trabalho pode-se afirmar que os artigos publicados têm colaborado para as discussões historiográficas, seja em relação a novas temáticas e objetos de pesquisa, seja em relação a documentos e as categorias de análise. Os estudos têm, por um lado, recolocado em pauta algumas antigas questões da pesquisa histórica – relação entre história e memória, por exemplo – e, por outro, problematizado e colaborado na construção dos novos objetos de interesse crescente da história da educação – currículo, profissão docente, livros e manuais escolares, leitura, educação e escolas rurais, cultura escolar, imprensa de educação e ensino¹. Destaca-se a contribuição do periódico para o fomento da produção e circulação da pesquisa no campo da história da alfabetização², história da cultura escrita, especialmente das escritas infantis escolares e não escolares.

Considerações finais

A Asphe e a revista «História da Educação» têm sido espaços privilegiados de socialização das pesquisas, de dinamização da produção historiográfica e de importantes debates no campo da investigação histórica. Espaços construídos coletivamente com a participação dos associados, o que confere uma significação histórica singular.

Ao longo desse período o grupo consolidou-se, projetou-se regional, nacional e internacionalmente, constituiu-se como espaço de acolhimento para os iniciantes e como espaço de formação profissional. Na consolidação dessa trajetória, significativa contribuição tiveram os participantes dos programas de pós-graduação em educação e em história, constituindo grupos de pesquisas na área e orientando dissertações e teses.

No Brasil, a consolidação da história da educação como campo de investigação, a partir dos anos 1970, permitiu que avancemos nossas perspectivas de circulação do conhecimento, como condição para o fortalecimento da disciplina e para a conquista de novos espaços de produção de pesquisa. Assim, devemos tentar superar as polarizações entre local, nacional e internacional, individual e coletivo, micro e macro, singular e plural, buscando circular entre

¹ M.H.C. Bastos, *A caixa de pandora: desafios do ensino e da pesquisa em história da educação no Brasil*, em A.G.B. Freitas, L.E.M. Oliveira, J.C. do Nascimento, E.F.C. do Nascimento (edd.), *O ensino e a pesquisa em história da educação*, Maceió, Edufal, 2011, pp. 73-96.

² E. Peres, *A revista História da Educação e a produção no campo da história da alfabetização. Encontro sul Rio-Grandense de Pesquisadores em História da educação*, Anais, Porto Alegre, Asphe, 2005.

os diferentes eixos, com análises mais refinadas, em um esforço de comparação, que partam das singularidades históricas de cada realidade.

Nos seus quase 20 anos de marcante atuação na produção de pesquisas e na reflexão teórico-metodológica do campo da história da educação, a Asphe/RS e a revista «História da Educação» têm sido espaços privilegiados de socialização das pesquisas, de dinamização da produção historiográfica e de importantes debates no campo da investigação histórica. Além disso, tem procurado contribuir para a consolidação da área de história da educação no Brasil e para a ampliação do diálogo internacional, em especial com pesquisadores da América Latina e da Europa, concretizando a perspectiva de internacionalização da pesquisa.

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Anexo: Ficha técnica do periódico

Título	História da Educação
Instituição	Associação Sul-Rio-Grandense de Pesquisadores em História da Educação - Asphe/RS - Brasil
ISSN impresso	1414-3518
ISSN online	2236-3459
Área	Ciências Humanas
Especialidade	Educação
Periodicidade	Quadrimestral
Suporte	Online
Website	http://seer.ufrgs.br/asphe
Ano de criação	1997
Indexadores	Scielo: http://scielo.br/heduc Lantindex: http://www.latindex.unam.mx/buscador/ficRev.html?opcion=1&folio=19560 Redalyc: http://www.redalyc.org/revista.oa?id=3216 Portal de Periódicos da Capes: http://www.periodicos.capes.gov.br Doaj: http://www.doaj.org
Classificação Qualis	2012 - A2
Formas de distribuição	Acesso aberto - OJS - online
Editores	Maria Helena Camara Bastos - PUCRS Maria Stephanou - Ufrgs Claudemir de Quadros - UFSM
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Las revistas científicas en educación ante la exigencia de la sociedad en red

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The scientific educational journals faced with the demands of the network society

ABSTRACT: In a short period of time the editors of journals in the field of social sciences face new forms of management, publication and distribution of their publications. Through a descriptive study this paper reviews the quality indicators that are being imposed worldwide, as well as their contributing improvements and the problems derived from these. Scientific journals of education are a clear example of this evolution, since they face the challenges of digitalization, impact, open access, presence in social networks, internationalization, editing continuity in your own language, etc. in an increasingly competitive environment. Every editor must consider what kind of journal is willing to offer, while responding to the demands of scientific production and demanding reforms of the new editorial context.

EET-TEE KEYWORDS: Periodical; History of Education; Research Method; Information Technology; XX-XXI Centuries.

1. *Hacia un nuevo modelo de gestión editorial*

Desde finales del siglo XX se está viviendo un cambio significativo a la hora de comunicar los avances originados en la investigación. Presionados por las diferentes instancias científicas y gubernamentales, se insta a que la producción científica se transmita de forma rápida y abierta a través de los diferentes canales de difusión existentes. Si en un primer momento, especialmente en el área de las ciencias sociales, se prefería la difusión a partir de la publicación de monografías de investigación, revistas científicas y actas de congresos, en la actualidad el artículo científico – publicado en una revista considerada de impacto – se ha convertido en la referencia indiscutible, erigiéndose en el elemento clave para la difusión de la ciencia y el reconocimiento profesional del personal docente-investigador. Un ejemplo de esta tendencia es la relevancia que la Unión Europea está otorgando a las revistas científicas como canales de difusión de la ciencia¹, apoyándose en las enormes posibilidades que ofrecen las tecnologías digitales y el *Social Media*. Por otro lado, comprobamos que la comunidad académica, especialmente en el área de las ciencias sociales, ha evolucionado en su forma de investigar y publicar, superando los límites originados por la lengua, la cultura o las propias tradiciones e idiosincrasias científicas. Los efectos de la tecnología digital han determinado el proceso de investigación, especialmente en la difusión de los resultados y precisamente en su última fase es donde las revistas científicas cumplen una función indiscutible: la exposición del producto de una investigación – validado por pares – para su difusión entre la comunidad científica².

Los editores de revistas de ciencias sociales han tenido que tomar conciencia del cambio radical producido en los últimos años en la forma de publicación y valoración de las revistas científicas, debido a la imposición de la tradición propia de las ciencias puras y biosanitarias (estructura, empirismo, factor de impacto, etc.). El formato impreso está llamado a desaparecer, lo que está generando un proceso de edición, difusión y evaluación radicalmente diferente. Los editores de revistas ya no solo gestionan la selección y evaluación de los mejores originales, sino que deben incluir entre sus funciones la difusión en todos los nuevos canales de comunicación, para ganar en visibilidad en todo espacio posible, incrementar su impacto y diseñar modelos de negocio que garanticen la sostenibilidad de la publicación.

Por otro lado, estamos viviendo en un sistema permanente de evaluación de la calidad de la investigación desarrollada por agencias de evaluación y

¹ European Union, *Public consultation. Science 2.0 Science in transition. Background document*, Brussels, European Commission, 2014, <http://ec.europa.eu/research/consultations/science-2.0/consultation_en.htm> (accessed: March 15, 2015).

² M. Ruiz-Corbella, A. Galán, A. Diestro, *Las revistas científicas de Educación en España: evolución y perspectivas de futuro*, «RELIEVE», vol. 20, n. 2, 2014, art. M1, doi: 10.7203/relieve.20.2.4361.

empresas privadas. Un elemento clave en este proceso es la publicación de los resultados en revistas de impacto, lo que determinó el cambio radical del mundo editorial: los criterios formales de calidad, contenido, edición, gestión y citación son los indicadores principales por los que es evaluada una revista para su indización en las mejores bases de datos. A esto se añade el necesario impacto de cada artículo, único referente del valor de una publicación. Consecuencia de este comportamiento es el desarrollo de rankings de publicaciones científicas, lo que está condicionando enormemente la dinámica de publicación de los investigadores, que nos conduce a un ámbito cada vez más competitivo, en el que no todas las revistas, tal como ahora las conocemos, tienen cabida, y en el que los editores deberán plantearse qué tipo de revista es la que quieren ofrecer, y si son capaces de responder a las demandas de la producción científica y a las reformas del nuevo contexto editorial³.

2. *La adaptación de las revistas científicas de educación*

Si centramos la mirada en las revistas del área de educación comprobamos que el interés y la valoración de estas publicaciones fueron muy tardíos. Como el resto de las revistas del área de ciencias sociales y humanidades, publicar en este formato no era algo extendido entre la comunidad universitaria. El cambio de cultura en este área se debió principalmente al impulso que se dio, tanto desde las universidades, como desde la Administración, a la investigación y al valor de lo publicado en formato de artículo tanto para la evaluación de la carrera docente como investigadora del profesorado universitario⁴. Esto derivó en el impulso de nuevos criterios de calidad en la edición y gestión de estas revistas, que condicionan el modo de publicar los resultados de la investigación y el propio proceso investigador. Estos criterios se fueron introduciendo de forma secuenciada, transformando el proceso editorial de las revistas, su calidad y, de forma especial, su visibilidad.

La calidad formal fue el primero de los indicadores a los que se prestó atención desde las revistas del área de educación. Sistematizar y hacer visibles los metadatos que deben identificarlas fue uno de los objetivos prioritarios en la década de los 90. De forma paralela, se implantaron cambios significativos en la gestión editorial hacia una mayor profesionalización, con el objetivo de eliminar el voluntarismo y el unipersonalismo en estas ediciones⁵. Para

³ *Ibid.*

⁴ E. Giménez-Toledo, C.M. Tejada-Artigas, *Proceso de publicación, calidad y prestigio de las editoriales científicas en Educación*, «Educación XX1», vol. 18, n. 1, 2015, pp. 17-44, doi: 10.594/educXX1.18.1.12310.

⁵ L. Rodríguez-Yunta, E. Giménez-Toledo, *Fusión, coedición o reestructuración de revistas científicas en humanidades y ciencias sociales*, «El Profesional de la Información», vol. 22, n. 1,

ello se requirió, por un lado, la intervención de equipos editoriales con una clara división de funciones; por el otro, la exigencia de mayor objetividad y transparencia en la evaluación de los originales, imponiéndose el conocido *peer review*. No obstante, algunos autores⁶ han puesto en duda los beneficios de la revisión por pares al entender que el anonimato no ayuda a comprometer a los revisores en la tarea que llevan a cabo⁷.

Ligada a la gestión editorial destaca, cada vez con mayor fuerza, la problemática de los modelos de negocio que debe proponer cada revista para afrontar su sostenibilidad. Si en un primer momento estas publicaciones eran auspiciadas por universidades o asociaciones científicas, resulta sintomático que en la actualidad gran parte de las revistas del «Journal Citation Reports» (JCR) en el campo de *Education & Educational Research* pertenezcan a las principales empresas editoras de revistas científicas (*Elsevier, Springer, Sage, Routledge, Taylor & Francis o Wiley*). En concreto, en 2013, de las 224 publicaciones recogidas, el 70% están gestionadas por las grandes editoriales mencionadas. Estos datos nos deben llevar a reflexionar sobre la adecuación de permitir que la difusión y la evaluación de los resultados científicos estén en manos de empresas privadas sujetas a las leyes de mercado, con todas las consecuencias que derivan de esta política.

Por último, las revistas científicas de educación se han ido incorporando a la publicación digital como una de las mejores vías para su difusión. No es extraño que en esta última década la plataforma OJS (*Open Journal Systems*), software de código abierto para la gestión de revistas creado por el *Public Knowledge Project* (1994), haya acaparado la gestión y publicación de revistas en internet⁸. Ahora bien, recordemos que no se trata simplemente de ofrecer los contenidos en este entorno, sino de pensar en digital, lo que conlleva un cambio radical en el modo de publicar, gestionar y difundir la información en el que el *Social Media* cobra cada vez más protagonismo.

2013, pp. 36-45, doi: 10.3145/epi.2013.ene.05.

⁶ J. Osca-Lluch, S. Miguel, C. González, M. Peñaranda-Ortega, E. Quiñones-Vidal, *Cobertura y solapamiento de Web of Science y Scopus en el análisis de la actividad científica española en psicología*, «Anales de Psicología», vol. 29, n. 3, 2013, pp. 1025-1031, doi: 10.6018/analesps.29.3.154911.

⁷ S. Hopewell, G.S. Collins, I. Boutron, L.M. Yu, J. Cook, M. Shanyinde, D.G. Altman, *Impact of peer review on reports of randomised trials published in open peer review journals: retrospective before and after study*, «BMJ», vol. 349, 2014, g4145, doi: 10.1136/bmj.g4145.

⁸ Ruiz-Corbella, Galán y Diestro, *Las revistas científicas de Educación en España: evolución y perspectivas de futuro*, cit.

3. *Visibilidad e internacionalización, indicadores claves de toda revista científica*

Un eje sobre el que gira gran parte de los procesos de evaluación de la calidad de las revistas científicas es el impacto de sus artículos, punto clave también para el reconocimiento de los investigadores. Toda publicación pretende llegar al mayor número de lectores para que los resultados publicados sirvan de punto de partida, revulsivo o contraste para otras investigaciones. El problema es cómo medir, de forma fiable y válida, ese impacto. Desde 1960, el *Institute for Scientific Information* (ISI) lleva trabajando en la valoración del *factor de impacto* de determinadas revistas consideradas excelentes e incluidas selectivamente en su base de datos. En la actualidad, tras la compra en 2008 de este instituto por parte de Reuters, se arbitra todo este proceso de evaluación en la *Web of Science* (WoS), plataforma que contiene, entre otras, el *Social Science Citation Index* (SSCI), que publica anualmente el *JCR*, ranking de las revistas científicas incorporadas al *SSCI*.

Como réplica en 2004 el grupo *Elsevier* promueve *SCOPUS*, base de datos selectiva que también promueve el ranking de estas revistas y la valoración de su impacto (*Scimago Journal Rank*). Ambas son recursos de información de las revistas seleccionadas, aunque lo más relevante es la modalidad de evaluación diferenciada que llevan a cabo⁹. *WoS* se distingue por una clara perspectiva anglosajona, que condiciona la entrada de revistas en otras lenguas. *SCOPUS* tiene mayor carga plurinacional y multilingüe. Se han dado otras iniciativas, como la europea *ERIH*, pero ninguna ha logrado ofrecer una evaluación tan confiable del impacto científico de las publicaciones. No obstante, en algunos países como España, se han hecho notables esfuerzos por evaluar las revistas de ciencias sociales, tanto de modo análogo al *JCR* (IN-Recs), como mediante clasificaciones cualitativas (RESH, CIRC, ANEP-FECYT, etc.)¹⁰, pero sin el apoyo gubernamental necesario para mantenerse en el tiempo. Esto nos lleva a que, hoy en día, se reconozcan, pese a sus limitaciones, a *WoS* y *SCOPUS* como los principales referentes de la difusión científica internacional reconocida¹¹.

Frente al uso exclusivo del factor de impacto, los *altmetrics* están cobrando fuerza como medida complementaria del impacto de una publicación, ya que reúne la métrica de diferentes fuentes de información que proporciona la red:

⁹ D. Gnana Bharathi, *Methods employed in the Web of Science and Scopus databases to effect changes in the ranking of the journals*, «Current Science», vol. 105, n. 3, 2013, pp. 300-308.

¹⁰ I.F. Aguillo, *Políticas de información y publicación científica*, «El Profesional de la Información», vol. 23, n. 2, 2014, pp. 113-118, doi: 10.3145/epi.2014.mar.02.

¹¹ Osca-Lluch, Miguel, González, Peñaranda-Ortega, Quiñones-Vidal, *Cobertura y solapamiento de Web of Science y Scopus en el análisis de la actividad científica española en psicología*, cit.; E. Archambault, V. Larivière, *The limits of bibliometrics for the analysis of the social science et humanities literature*, in *World Social Science Report. Knowledge Divides*, Paris, UNESCO, 2010, pp. 251-254.

número de accesos, descargas, capturas, comentarios en blogs, *tweets*, etc. son la nueva forma de objetivar el impacto directo de un artículo, de contabilizar la atención y la difusión. Aunque, como indican Torres-Salinas y Cabezas-Clavijo¹², *no todo lo que se puede contar, cuenta*, dado que los *altmetrics* presentan todavía limitaciones¹³, a la vez que aún son pocas las revistas de educación que presenten unos sistemas integrados, como los ofrecidos por *Altmetrics.com* para recoger toda esta diversidad de datos (*social shares*). El algoritmo empleado valora con pesos ponderados la difusión y presencia del trabajo en diferentes medios sociales, obteniendo un *score* (puntuación) del artículo, lo que está favoreciendo el paso a la evaluación del impacto de cada artículo de forma independiente.

Muy ligado al impacto, está la internacionalización de nuestras revistas, que pasa por cuatro ejes clave: la lengua en la que se edita, la atracción de autores relevantes de otros países, la composición de un consejo científico con una activa representación internacional y la inclusión en las bases de datos selectivas con mayor reconocimiento. Utilizar el inglés como lengua común de comunicación científica resulta de gran interés para la difusión de un artículo. Sin embargo, no podemos olvidar la singularidad de las ciencias sociales, en las que no existe una forma única de interpretar, desarrollar y comunicar los resultados de la investigación. Los criterios culturales, las tradiciones científicas de cada área geográfica y los aspectos locales susceptibles de estudio condicionan enormemente el desarrollo científico de cada entorno. Forzar la difusión científica en inglés a investigadores no anglófonos puede tener unos efectos nocivos que no se dan en las ciencias experimentales y biosanitarias. Debemos preservar las identidades culturales y la riqueza expresiva propia en ciertas áreas de conocimiento, potenciando la publicación en ambas lenguas. Por ello, hay que ser conscientes de las dificultades que sufren las revistas que conservan su lengua nacional, con una escasa presencia en bases de datos internacionales – en *SSCI* sólo el 7,1% – y una situación de desigualdad de oportunidades para competir en factor de impacto, debido a la importancia de la lengua de publicación a la hora de recibir citas¹⁴.

Relacionado con las tradiciones científicas de cada país está la capacidad de las revistas para atraer autores relevantes de otras regiones. La colaboración internacional contribuye a difundir la publicación y su contenido y acercar las diferentes culturas científicas. En la misma línea se dirige el logro de un consejo

¹² D. Torres-Salinas, A. Cabezas-Clavijo, *Altmetrics: no todo lo que se puede contar, cuenta*. «Anuario ThinkEPI», n. 7, 2013, pp. 114-117, <<http://hdl.handle.net/10481/26361>> (accessed: July 5, 2014).

¹³ M. Thelwall, S. Haustein, V. Larivière, C.R., Sugimoto, *Do Altmetrics Work? Twitter and Ten Other Social Web Services*, «PLOS ONE», vol. 8, n. 5, 2013, e64841, doi: 10.1371/journal.pone.0064841.

¹⁴ Ruiz-Corbella, Galán y Diestro, *Las revistas científicas de Educación en España: evolución y perspectivas de futuro*, cit.

científico internacional, que colabore activamente en estrategias concretas de difusión y de visibilidad en su país de origen.

Junto con la inclusión en las bases de datos más prestigiosas, no podemos olvidar la visibilidad a través del medio social. En estos momentos resulta esencial crear un perfil de la revista en *Google Académico*, que aporta el índice de citas y la situación en el ranking (índice h), a partir de las citaciones detectadas en la red. Asimismo, es prioritaria la presencia en las redes sociales o en las específicas para investigadores (*Twitter, Facebook, ResearchGate, Academia Edu*, etc.), que facilitan de forma inmediata el acceso a la información de los contenidos seleccionados de la publicación. Destacar una idea, generar debate, informar, etc. son funciones que ahora se debe atender. Los equipos editoriales de las revistas científicas ya no pueden limitarse a presentar periódicamente una serie de artículos, sino que deben abordar las nuevas formas de posicionarse ventajosamente en los rankings e involucrar a sus autores en estas tareas de difusión que ayudarán a visibilizar los avances científicos. Algunas bases de datos exigen a las revistas que muestren cuál es su aportación diferencial respecto a las revistas existentes, por lo que resulta necesario caracterizarse con una imagen propia de marca (*branding*), que sea distinta y que permita identificarse y destacar entre los demás.

Nos enfrentamos, en conclusión, a un nuevo modo de entender la edición y pervivencia de las revistas científicas, lo que requiere una especial implicación y visión de futuro a los editores de revistas no anglosajonas o no gestionadas por empresas de ámbito anglófono. Las políticas gubernamentales de incentivos tendrán una importante incidencia sobre el futuro de las revistas, así como la concreción de la coordinación y la evaluación a nivel supranacional¹⁵.

¹⁵ F. Pedró, *Las políticas de investigación e innovación en educación: una perspectiva supranacional*, «Bordón. Revista de Pedagogía», vol. 67, n. 1, 2014, pp. 39-56, doi: 10.13042/bordon.67129471.

Revistas científicas e historia de la educación: una reflexión personal

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Scientific journals and history of education: some personal reflections

ABSTRACT: This text constitutes a personal reflection on some issues related to the role of scientific journals in the history of education. After a brief presentation of «Historia y Memoria de la Educación», the scientific publication of the Spanish Society of History of Education, the increasing number of journals and the scientific production in general, and in this field, are analyzed, as well as the limited diffusion, obsolescence and repetitiveness of the already known or said. Then, the mainly negative or intricate effects of the implementation, in the field of the human and social sciences, of the operating modes and evaluation criteria of the journals and the scientific production of the so-called experimental or 'hard' sciences are dealt with, as well as the consequences of the increasing commercialization in the world of scientific journals.

EET-TEE KEYWORDS: Periodical; History of Education; Historical Research; State of the Art Review; Spain; XX-XXI Centuries.

Introducción: el autor y su circunstancia

Quando desde «History of Education & Children Literature» se me pidió, como director de «Historia y Memoria de la Educación», un texto escrito en el que expresara mis ideas o planteamientos en relación con el papel o función de las revistas científicas en general y, de modo particular, en el campo de la Historia de la Educación, manifesté que se pedía la opinión o criterio de alguien que dirigía una revista cuyo primer número estaba en preparación. Hoy, cuando comienzo a escribir, es cuestión de días que aparezca dicho primer número, el segundo se halla en evaluación y se han aprobado ya los temas y autores de las secciones monográficas de los números 3 y 4 a publicar en 2016.

Quiero esto decir que lo que a continuación se escribe es más producto de la reflexión personal, como se dice en el título, que de mi experiencia como director de una revista científica histórico-educativa que acaba de nacer. Una reflexión personal que, como es obvio, no parte de la nada. Se basa o está elaborada a partir de mi experiencia como miembro de los consejos asesores o científicos de un amplio número de revistas histórico-educativas o de ciencias sociales españolas o de otros países y, en España, del Comité Asesor del Campo 7 (Ciencias Sociales, Políticas, del Comportamiento y de la Educación) de la Comisión Nacional Evaluadora de la Actividad Investigadora (CNEAI) del Ministerio de Educación, Cultura y Deporte durante los años 2002 y 2003, de la Comisión de Ciencias Sociales y Jurídicas para la evaluación del profesorado de la Agencia Nacional de la Evaluación de la Calidad y de la Acreditación (ANECA) en el curso 2004-2005, y de la Comisión de Expertos del Ministerio de Ciencia e Investigación para la evaluación de proyectos de investigación en el área de Educación en los años 2009, 2010 y 2011, así como, actualmente, de mi tarea como evaluador de proyectos de investigación en la Agencia Nacional de Evaluación y Prospectiva (ANEP) del Ministerio de Ciencia e Innovación, y en agencias similares de algunas comunidades autónomas del país. Que sea el producto de una reflexión personal indica, asimismo, que lo que se escribe o afirma no está basado en concienzudos y sofisticados análisis bibliométricos, sino, como dije, en mi experiencia como evaluador de proyectos de investigación y de los *curriculum vitae* de mis colegas, a la que hay que añadir mi todavía más dilatada experiencia como investigador y miembro o director de proyectos de investigación. No deben darse, pues, a mis palabras más valor que el que tienen como opiniones de índole, sin duda, parcial y subjetiva. Incluso es posible que alguien las encuentre en ocasiones superficiales o propias de quien ya está de vuelta o más allá del mundo real. Experiencias similares pueden dar lugar, además, a valoraciones y juicios diferentes. Pero antes de exponer mis puntos de vista sobre los cambios recientes y la situación actual de las publicaciones científicas en general, y en el campo de la historia de la educación en particular, permítanme que, con el fin de que conozcan también la posición y el contexto desde el que hablo, haga una breve presentación de la revista que dirijo aunque, como se desprende de lo dicho, este texto esté escrito a título puramente personal e ignore hasta qué punto es compartido, o no, por quienes componen su Consejo de Redacción.

«Historia y Memoria de la Educación» en el contexto de las revistas científicas españolas de historia de la educación

«Historia y Memoria de la Educación» (HME) es, como en su web se indica, el «órgano de expresión y comunicación científica de la Sociedad Española de

Historia de la Educación (SEDHE)»¹. Es decir, se ha gestado como una más, a nivel internacional, de las revistas de historia de la educación – «History of Education», «Revista Brasileira de História da Educação», «Historia de la Educación. Anuario», «Revista Mexicana de Historia de la Educación», «History of Education Review Journal», entre otras – ligadas a la sociedad de historia de la educación de un país determinado. En ello se diferencia, para lo bueno y para lo malo, de aquellas revistas que dependen de editoriales privadas o de universidades, centros de investigación, personas, grupos o corporaciones concretas. Como buena hija de su tiempo y – porque no decirlo –, por razones económicas, es una revista digital, de libre acceso y de periodicidad bianual, que viene a sumarse a otras dedicadas a este campo de enseñanza e investigación ya existentes en España – «Historia de la Educación. Revista Interuniversitaria» (1982), «Educaçió i Història. Revista d’Història de l’Educaçió» (1994), «Sarmiento. Anuario Galego de Historia da Educación» (1997), «Cabás» (2009), «Historia Social y de la Educación» (2012), y «Espacio, Tiempo y Educación» (2014) –, y a las revistas de educación o pedagogía, o de historia, que publican ocasionalmente algún artículo, o dedican algún número monográfico a cuestiones histórico-educativas. O sea, nace en un ‘mercado’ científico no sé si sobresaturado, pero sí impensable hace unos diez o quince años.

Esta sobresaturación, producto sin duda de las facilidades y el bajo coste de la edición electrónica, junto con la creciente apertura al exterior de la historiografía educativa española², ha originado que la mayoría de las revistas nacidas en los últimos años, y algunas de las anteriores, hayan adoptado una política lingüística – siguiendo el modelo establecido en su día por «History of Education & Children Literature» – abierta a la publicación de artículos en inglés, francés, italiano y portugués, además del español. Es decir, de trabajos que, en bastantes casos, versan sobre la historia de la educación de otros países. Ello plantea, como es obvio, problemas de evaluación, revisión y corrección, así como en relación con el contenido y el proceso de escritura. Si lo que se pretende, por ejemplo, es la difusión y lectura de los mismos más allá del ámbito nacional o estatal de referencia del trabajo, será necesario no solo recurrir a perspectivas y referencias comparativas, sino incluir explicaciones específicas, para los lectores de otros países, sobre aquellas denominaciones de períodos históricos concretos, o alusiones a personajes o acontecimientos perfectamente identificables y conocidos por los lectores del país de que se trate, pero no por los de otros.

Un rasgo distintivo de «Historia y Memoria de la Educación», aparte de la recién mencionada política lingüística, es el que se refiere a las reseñas de libros, un aspecto al que, por lo general, no suele concedérsele la importancia

¹ <<http://revistas.uned.es/index.php/HMe>>.

² A. Viñao, *From dictatorship to democracy: history of education in Spain*, «Paedagogica Historica», vol. L, n. VI, 2014, pp. 830-843.

que debería tener por su habitual brevedad y carácter puramente informativo o descriptivo. En este punto, el propósito de la revista es que las reseñas se acerquen a ese ideal del comentario o examen crítico de libros que, de acuerdo con Jordi Gracia, pretendería Ortega y Gasset en 1908:

a veces es comentario crítico de la obra y muchas otras es pretexto para un ensayo de materia libérrima suscitada por la lectura. Y además Ortega enseña a leer: la función de la crítica es despertar a la vista del lector lo que está dormido en el libro y que una mirada más inexperta no captará; sirve para elevar la finalidad secreta de un libro más que para aquilatarlo frente a una supuesta norma o poética³.

Unas reflexiones ya lejanas en el tiempo, pero de actualidad

La diversidad, amplitud y celeridad de la producción escrita en el mundo científico ha hecho de las revistas el lugar donde suelen publicarse los textos que reflejan las últimas tendencias e investigaciones en un campo determinado. En esta segunda mitad del siglo XX, la revista, como medio de conocimiento e información científica, ha sustituido al libro. Su especialización temática y textual – artículos de extensión limitada – y periodicidad han hecho de ellas un medio de difusión más ágil en el que los autores o bien anticipan trabajos más amplios, o bien publican artículos que pueden ir desde la singularidad y concreción más extremas a las síntesis y revisiones generales de lo publicado en los últimos años en relación con temas más amplios. Asimismo, las revistas incluyen información bibliográfica y académico-científica, constituyendo su existencia uno de los indicadores fundamentales para saber si una disciplina, área de conocimiento o cuestión ha adquirido la suficiente pujanza como para disponer de una publicación periódica propia.

Su periodicidad y fugacidad tienen, sin embargo, un contrapunto: la obsolescencia de lo publicado. Solo una pequeña parte de lo que en ellas aparece es leído con detenimiento, incluso por los especialistas en el campo o tema de que se trate. Y solo una pequeña parte de esta «enorme masa de trabajo irrelevante» es citada en trabajos posteriores. En el campo de la historia no más allá, al parecer, de un 5 por ciento⁴. Pese a ello, las revistas no solo se mantienen, sino que cada vez surgen otras nuevas más especializadas. La causa de esta diversificación es la antes apuntada relación que existe entre la configuración de un campo y de una comunidad académico-científica y la aparición de una o más revistas específicas que permitan a los miembros de dicha comunidad disponer

³ J. Gracia, *José Ortega y Gasset*, Madrid, Santillana, 2014, p. 93.

⁴ J. Fontana, *La historia después del fin de la historia*, Barcelona, Crítica, 1992, p. 124.

de un órgano de expresión científica, de un medio de comunicación, y de un lugar en el que publicar sus trabajos e investigaciones⁵.

Este largo párrafo fue escrito en los años 1994-1995 cuando redactaba la *Memoria o Proyecto docente e investigador* que presenté, en 1996, para optar a la cátedra de Teoría e Historia de la Educación de la Universidad de Murcia. Corresponde al capítulo dedicado, entre las «fuentes impresas de referencia preliminar y general», a las «revistas y publicaciones periódicas». Desde entonces han transcurrido veinte años. Y lo allí dicho no solo puede seguir afirmándose, sino que se ha visto acrecentado y superado por la realidad. En especial, a causa de las facilidades y menor coste de la edición electrónica *on-line*, de la creciente presión del *publish or perish* y de la introducción del capital privado en ese nuevo y prometedor mercado de las publicaciones científicas, electrónicas o impresas. Como recientemente escribía:

En un campo como el de la historia de la educación en el que no solo hay que estar atento y conocer lo que se publica en los tan fragmentados mundos de la historia y de la educación o pedagogía, sino también en otras ciencias sociales y humanas fronterizas, y no menos fragmentadas, como la antropología, la sociología, la filosofía o la lingüística, por mencionar solo cuatro de ellas, se corre el peligro de que dicha proliferación, consecuencia asimismo del «publicar o morir», origine ese fenómeno que tan acertadamente ha expuesto Rebecca Rogers en un reciente artículo: es tal el número de revistas digitales o impresas – accesibles también, por lo general, por vía electrónica – que se recibe, que, cuando llegan por una u otra vía, nos limitamos a leer el índice con los autores y títulos de los artículos, ojear, como mucho, las reseñas de libros, y guardarlas o archivarlas en el lugar físico o virtual correspondiente; eso si esta última operación, la de su guarda y archivo, no se produce de modo inmediato tras la recepción de la revista⁶.

Nuestros hábitos lectores han cambiado, están cambiando para adaptarse a una nueva situación en la que además, añado, están comenzando a proliferar espacios electrónicos y redes sociales de colaboración e intercambio científico que, en el fondo, no son sino versiones ultrarrápidas, casi instantáneas, de las revistas científicas. ¿Para qué esperar varios meses a publicar un texto recién escrito, o intervenir en un debate a través de una revista, cuando puedo difundirlo de inmediato? ¿Cómo se combinarán en el futuro ambos ámbitos, el de las revistas y el de las redes o espacios electrónicos, y cómo se articularán entre sí? ¿Qué modificaciones supondrá ello en el mundo de la escritura y lectura científicas? ¿Dejaremos algo para los libros? ¿Habrà tiempo para escribirlos?⁷

Estas reflexiones no son extemporáneas. Mucho menos en un campo, el de las ciencias sociales, en el que, a diferencia de lo que sucede en el de las llamadas ciencias experimentales o «duras», no es infrecuente que se publiquen artículos

⁵ A. Viñao, *Historia de la Educación. Proyecto docente e investigador*, Murcia, Universidad de Murcia, 1996, p. 201 (ejemplar multicopiado).

⁶ R. Rogers, *Paedagogica Historica: trendsetter or follower?*, «Paedagogica Historica», vol. 50, n. 6, 2014, pp. 717-736, en especial el epígrafe titulado «Evaluating trends in an electronic age: the viewpoint of the author's study» (pp. 734-736).

⁷ A. Viñao, *Presentación*, «Historia y Memoria de la Educación», n. 1, 2015, pp. 21-22.

o capítulos de libros en los que se tratan, sin aportar nuevas informaciones, enfoques o interpretaciones – o con aportaciones mínimas – cuestiones o temas ya tratados con anterioridad por otros autores. Algo así como si se enviara un artículo a «Science» o «Nature» explicando o dando cuenta de la teoría de la relatividad. Y mucho menos aún cuando, día sí, día no, llegan a nuestro correo electrónico anuncios, convocatorias o peticiones para que enviemos artículos a tal o cual revista – con tema ya predeterminado o sin él – en los que se nos asegura que dicha revista – la mayoría de las veces nueva o desconocida hasta entonces – está indexada en todos las bases de datos y lugares posibles, cumple todos los requisitos habidos y por haber y posee un alto índice de impacto. Estamos, en síntesis, ante una nueva situación, cambiante y fluida, que, al menos en mi caso y desde mi experiencia en estos temas, suscita una serie de reflexiones. Una situación, además, caracterizada, entre otros rasgos, por el imperio de los criterios de funcionamiento y valoración de las ciencias ‘duras’ y por la creciente mercantilización del mundo de las publicaciones periódicas científicas; es decir, por la presencia de intereses económicos que están condicionando lo qué se investiga, cómo se investiga, cómo se escribe y se difunde lo que se escribe y dónde se publica.

El imperio de las ciencias «duras», o cómo la investigación en las ciencias sociales y humanas está siendo condicionada por criterios ajenos a ellas

Los modos de investigar, escribir, publicar y difundir la investigación propios de las ciencias llamadas «duras» han condicionado, y condicionan cada vez más, los de las ciencias sociales y humanas. En unos casos, no lo niego, para bien. Por ejemplo, en la pretensión de rigurosidad y la ausencia de verborrea. En otros, para mal, al no coincidir con los que exigen o son propios de dichas ciencias.

Como dije antes, el artículo de revista ha desplazado al libro como medio de difusión científica. La brevedad y la menor duración del lapso de tiempo que transcurre entre la redacción de un artículo y su publicación son dos rasgos que explican dicho desplazamiento. Los libros hoy, salvo que tenga su origen en una tesis doctoral, suelen ser el resultado final de una serie de artículos y capítulos de libros colectivos o conferencias y trabajos presentados en congresos y seminarios que, tras su revisión y, como mucho, algún texto inédito, se reúnen en un solo volumen. Esto, como es obvio, no es una crítica; entre otras razones, porque sería una autocrítica. Es una constatación. Así sucede por ejemplo, por referirme a uno de los filósofos de la educación hoy en día más prestigiosos y afamados, con *Good Education in an Age of Measurement. Ethics, Politics, Democracy* de Gert J.J. Biesta, cuyos seis capítulos habían sido publicados con anterioridad, total o casi totalmente, en diversas revistas y libros de autoría

colectiva⁸. Según se indica en su website, Biesta publicó desde 2010 a 2014, ambos años incluidos, un total de 71 artículos y 72 capítulos de libros – 28,6 artículos y capítulos de libro por año, 2,38 por mes –, además de 21 libros, buena parte de ellos, desde luego, como editor o coeditor. Y durante el 2015, hasta el 10 de marzo, ya ha publicado 7 artículos o capítulos de libro y 3 libros⁹. Por supuesto, Biesta recibe peticiones para publicar de las más prestigiosas editoriales y revistas. Se le demandan textos por unos y otros, y en el cómputo efectuado entran traducciones y versiones modificadas de trabajos anteriores. Por supuesto, debe disponer de un apoyo administrativo a la docencia y a la investigación impensable en un investigador español de ciencias sociales y humanas¹⁰. Por último, y también por supuesto, pueden encontrarse ideas, argumentos, referencias bibliográficas y cuestiones más o menos similares a poco que uno se adentre en sus textos. Es imposible decir algo nuevo cada quince días o cada mes. Ni siquiera, a veces, cada año. Y no es este el único caso. Quizás sea uno de los más paradigmáticos, pero no el único. ¿Cuándo queda tiempo para la reflexión, la reconsideración de lo dicho o escrito, la lectura y relectura sosegada o la producción de nuevo saber y conocimiento? ¿O, en el ámbito de la historia, para el concienzudo y lento trabajo en el archivo, la biblioteca, la hemeroteca u hoy, cada vez más, la fototeca, la filmoteca o los museos pedagógicos? ¿Cobra sentido, en este contexto, el movimiento de la *slow science* o *slow research*?

No debe verse en las anteriores observaciones la menor intención crítica hacia un autor que siempre se lee con provecho. Solo se trata de constatar un fenómeno – posible gracias a la escritura electrónica – provocado, en el ámbito de las ciencias sociales y humanas, por la elevada demanda de producción científica que recae sobre los autores de mayor prestigio y más citados. Si los índices de impacto se elaboran a partir del cómputo de las citas o referencias, es obvio que toda revista que se precie deseará incluir en sus páginas artículos o textos de los autores de referencia obligada. La exigencia habitual en muchas revistas de que los artículos presentados no hayan sido publicados anteriormente suele soslayarse, en estos casos, pidiendo al autor o autora que introduzca algunas modificaciones no sustanciales en el título, epígrafes, bibliografía mencionada y algunos párrafos. Paradójicamente, ello implica, en este campo científico, algo no habitual en el de las ciencias ‘duras’ donde la revista es el medio casi exclusivo de difusión de los trabajos científicos: la sobreproducción repetitiva. He aquí un claro ejemplo de cómo los mismos hechos – la conversión de las

⁸ G.J.J. Biesta, *Good Education in an Age of Measurement. Ethics, Politics, Democracy*, Boulder, Colorado, Paradigm Publishers, 2010.

⁹ <<http://www.gertbiesta.com>> (consulta efectuada el 19 de marzo de 2015).

¹⁰ Mi experiencia personal, o de otros colegas, me indica que alrededor del 30 por ciento del total del tiempo dedicado a la docencia y la investigación está hoy ocupado por tareas burocrático-informáticas. Si se es responsable de un proyecto de investigación, ese porcentaje puede alcanzar muy bien el 50 por ciento. Hemos creado entre todos un monstruo que nos devora.

revistas en el medio habitual de difusión de la investigación – producen efectos diferentes en uno u otro campo científico.

La brevedad y, con ella, la normalización de la estructura y disposición de lo escrito con arreglo a un esquema admitido como propio de los trabajos científicos, es un segundo aspecto donde se advierte la influencia de las ciencias ‘duras’ en las sociales y humanas. Hay revistas que establecen límites a mi juicio algo estrictos en relación con la extensión de los textos. Ocho mil palabras, por tomar un ejemplo real – el de «Paedagogica Historica» –, pueden resultar suficientes en más de un caso, pero insuficientes en otros. Sobre todo en historia. En este punto, como en otros, los responsables de la revista deben obrar con flexibilidad. Lo que exige, también este aspecto como en otros, que dichos responsables estén en condiciones de hacer un uso adecuado de dicha flexibilidad por pertenecer al campo científico de la revista en cuestión – un tema sobre el que volveré más adelante –. La brevedad y concisión quedan aseguradas al aplicar un esquema normalizado y admitido como el único ‘científico’: exposición de los objetivos y partes de que consta el artículo, aspectos metodológicos – y, en el caso de la historia, fuentes –, resultados o hallazgos de la investigación, y conclusiones derivadas de dichos resultados o hallazgos. Todo ello de modo directo, conciso y lo más escueto posible. En esto, como en todo, los excesos son contraproducentes. Tan criticable es la mera acumulación de información irrelevante – algo no inhabitual en los trabajos históricos en los que a veces se confunde la crónica o el simple dato con la operación histórica –¹¹ como la sequedad y cortedad de un estilo o esquema apropiado sin duda para otros campos científicos pero que, en el caso de la historia, no permite contextualizaciones, asociaciones y referencias cruzadas o relativas a los antecedentes y presentación del tema objeto de estudio, ni un estilo o pensamiento narrativo. Es decir, una presentación de los personajes y elementos, un entramado de preguntas, cuestiones, datos e informaciones, su interpretación y un desarrollo o esclarecimiento final, siquiera parcial, de las mismas. Ello por no aludir a la inadecuación de dicho esquema cuando lo que se pretende es ofrecer un estado del arte o cuestión en relación con un tema determinado, o simplemente utilizar un estilo más ensayístico por exigirlo así la naturaleza de lo tratado.

¹¹ La historia, el discurso histórico, constituye «el modelo de esos relatos que admiten el relleno de los intersticios entre sus funciones por medio de anotaciones estructuralmente superfluas» (R. Barthes, *El susurro del lenguaje. Más allá de la palabra y la escritura*, Barcelona, Ediciones Paidós, 1987, p. 185).

Ciencia, competencia y mercado: algunas consideraciones sobre los procesos de evaluación de la producción y revistas científicas

La producción científica difundida mediante artículos de revista ha de pasar un doble filtro evaluador: primero, el de la revista a la que se envía el artículo; después, el que corresponde a todo proceso evaluador de dicha producción a nivel nacional, ya sea en relación con el reconocimiento oficial de unos determinados tramos de investigación, ya sea al evaluar el *curriculum vitae* con el fin de obtener la acreditación que permita acceder a un puesto docente e investigador en alguna universidad, o financiación para un proyecto de investigación.

La evaluación de artículos por las revistas

Hoy en día es un requisito formal inexcusable, si una revista pretende estar indexada y ser considerada «científica», que los artículos enviados a la misma, o solicitados por ella, sean evaluados por dos informantes que el autor o autora no conoce y, en caso de discrepancia, incluso por un tercero. Nadie objeta en general nada a un procedimiento importado de las revistas del ámbito de las ciencias ‘duras’. Los que tenemos cierta edad hemos conocido, sin embargo, otros procedimientos que conferían la responsabilidad sobre la publicación, la revisión o el rechazo de un artículo a quienes dirigían la revista o, como mucho y en casos dudosos, al reducido grupo de miembros del consejo o comité de redacción. Incluso hasta fechas recientes podría mencionar revistas que han seguido dicho sistema, sin que por ello pueda cuestionarse la calidad media de los artículos en ella publicados – todo queda, en definitiva, al criterio de los responsables de la revista –, aunque, al final, hayan tenido que claudicar ante un sistema ya normalizado y generalizado, si es que quienes publican en ella desean que sus artículos sean evaluados después positivamente en el ‘mercado’ de la ciencia. Un sistema en el que la calidad y bondad de un artículo no dependen de lo que en él se dice y de cómo lo dice, sino del impacto ‘científico’ de la revista en la que se publica. Un impacto medido por las referencias o citas que a ella se efectúan en otras revistas, no en libros o actas de congresos, y en ocasiones, como sucede con los índices de impacto de elaboración nacional, sin tener en cuenta las revistas de otros países¹². O, en las bases de datos de revistas científicas, por el cumplimiento de una serie de requisitos formales – en

¹² Algo relevante en el caso español ya que no se mide el impacto del artículo en cuestión en Latinoamérica, donde puede muy bien suceder que sea más citado o referenciado que en España.

algún caso hasta veintitantos – que solo guardan una relación indirecta con el contenido de los artículos, si es que la guardan¹³.

No es extraño que en los últimos años hayan surgido críticas a dicho sistema, incluso en el ámbito de las ciencias experimentales o ‘duras’¹⁴. Mucho más en el de las ciencias sociales y humanas. Y no ya porque todo sistema, sea el que sea, crea sus propias perversiones – al fin y al cabo, los responsables de la revista suelen elegir en cada caso a los evaluadores –, sino porque, aplicado de un modo formalmente rígido, puede producir efectos no previstos ni acordes con el objetivo perseguido al implantarlo. Lo que quiero decir con esto es que si el sistema ha de ser aplicado con flexibilidad para que no produzca dichos efectos, su bondad depende, en definitiva, de quienes son responsables científicos de la revista. Y en este punto son fundamentales tanto la elección de los evaluadores como lo que, tras los informes, se dice o pide al autor o autora del artículo para que lo revise, modifique y mejore. La designación de los evaluadores es clave. No solo se trata de que conozcan el tema objeto del artículo que han de evaluar, sino que, además, han de tener una mente amplia, abierta, no unidireccional. No se trata de que el artículo diga lo que al evaluador o evaluadora le parece que debería decir si lo hubiera escrito él o ella, sino de que haga observaciones o proponga modificaciones que mejoren el artículo en la dirección, línea o concepción del tema que tiene el autor o autora. No de lo que a su juicio debería, o no, investigarse. Una consideración válida asimismo para la evaluación de proyectos de investigación o *curriculum vitae* de otros colegas. Y plenamente aplicable a un campo donde en ocasiones suele distinguirse, como si fueran dos campos opuestos, entre la historia del pensamiento o ideas – la historia de la pedagogía – y la fenómenos, instituciones, hechos y procesos educativos – la historia de la educación –. Una distinción que solo sirve para empobrecer a ambas haciendo de la primera algo etéreo, más allá de lo real, y a la segunda algo inexplicable por sí mismo o desprovisto de sentido.

En síntesis, lo que defiendo es la intervención de los responsables científicos de la revista, cuando lo estimen necesario, tanto en la selección de los evaluadores como en la decisión final sobre las observaciones que se hacen y la revisión y modificaciones que se piden al autor o autora. Y, por tanto, lo que cuestiono es que ambos aspectos se dejen en manos de personas del mundo editorial –

¹³ Son cada vez más numerosos los requisitos formales exigidos para incluir, o no, una revista en un índice o base de datos o conferírle una determinada calificación o valoración. Se trata, en el fondo, de un fenómeno similar al de las agencias privadas en el campo de la economía con resultados por todos conocidos, por no aludir a las existentes en el ámbito de la educación. Muchos de dichos requisitos formales – no es este el caso de la petición de al menos dos informes ‘ciegos’ – no guardan relación alguna con la calidad o bondad de lo en ella publicado. Es decir, no suponen, por sí mismos, una mayor o menor calidad científica de los artículos que se publican.

¹⁴ O que haya quienes, pudiendo permitírsele, digan que rechazan el sistema de informes ‘ciegos’ y que están dispuestos a debatir con dos o más colegas las observaciones, críticas y supuestas mejoras que puedan hacerse a un texto enviado para su publicación, siempre y cuando se identifiquen y se trate de un debate público, propiciado por la misma revista.

editores, gestores, revisores, correctores – que no pertenecen al campo científico de la revista. Esto que hubiera sido impensable hace varios años, está siendo de hecho cada vez más común. Sobre todo en aquellos casos en los que las revistas son publicadas por editoriales privadas o que, dependiendo de universidades, centros de investigación o asociaciones científicas, son gestionadas por profesionales del mundo editorial pero no del campo científico al que dicha revista pertenece. Nada tiene de extraño – me limito a poner ejemplos recientes, vividos por mí o que conozco de cerca – que se devuelva el artículo al autor o autora para que lo haga más «more readable»¹⁵, que se le pida que explique en una nota qué es eso de la escuela francesa de *Annales* – algo que, por lo visto, desconocía la persona encargada en la editorial de revisar el artículo –, o que se supriman frases, se añadan aclaraciones o se introduzcan cambios que la editorial considera oportunos sin que los autores puedan opinar al respecto o los conozcan, como recientemente ha sucedido, con muy agrias protestas, en una revista de historia de la educación muy conocida y, por otro lado, prestigiosa. Incluso que, decididamente dispuestos a ceder ante la superficialidad, la velocidad y la brevedad – nada que ver con la levedad, la rapidez, y la visibilidad que Italo Calvino proponía para este milenio en la Universidad de Harvard, en el curso 1985-1986, junto con la exactitud y la multiplicidad, en el que después sería su testamento intelectual –¹⁶, otra no menos prestigiosa revista *on-line* en el campo de la educación se haya dirigido a quienes publican en ella para que, si les parece oportuno, graben un video de cinco minutos resumiendo el contenido del artículo para hacerlo accesible junto con el mismo. Que nadie dude: no pasarán muchos años sin que lo que hoy es una invitación o sugerencia pase a ser una imposición en más de una revista. Hasta es posible que estemos ante futuro requisito formal más para la indexación u obtención, por parte de la revista en cuestión, de una determinada valoración o calificación, por supuesto positiva, a cargo de agencias privadas. En especial, si la grabación se hace sonriendo e incluye alguna frase graciosa. Al fin y al cabo, de este modo el video resulta más simpático y ahorra la engorrosa tarea de leer no ya el artículo sino incluso el *abstract*¹⁷. De un modo u otro, extraña que nadie haya pensado y puesto en práctica la creación en el campo

¹⁵ «Les gustan los libros que se consiguen con facilidad, que se leen de prisa, que no exigen un detenido estudio para ser comprendidos», decía Alexis de Tocqueville de aquellos estadounidenses que, habiendo recibido una educación literaria, disponían de breve tiempo para dedicarlo a las letras (*La democracia en América*, Madrid, Alianza Editorial, 1980, vol. II, p. 55).

¹⁶ I. Calvino, *Six Memos for the Next Millennium*, Cambridge, Harvard University Press, 1988 (traducción al español: *Seis propuestas para el próximo milenio*, Madrid, Ediciones Siruela, 1989).

¹⁷ Hechos como el comentado confirman los negros presagios ya anunciados por N. Postman en ese lúcido libro titulado *Amusing Ourselves to Death. Public Discourse in the Age of Show Business*, New York, Penguin Books, 1986 (traducción al español: *Divertirse hasta morir. El discurso público en la era del «show business»*, Barcelona, Ediciones de la Tempestad, 1991).

científico de ‘revistas’ audiovisuales. Al fin y al cabo, las tecnologías que lo permiten están ya, ahí, disponibles. Solo es cuestión de tiempo y de que ello suponga algún beneficio económico, o la consecución de un determinado grado de poder o control sobre la difusión de la producción científica.

La evaluación de la producción científica: algunos problemas del caso español y de la investigación histórico-educativa

Una vez publicados en una revista determinada, los artículos se incorporan al *curriculum vitae* del autor o autora y ya no volverán a ser evaluados salvo, en el caso español – y en general en otros países –, cuando, como antes dije, se solicite el reconocimiento oficial de unos determinados tramos de investigación, o la obtención de la acreditación que permite acceder a un puesto docente e investigador en alguna universidad, o financiación para un proyecto de investigación.

Los referidos tramos de investigación reciben en España el nombre de sexenios: todo profesor universitario puede, si lo desea, someter a evaluación la producción científica de seis años con el fin de obtener uno de dichos tramos. El máximo posible son seis tramos y la evaluación corre a cargo de comisiones nacionales. En el caso de la pedagogía o educación, dicha comisión es la ya mencionada de Ciencias Sociales, Políticas, del Comportamiento y de la Educación, aunque alguna reconocida historiadora española de la educación haya optado, en general, por presentar su solicitud en la Comisión de Historia y Expresión Artística por considerar que allí serían mejor considerados sus trabajos. Desde el punto de vista económico, la posesión de uno o más tramos de investigación es poco relevante. No sucede así desde el punto de vista académico e investigador: se trata de un elemento determinante para formar parte de tribunales de tesis doctorales, ser acreditado para optar a puestos docentes, obtener financiación para proyectos de investigación o ser miembro de comisiones evaluadoras de todo tipo.

¿Qué problemas se plantean en relación con la evaluación de la producción científica en el campo de la historia de la educación y, en especial de los artículos? La normativa general exige, para ser evaluado positivamente, la aportación de artículos publicados en revistas indexadas en índices internacionales – o sea, anglosajones – de impacto científico, o de capítulos de libro y libros publicados en editoriales de reconocido prestigio internacional. En determinados campos, el de la educación entre ellos, también suelen valorarse positivamente algunas revistas y editoriales de ámbito nacional. En el primer caso, en función de listados o rankings elaborados anualmente por diversas entidades u organismos de naturaleza universitaria, pública o semipública. Lo que no se valora en

absoluto son las publicaciones universitarias o en revistas y editoriales locales o regionales, las tesis doctorales y las actas de coloquios, seminarios y congresos.

Con estos criterios de evaluación lo que se pretende, entre otras cosas, es forzar a los investigadores a que publiquen en el exterior y, sobre todo, en inglés y en revistas incluidas en el «Journal Citation Index Social Sciences». En otras palabras, lo que se valora no es el contenido de los trabajos sino donde se publican. Pongamos un ejemplo: un libro que sea el resultado de varios años de investigación, publicado en una editorial universitaria, local o regional – algo habitual en investigaciones históricas centradas en una localidad o región determinada – obtendrá alrededor de 0,10 puntos – mínimo: 0, máximo: 2 –, mientras que un artículo elaborado a partir de un capítulo de ese mismo libro y publicado en una revista española que esté situada en el primer cuartil de los índices de impacto nacionales, puede muy bien obtener 1 punto, incluso 1,25, y si se traduce al inglés y se publica en, por poner algún ejemplo, «History of Education Quarterly» o «Paedagogica Historica» hasta 1,75 o 2 puntos, siempre y cuando convenza al resto de los miembros de la comisión – psicólogos, sociólogos, politólogos, antropólogos, comunicólogos... – de que la historia de la educación es un campo muy peculiar que cuenta con pocas revistas específicas en los índices de impacto internacionales.

Los historiadores de la educación españoles tienen, en relación con este tipo de evaluación, dos problemas. Uno personal, y otro académico-científico. Al tratarse de una comisión nacional compuesta por no más allá de seis o siete miembros, no es posible que formen parte de ella investigadores de todas las áreas o subáreas del conocimiento. De hecho, solo suele haber un representante de lo que se denomina Educación. Es posible, por tanto, que sus trabajos sean valorados por un profesor de Didáctica de las Matemáticas o de la Educación Física, de Didáctica y Organización Escolar o de Pedagogía Social, por indicar algunas de las áreas y subáreas académicas del ámbito educativo. A la inversa, cuando un historiador de la educación es elegido para formar parte de dicha comisión en representación de la Educación, se ve obligado a evaluar trabajos de Didáctica de las Matemáticas o de la Educación Física, de Didáctica y Organización Escolar o de Pedagogía Social, entre otros ajenos a su campo de investigación. No es extraño, por tanto, que los resultados de la evaluación dependan – salvo para ese 20-25 por ciento que está claro que van a ser evaluados positivamente con independencia de quien figure en la comisión, o ese otro 20-25 por ciento que también está claro que va a ser evaluado negativamente –, de quien forma parte de ella y a qué área o subárea pertenezca.

El problema académico-científico no es menos relevante. El artículo va a ser valorado, como se dijo, en función no de su contenido sino de la posición de la revista en los listados de índices de impacto, ya sean nacionales – circunscritos en este caso al ámbito de la educación y del país de que se trate –, o internacionales – referidos, por lo general, al más amplio campo de las ciencias sociales –. Con independencia del sesgado predominio anglosajón de los índices

internacionales, y de los intereses económicos que hay en juego en su elaboración y en los modos y criterios de medición, es evidente, en ambos casos, la escasa presencia y peso que tienen en ellos las revistas histórico-educativas, así como su baja valoración. La razón es obvia. Las revistas de historia de la educación no suelen ser leídas – muchas veces ni conocidas – tanto por los historiadores como por quienes investigan en el campo de la pedagogía o de las ciencias de la educación. No nos engañemos: la historia de la educación desempeña el mismo papel entre ancilar y ornamental en las facultades de educación o pedagogía que la historia de la psicología, del derecho, la medicina o la economía en sus facultades respectivas. Para quienes investigan en el campo de la educación, la historia de la educación no va más allá, como mucho, del límite temporal que establece su memoria escolar y académica. En todo caso, puede ser útil para adornar un texto o frase con una cita de o referencia a un clásico de la pedagogía. Y para los historiadores, al menos en el caso español y con todas las excepciones que quieran hacerse – por fortuna las hay –, la historia de la educación – salvo la de las universidades – es un campo ignoto por desgracia correspondido, en muchos casos, por el recíproco desconocimiento que un buen número de historiadores de la educación tienen de las publicaciones y revistas históricas. La consecuencia es obvia: el número de citas o referencias a artículos publicados en revistas exclusivamente histórico-educativas es mínimo. Y ello tanto en las revistas de educación o pedagogía como en las de historia en general o de historia política, del derecho o económica. Incluso en las de historia social, cultural o de la ciencia. La gran mayoría de las citas o referencias proceden de otras revistas histórico-educativas. Una situación asimismo apreciable en los listados, rankings o índices de impacto internacionales.

Coda

Las anteriores reflexiones no están hechas desde la nostalgia o la añoranza. Cualquier tiempo pasado no fue mejor ni peor. Fue diferente – el progreso, tal y como suele entenderse, no existe: solo hay continuidades y cambios – Y el actual ofrece, como lo ofrecieron otros, aspectos, problemas o síntomas preocupantes, a mi juicio, en relación con determinados cambios y suposiciones que se dan por válidas sin ser cuestionadas o sin que se planteen alternativas a las mismas. Dichos síntomas tienen que ver con la posible pérdida del sentido de lo que es científicamente valioso, o no, en un determinado campo de investigación. De los criterios empleados para considerar algo científicamente valioso. Como es obvio, y como sucede con la misma ciencia – sea cual sea el campo al que nos refiramos –, dichos criterios son y serán siempre discutibles. Lo que sucede es que la pretensión de objetivarlos ha originado su normalización y formalización en unos determinados criterios, y no en otros, así como la publicación de

rankings y listados, con asignación de puestos y clasificaciones en función de un supuesto impacto científico medido asimismo de un modo determinado frente a otros posibles. Si a ello se añade la presencia de intereses económicos, y por tanto de beneficios y rentabilidades en el ‘mercado’ de la ciencia – es decir, que sean criterios económicos, la lógica del beneficio y no la de la ciencia, los que determinan donde se sitúa el poder de decidir lo que es, o no, científicamente valioso –, no es extraño que se hayan empezado a oír voces que claman, de momento en el desierto, para que sea la Organización de las Naciones Unidas para la Educación, la Ciencia y la Cultura (UNESCO) la que lleve a cabo este tipo de tareas. Uno mi voz a las suyas en este texto que, como dije al comienzo, no es más que una reflexión efectuada a partir de una experiencia personal determinada. No tiene otras pretensiones.

«History of Education & Children's Literature» and the internationalization of historical-educational research in Italy (2006-2014)

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ABSTRACT: After a brief but organic illustration of the history and characteristics of the international scientific journal «History of Education & Children's Literature», the Author will focus his attention on the role played by this journal, over the last decade, in the development and the internationalization of Italian historical-educational research, and will pause to focus on the project which has characterized the journal, and the most significant outcomes obtained from the diffusion of the results of the most authoritative European and extra-European educational historiography and of the international promotion of research and studies within the sector conducted in Italy.

EET-TEE KEYWORDS: Periodical; History of Education; International Research; State of the Art Review; Young Researchers; Italy; XX-XXI Centuries.

«History of Education & Children's Literature», which will henceforth be named using the acronym HECL, is a biannual journal (it comes out every year in the months of June and December) which first came into print in 2006. It is published in both paper and digital versions, by the university press eum – Edizioni dell'Università di Macerata – and is distributed in Italy and also abroad in a digital version by Casalini Digital. Since its origin, HECL has had its own autonomous website (www.hecl.it), managed and constantly updated by the same editorial staff as the journal itself, and a double blind peer review which avails itself of the collaboration of a rich International Committee of Referees which is completely reviewed every three years.

HECL has an Executive Council composed of 8 members¹, an International Scientific board made up of 86 scholars from all over the world, and an Editorial Staff coordinated by three managers².

Each edition comprises an average of between 700 and 750 pages, making a total of 1,400 – 1,500 pages a year. It is structured on the basis of a *monographic part*, designed to host records of conventions and seminars of particular relevance, as well as collections of studies by specialists dedicated to their own subject matter relating to the history of education and children's literature; and a *miscellaneous part* characterized by four distinct sections: a) Essays and Research, b) Sources and Documents, c) Critical Reviews and Bibliography, d) Scientific Reports and Activities in Research Institutes.

The first section (Essays and Research) welcomes contributions which are the fruits of original research on different veins of research within the field of history of education and children's literature, with particular but not exclusive attention on the modern and contemporary age; the second (Sources and Documents) publishes texts, collections of documents and unedited correspondence, pertaining to the aforementioned themes. The third section (Critical Reviews and Bibliography) contains bibliography collections, interventions and notes on themes and threads of research or on publications of particular importance, as well as reviews of and recommendations for essays, and collective works. The fourth and final section, (Scientific Reports and Activities in Research Institutes) intends to: announce the activities of research centres within the fields of history of education and children's literature, both on a national and an international level; provide information regarding conferences and workshops, as well as updates on research in progress in European and extra-European countries.

Since 2013, the December edition of HECL has been enriched by an International Bibliography, actually edited by Dorena Caroli and Luigiaurelio Pomante, and compiled with the collaboration of a number of scholars and correspondents from all over the world³. It is put together through scrupulous

¹ *Pino Boero* (Università degli Studi di Genova, Italy), *Norberto Bottani* (Paris, France), *Giorgio Chiosso* (Università degli Studi di Torino, Italy), *Mariella Colin* (Université de Caen, France), *Agustín Escolano Benito* (Universidad de Valladolid, Spain), *Michel Ostenc* (Université de Angers, France), *Simonetta Polenghi* (Università Cattolica del Sacro Cuore di Milano, Italy), *Bernat Sureda Garcia* (Universitat de les Illes Balears, Spain).

² *Marta Brunelli* (Università degli Studi di Macerata, Italy), who manages the editorial processes of the journal, *Luigiaurelio Pomante* (Università degli Studi di Macerata, Italy), who is in charge of the peer-review procedures and the journal's website, and *Dorena Caroli* (Università degli Studi di Macerata, Italy), who manages the international bibliography.

³ *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* (Editorial Office of the review «Journal of Educational Media, Memory and Society», Germany), *Antonio Castillo Gomez* (Universidad de Alcala, Spain), *Anne-Marie Chartier* and *Renaud D'Enfert* (INRP – Service d'Histoire de l'Education, France), *Maria Elena Del Valle de Villalba* (Universidad Metropolitana, Caracas Venezuela), *Ines Dussel* (Facultad Latinoamericana de Ciencias Sociales, Argentina), *Agustín Escolano Benito* (Universidad

reading of over 400 international scientific journals of the field, and catalogues (monographs, miscellaneous articles and proceedings) pertaining to over 100 different specialized editors from around the world⁴.

Over the years, the journal has been flanked by an international editorial series: the *Library of "History of Education and Children's Literature"* (structured in three sections: "Studies", "Instruments/Tools" and "Bibliographical Repertoires") which, like HECL, welcomes texts in various languages and to date has published about 20 different works.

HECL is indexed by numerous national and international databases and in particular by SCOPUS of the Elsevier Editor and EBSCO; while, since 2009 it has been indexed by the Thomson Reuters ISI Web of Science (specifically the Arts and Humanities Citation Index). Currently, the journal is under evaluation by Thomson Reuters to join the highly exclusive group of journals indexed in the *Social Science Citation Index*⁵, which provides the Impact Factor (IC) calculation.

de Valladolid, Centro Internacional de la Cultura Escolar, Spain), Aslam Fataar (Stellenbosch University, South Africa), Decio Gatti Junior (Faculdade de Educacao, Universidade Federal de Uberlandia, 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 Pougariidou (University of Western Macedonia, Greece), Joaquim Pintassilgo (University of Lisbon, Portugal), Edvard Protner (University of Maribor, Slovenia), Paul J. Ramsey (Eastern Michigan University, Editor of the review «American Educational History Journal»), Rebecca Rogers (Universite Paris Descartes, France), Alla A. Salnikova (Kazan State University, Russia), Bengt Sandin (Linkoping University, Sweden), Joanna Schiller-Walicka (Redaction of the review «Rozprawy z Dziejow Owiaty», Poland), Juan Senis Fernandez (University of Saragoza, Spain) Veronica Sierra Blas (Universidad de Alcala, Spain), Chandralekha Singh (Zakir Husain Centre for Educational Studies, Jawaharlal Nehru University, New Delhi, India), Larisa Smirnova (redaction of the review «Istoriko-Pedagogichesky Zhurnal», Russia), Wendelin Sroka (Reading Primers Special Interest Group of the International Society for Historical and Systematic Research on Schoolbooks, Germany), Cathryn Steele (Publisher House: Oxford, Oxford University Press, UK), Claudia Tatasciore (Ph.D., University of Bologna), Milka Terzijska (Sofia University «St. Kliment Ohridski», Bulgaria), Johannes Westberg (Uppsala University, Sweden), Cristina Yanes (Universidad de Sevilla, Spain), Christian Ydesen (Aalborg University, Denmark).

⁴ Cfr. D. Caroli, R. Sani (edd.), *International Bibliography of History of Education and Children's Literature (2010-2012)*, Macerata, eum, 2014; D. Caroli, L. Pomante (edd.), *International Bibliography of History of Education and Children's Literature (2013)*, Macerata, eum, 2015.

⁵ The journal is also indexed in: ACNP – Catalogo Italiano dei Periodici Bibliografia storica nazionale; ERIC – Education Resources Information Center; ESSPER – periodici italiani di economia, scienze sociali e storia; GOOGLE Scholar; Historical Abstracts; Ulrich's Periodicals Directory; EIO – Editoria Italiana On Line; GENAMICS – JournalSeek; NOVA – University of Newcastle (Australia); Banca dati riviste – Istituto internazionale F. Datini; Rivista di Storia della Chiesa in Italia; Progetto Riviste On Line; Storia Moderna (<<http://www.stmoderna.it>>); and,

Since its origins, HECL has collected and published articles in English, French, Spanish, German and Portuguese, as well as, of course, in Italian. Relative to the period 2006-2014, the percentages of edited articles in the above languages were as follows:

- articles in English = n. 235 of a total of 482 (equal to 48.7%)
- articles in Italian = n. 188 (39%)
- articles in French = n. 29 (6%)
- articles in Spanish = n. 22 (4.5%)
- articles in German = n. 7 (1.4%)
- articles in Portuguese = n. 1 (0.2%)

The contributions to the journal offered by foreign scholars have been just as relevant, since the beginning:

- Foreign authors = n. 250 of a total of n. 582 (equal to 42.9%);
- Extra-European authors = n. 71 (equal to 12.1%)⁶.

HECL developed from a will to create a scientific journal of the sector, which was capable of overcoming national barriers, and to achieve an articulate and undoubtedly ambitious programme, which could be summed up in the following points: to establish organic connections between specialists within the sector and research groups operating in various European countries; to favour a fruitful and indispensable debate regarding methodological and historiographical planning, as well as an equally important interdisciplinary approach to the issues which are the object of study; to contribute to the diffusion of the most significant results of investigations conducted at both national and international levels; finally, to give an account of the activities of institutions and specialist organizations which, in Europe and in other continents, operate in the fields of documentation and research into the history of education, considered in its widest definition, and the history of children's literature.

Moreover, the idea of giving life to a scientific journal with a marked international objective, published mainly in English and indexed in the world's

more recently, by the European Reference Index for the Humanities (ERIH-Plus) operated by the Norwegian Social Science Data Services.

⁶ To demonstrate the genuine international vocation of the journal we *point out* the nationality of the Authors who collaborated with the journal in the years 2006-2014: Italy = n. 330 (from an amount of 582); Spain = n. 52; France = n. 35; Russia = n. 22; Belgium = n. 18; Brazil = n. 14; USA = n. 11; Germany = n. 9; Hungary = n. 8; China = n. 6; United Kingdom = n. 5; Argentina = n. 4; Portugal = n. 4; Switzerland = n. 4; Greece = n. 3; Sweden = n. 2; Australia = n. 1; Austria = n. 1; Bangladesh = n. 1; Bosnia = n. 1; Czech Republic = n. 1; Colombia = n. 1; Croatia = n. 1; Ecuador = n. 1; Finland = n. 1; Japan = n. 1; Iran = n. 1; Luxembourg = n. 1; Macedonia = n. 1; Malaysia = n. 1; Mexico = n. 1; Mongolia = n. 1; Montenegro = n. 1; Netherlands = n. 1; Poland = n. 1; Romania = n. 1; Serbia = n. 1; Slovakia = n. 1; Slovenia = n. 1; Turkey = n. 1. Obviously the number of the authors does not coincide with that of the published articles, since some contributions are co-authored.

principal databases, was triggered by two precise convictions, which – according to the writer – still today preserve their indisputable validity.

The first – which had developed well before the debate on the evaluation and internationalization of research in Italy began and before the National Agency of Evaluation of the University and Research Systems was founded (Act of 24 November 2006, n. 286, art. 2) – reflected the knowledge that in the sphere of history of education and children's literature (the problem, naturally, concerned other fields of pedagogical sciences as well as humanities and social areas) there were no scientific journals of the field with authentic international characteristics indexed in the principal databases (ISI, SCOPUS etc.) which were able to attract contributions from the most qualified foreign researchers or to propose authoritative points of reference not only for the national but also the European and extra-European scientific community⁷.

In times of growing and irreversible internationalization of historical-educational research, the risk we ran in Italy is that in the long run, there would be a sort of forced “offshoring” or relocation of the channels and tools of dissemination of the research results within our sector of study, with the capacity to significantly influence threads of investigation and condition the selection of the products of research⁸.

In other words, the absence of Italian scientific journals among those of history of education and children's literature indexed in the principal international databases⁹ made the circulation of Italian studies at an international level quite problematic, and to all intents and purposes, marginalising, while at the same time, Italian scholars who aspired to project their research beyond national confines were thus obliged to undergo selection criteria for their articles to be published which were decidedly far from our standards.

⁷ Cfr. R. Sani, *La valutazione della ricerca nell'ambito delle Scienze dell'educazione: un problema di metodo*, «Education Sciences & Society», vol. VI, n. 2, 2011, pp. 176-190.

⁸ Such a concern is well-founded, as confirmed by the recent analysis carried out on this theme by G. Bandini, *La dimensione internazionale della ricerca storico-educativa: considerazioni su una trasformazione in atto*, 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. II, pp. 43-66; Id., *Generazioni pedagogiche: cambiamento e continuità attraverso l'analisi dello stile di pubblicazione degli storici dell'educazione*, in M. Corsi (ed.), *La ricerca pedagogica in Italia. Tra innovazione e internazionalizzazione*, Lecce-Brescia, Pensa MultiMedia, 2014, pp. 385-394; Id., *Le riviste internazionali nella classificazione Anvur. I nodi da sciogliere. International Reviews Inside the Anvur Classification. The Problems to Solve*, in S. Ulivieri, L. Perla (edd.), *Riviste pedagogiche e qualità della ricerca*, «Pedagogia Oggi», vol. VI, n. 2, 2014, pp. 33-45.

⁹ Among the many scientific journals of the field, which are indexed in the principal international databases, we will just mention: «History of Education. Journal of the History of Education Society» (Taylor & Francis Group – United Kingdom), «Paedagogica Historica. International Journal of the History of Education» (Taylor & Francis Group – The Netherlands), «Estudios Sobre Educación» (Universidad de Navarra – Spain), «History of Education Quarterly» (Wiley Online Library – Usa), «Historical Studies in Education/Revue d'Histoire de l'Éducation» (Association Canadienne d'Histoire de l'Éducation – Canada), «History of Education Review Journal» (Australian & New Zealand History of Education Society – Australia).

The second conviction concerned, and concerns now, the role that the research group, which promoted HECL, proposed, and still proposes, to carry out. In 2006, the year in which HECL began its publications, almost the entire total, if not a decidedly large part of scientific production (articles, monographs etc.) of the field of history of education and children's literature of the peninsula was published in Italian, in journals and editorial series that did not have a place on international databases. In short, this scientific production was totally ignored outside national borders, and as such, did not participate in any way in the international historical-educational debate.

The creation of HECL testifies to the ambition of a group of Italian historians of education and children's literature who collaborate in order to carry out a primary role in the renewal of the research in the sector at international level and to create a point of reference for European and extra-European scholars of this discipline. In other words, to ensure an authentically international role and presence within the investigation into the history of education and children's literature conducted in Italy; this means guaranteeing, in times of accelerated and ever increasing globalization of studies not just within this sector but in the whole of the complex humanistic field, the possibility of historical-educational and children's literature research which, within an international scenario, reflects the work and the experiences of both individual researchers and teams of scholars of Italy.

Among the many indicators that testify, without a shadow of a doubt, to the notable contribution made by HECL, not only to the potential, but also and above all, to the internationalization of Italian research within the sector of history of education and children's literature, we will limit ourselves to naming only two.

The first indicator is the growing use of the English language by Italian authors. With reference to the period 2006-2014, a good 43% of articles published in HECL by Italian scholars were written in English. If we examine the data relative to the single years of the journal, we can establish with certainty that over the last decade, the use of English for the publication of research results has seen a constant increase, from 21.7% in 2006 to 42.8% in 2010, up to 57.4% in 2014, testimony to an ever-widening diffusion of the need to project the results of one's research at international level.

The second indicator refers to the role carried out by HECL with regard to the indexing, by the ISI Thomson Reuters Web of Science, of articles and research contributions by Italian historians of education and children's literature. If one takes as a point of reference the complex of tenured researchers and professors in Italian universities within the scientific discipline M-PED/02 (History of Pedagogy)¹⁰, the emerging data shows that only 37.7% of them (or rather 34

¹⁰ In the Italian university system, the scientific sector M-PED/02 (History of Pedagogy) includes all the full- and associate professors as well as the tenured researchers teaching History of Education and History of Children's Literature.

of a total of 90) are present on the ISI Thomson Reuters Web of Science, and of these, 67.6% (or 23 of 34) are present due to having been published in HECL.

If one breaks down this data into type of teaching staff (full professors, associate professors and researchers/lecturers), one discovers that the number of full professors present on the Thomson Reuters ISI Web of Science is equal to 51.8% of the total (14 of 27), and that 71% of them, or 10 of 14, are indexed in that database thanks to articles published in HECL. Regarding the associate professors of the sector only 34.6%, or 9 of 26, were authors of articles indexed in the Thomson Reuters Web of Science database, 55.5% of them had come to light through HECL. Finally, concerning the researchers, the data indicates that of the 29.7% (or 11 of 37) who are indexed, with one or more articles, in ISI Web of Science, 72.7% (8 of 11) are present as a result of their articles appearing in HECL¹¹.

Of particular significance, in that it allows us to take a look at the orientations and the aspirations of the younger generations, is the data relating to the researchers in history of education and children's literature who do not yet have an official university role (doctoral students, PhD, temporary research fellows, temporary researchers etc.) but who are already well known within the Italian scientific community for their contributions to research (journal articles, essays, monographs etc.) and for their participation in conferences and seminars on both a national and an international scale¹².

Of the 44 young Italian scholars that we analysed, 22 (50%) have contributions indexed by ISI Web of Science, which in almost all cases (95.4%) refer to articles published in HECL¹³, confirming privileged consideration given to this journal by the newcomers in the research world in this field. This data is without a doubt encouraging, and leads us to look with optimism not only at the present but also the near future.

¹¹ At the time of our survey, the presence of the academic ranks was as follows: full professors = n. 27; associate professors = n. 26; tenured researchers = n. 37 (<<http://cercauniversita.cineca.it/php5/docenti/cerca.php>>, accessed: January 8, 2015). The last survey in the ISI Web of Science was carried out on the days 8-10 January 2015.

¹² The young scholars and researchers in History of Education and in History of Children's Literature, who are currently not in a permanent position yet, and which we referred to when analysing the ISI Web of Science database, are the following: Rossella Andreassi, Paolo Alfieri, Silvia Assirelli, Davide Boero, Rossella Caso, Giovanni U. Cavallera, Valentina Chierichetti, Anna Debè, Laura Detti, Caterina Donaggio, Domenico Elia, Francesca Farinelli, Gianluca Gabrielli, Daria Gabusi, Elisa Gori, William Grandi, Stefano Lentini, Luisa Lombardi, Fabiana Loparco, Elisa Marazzi, Andrea Marrone, Ilaria Mattioni, Elisa Mazzella, Chiara Meta, Valeria Miceli, Luca Montecchi, Matteo Morandi, Martino Negri, Valentina Oldano, Florindo Palladino, Francesca Davida Pizzigoni, Luigiaurelio Pomante, Luca Puglielli, Benedetta Quadrio, Rossella Raimondo, Cosimo Rodia, Cristina Saggiocco, Raffaella Strongoli, Elena Tabacchi, Fabio Targhetta, Maria Teresa Trisciuzzi, Laura Vanni, Valeria Viola, Fabiola Zurlini.

¹³ The survey in the ISI Web of Science database was carried out on the days 8-10 January 2015.

*Nineteenth- and twentieth-century schools as
a laboratory for the promotion
of national identity and citizenship education
Part One*

Call for Papers for the 10th anniversary of the journal
«History of Education & Children's Literature» (2006-2015)

edited by
Roberto Sani

Citizenship education in Switzerland before, during and after the First World War*

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ABSTRACT: Citizenship education was intensively discussed during the 1910s. Patriotic ideals and the love of the fatherland were described with diligence in teachers' journals. After the outbreak of the World War I, Swiss teachers reacted immediately to the new circumstances and published lessons in their weekly teacher journals for every day of school for different grade levels. These lessons comprised current events and civic education as well as didactical instructions for the teacher. In pupils' essays, citizens are often depicted as religious members of society who are industrious and hardworking, whereas in the journals, religious aspects are related to peace but not to citizenship education. As a multilingual and neutral country, Switzerland struggled with major domestic problems due to the cultural conflict between the French- and the German-speaking regions, especially during wartime. However, teachers promoted unity from the beginning. Therefore, changes and continuities during this decade concerning citizenship education are of crucial research interest. The practical sections of teachers' journals, including lessons and didactical instructions, and pupils' essays provide insight into what happened in the classrooms. Which forms of national identity and citizenship were taught in classrooms before, during and shortly after WW1 in public schools in Switzerland? How did pupils describe the current issues of war and citizenship?

EET-TEE KEYWORDS: Civics; Cultural Identity; Nationalization; Teachers' Journal; Switzerland; XX Century.

* I would like to thank Dr. Rebekka Horlacher for her comments and suggestions regarding a first draft of this text.

Introduction

After the turn of the 20th century, Switzerland's economy expanded after a brief interruption, and Switzerland became a significant economic power with prospering industries, tourism and banking. Because of this economic growth, towns expanded rapidly, as did the population. However, conditions for workers were difficult and led to a growing number of strikes between 1900 and 1914¹. Nationalism based on ethnicity increased throughout Europe. Particularly in Switzerland, new linguistic divides emerged².

Citizenship education was broadly discussed during the 1910s, not only because of the international promotion of nationalism but also because of internal political tensions and new political challenges in Switzerland³. Shortly after the outbreak of World War I in 1914, the internal political conflicts of the two main cultures of Switzerland, the French-speaking and German-speaking cultures, grew so severe that even the Swiss federal council appealed for moderation⁴. The divided cultural loyalties («fossé moral», «Röstigraben») had been discussed before the outbreak of the war, but with the new political circumstances, the situation worsened. At the beginning of the war, the Swiss-French-speaking region of Switzerland supported France, and the Swiss-German-speaking region supported Germany. Teachers are important because they educate future citizens; therefore, their reactions are of crucial research interest. In this case, teachers responded immediately and promoted unity from the beginning of the war. Therefore, the following questions are raised: which forms of national identity and citizenship were taught in the classrooms before, during and shortly after WW1 in public schools in Switzerland? How did pupils describe the current issues of war and citizenship? Through an analysis of these questions, changes and continuities in the time period of the 1910s can be analyzed with a focus on the differences and similarities between the Swiss-French and Swiss-German regions. In addition to the questions raised regarding the primary issue at stake – national identity and citizenship education – are issues regarding reactions to the fossé moral of the two main cultures and insights into what was taught in the classrooms. Researchers have explored daily newspapers, including their roles as actors for the ideas of the elite, but there are surprisingly few published examinations of schools

¹ C. Church, R.C. Head, *A Concise History of Switzerland*, Cambridge, University Press, 2013, pp. 184-189.

² R. Ruffieux, *Die Schweiz des Freisinns (1848-1914)*, in J.-C. Favez (ed.), *Geschichte der Schweiz und der Schweizer*, Basel, Schwabe, 2006, pp. 639-730, 705-706.

³ C. Crotti, *Schweizer sein. Die Nationalisierung der Jugend. Politische Bildung im öffentlichen Bildungssystem*, in C. Crotti, F. Osterwalder (edd.), *Das Jahrhundert der Schulreformen. Internationale und nationale Perspektiven, 1900-1950*, Bern, Haupt, 2008, pp. 223-247, 224.

⁴ M. Cerutti, *Erster Weltkrieg, Innenpolitik*, in *Historisches Lexikon der Schweiz* (from now on cited as: HLS), Last modification: 17.10.2013, <<http://www.hls-dhs-dss.ch/textes/d/D8926.php>> (accessed: June 30, 2014).

and the war at large⁵, and there are no studies that specifically examine war, citizenship education, divided cultural loyalties and insights into classrooms in Switzerland. School is implicated in the «conduct, resistance, and aftermath of wars»⁶. Therefore, in this study, the two main teachers' journals, «L'Éducateur» and the «Schweizerische Lehrerzeitung», are analyzed from 1910 to 1919.

The main sources for this investigation are the practical sections of the two main teachers' journals in Switzerland: the journal «L'Éducateur»⁷ for the French-speaking regions and the «Schweizerische Lehrerzeitung»⁸ for the German-speaking region. The practical sections included public school lessons for various education levels as well as instructions or didactic advice for teachers. The topics of war/peace and civics⁹ were the focus. During 1910-1919 in «L'Éducateur», 178 lesson or didactical instructions were published, and 37 were published during this period in the «Schweizerische Lehrerzeitung». Furthermore, 26 student essays provide insight into what juveniles thought about peace/war in the 1910s. In addition to these sources, the main sections of both journals were consulted to obtain information about the issues investigated in the practical sections, and 285 texts in «L'Éducateur» and 275 in the «Schweizerische Lehrerzeitung» about war/peace and civics were considered.

In February 1917, «L'Éducateur» made an inquiry about the *practical sections* of the journal and asked teachers, among others, if they used the lessons suggested in the journal. The teachers confirmed that they did, but they mentioned that some lessons were too lengthy and had to be presented in a more concise way¹⁰. The inquiry demonstrated that the lessons were used in everyday school life but were sometimes modified, and at least some didactical instructions were considered.

To answer the question about citizenship education in the 1910s in Switzerland, in chapter 2, the teachers' journals are analyzed regarding the topics of *war/peace* and *civics* in lesson sequences and didactic advice. Findings regarding military education, negative and positive effects of war and peace, daily conditions in Switzerland, national unity, neutrality, and patriotism

⁵ E. Blair, R. Miller, M. Casey Tieken, *Editor's Introduction*, in E. Blair, R. Miller, M. Casey Tieken (edd.), *Education and War*, Cambridge, Harvard, 2009, p. 2.

⁶ *Ibid.*, p. 1.

⁷ «Éducateur et bulletin corporatif: organe hebdomadaire de la Société Pédagogique de la Suisse Romande, *Éducateur*», available in *Retro.Seals.ch. Swiss electronic academic library service*, <<http://retro.seals.ch/digbib/vollist?UID=edu-001>> (accessed: March 3, 2015).

⁸ The «Schweizerische Lehrerzeitung», like «L'Éducateur», was published weekly during the time period investigated. Both were official newspapers of the teachers' union: «L'Éducateur» of the French-speaking region of Switzerland and the «Schweizerische Lehrerzeitung» of the German-speaking region. Both journals had several thousand subscribers.

⁹ The term *civics* includes all subjects (e.g., history, linguistics, geography) that contain aspects of citizenship education. Thus, *civics* is used in a comprehensive manner.

¹⁰ J. Magnin, *Aux lecteurs de la Partie pratique de l'Éducateur*, «L'Éducateur», n. 8, 1917, pp. 118-120.

with its morals and virtues are explained to present a picture of the citizens of that time and their education. Chapter 3 provides insight into the thoughts of 26 juveniles about war and peace in 1915 from essays in *Desires for Peace* («Friedenswünsche»). It can be assumed that some of the ideas of that time are discussed in these essays and can be analyzed concerning the findings in chapter 2 as well as with regard to ideas in the literature. In chapter 4, the main findings are distilled concerning education and war, and these findings are deepened with literature about the military, European nationality, patriotism, neutrality, national unity and the language of education.

1. *School lessons and teachers' instructions*

National identity and citizenship education of the 1910s can be understood through school lessons and teachers' instructions about *war/peace* and *civics*. Specifically, the divided loyalties of the two main cultures and what was taught in the classroom are the focus for information about the specific circumstances of that time and the effects on education. The practical sections of the teachers' journals contain *dictations* for low, middle and high public school levels and *essays*, *poems* and *civic lessons* for school subjects such as civics, history and geography. The numbers of articles on both subtopics – *war/peace* and *civics* – immediately increased in 1914, but long before the end of the war, a rapid decline can be observed. It seems that the authors grew war-weary and civics-saturated, were busy with other subjects or had the impression that the previous lessons were sufficient. The same decline after 1915 can be observed in the main section of both journals with the same topics.

In «L'Éducateur», among the total number of lessons (N=178), 52 are about *war/peace*, 37 are about *civics*, and 89 are about *war/peace AND civics*. Thus, both topics could be simultaneously covered very well. In particular, in 1914 and 1915, a high number of lessons relating to both issues were published (N=19 and N=32, respectively). The year 1914 is of special interest because of the outbreak of the war. In total, 39 practical inputs were given in «L'Éducateur» about the topics of *war/peace* and/or *civics*. Twenty-five lessons were printed after the mobilization of the Swiss army on August 1 and fourteen before this time (see figure 1¹¹). The immediate increase after

¹¹ In comparison with the practical section of «L'Éducateur» (N=178), the Swiss-German teachers' journal provided its teachers with considerably fewer lessons (N=37). There can only be speculation regarding why there were fewer lessons in the «Schweizerische Lehrerzeitung». This journal's practical section was in a separate issue that appeared more or less once per month but in some years only four times, such as in 1919. In contrast, in «L'Éducateur», the practical section was part of the weekly edition and was therefore printed roughly 50 times per year. In addition, there were extensive discussions in the German-speaking region about teaching materials for



Fig. 1. Lessons about peace/war and civics for public schools in «L'Educateur», 1914.

the outbreak of the war indicates that «L'Educateur» reacted promptly to the new circumstance, with lessons and didactic advice to guide teachers on how to address current events at school. In the main sections of both journals, the same topics had the same immediate increase.

The first subsection of this chapter focuses on questions about citizenship education in the 1910s with regard to *peace/war*. In the second subsection, *civics* education is analyzed with various subtopics. In the third subsection, the

citizenship education, which may have affected the practical section of the journal. Moreover, this inequality may be explained by the fact that throughout the 19th century in the canton Vaud, where «L'Educateur» was published and had its most subscribers, civics was more closely connected to the schools. It had its own teaching materials and was outlined in the law as its own subject. In contrast, in the canton Zurich, where the «Schweizerische Lehrerzeitung» was published and had its most subscribers, civics was not its own subject in schools (R. Horlacher, *Alternative Conceptions of Civic Education in Switzerland: The Cantons of Zurich and Vaud in the 19th Century*, in Th. Lenz, A. Rostock, P. Voss (edd.), *Curriculum Studies Worldwide*, (forthcoming). Thus, teaching aids for teachers were different. Although the structures of both journals differed and the quantity of the different issues cannot be compared, the content is of crucial importance, and comparisons can be made on this level. Therefore, both sources are valuable.

teacher inquiry from 1917 about the influence of war on children is summarized to present information on what contemporary people thought about the effects of war on children and about the country's future citizens.

1.1. *Peace and war in relation to education, 1910-1919*

The assassination of the Archduke Franz Ferdinand in Sarajevo on June 28, 1914 led to various peace interventions but ended in a declaration of war by Austria on Serbia, the mobilization of the Russian army, and the declaration of war by Germany on Russia¹². On August 1, 1914, the Swiss Federal Council directed the general mobilization of the Swiss army¹³.

The topic of war appeared in lessons from 1910 to 1919 as part of diverse subjects. Negative aspects of the war were described from the beginning of the time period investigated, but they increased after the outbreak of the First World War, and the total number of texts about war/peace and civics increased as well. Additionally, until the end of the war, certain carefree aspects of the war can be identified, perhaps to allow children some lighthearted time in the context of war. Before the outbreak of WW1, some lessons stressed the circumstances of war in historical, heroic terms¹⁴. Educationally, the lessons were related to virtues¹⁵ or to current events, such as the visit by the German emperor in 1912 to Switzerland, with didactic advice in *The Swiss Confederates at the King's Place and the Emperor at Ours* («Die Eidgenossen beim König und der Kaiser bei uns»)¹⁶. Along these lines, a book written by Tony Borel called *Une Ambassade Suisse à Paris, 1663* and printed in 1910 was used as a starting point for one teacher to suggest to his colleagues 12 lessons for 13-year-old pupils in the «Schweizerische Lehrerzeitung». In general, victorious battles¹⁷ glorified Switzerland's past, including during the First World War. These texts helped to preserve virtues or, in contrast, to severely condemn army deserters

¹² G. Wagnière, *La Suisse et la Grande Guerre. Notes et souvenirs*, Lausanne, Payot, 1938, pp. 21, 25, 61.

¹³ R. Jaun, *Vorwort*, in J.-J. Langendorf, P. Streit, *Ein bedrohtes Land. Das Schweizer Volk und seine Armee während der beiden Weltkriege*, Gollion, Infolio, 2010, p. 9.

¹⁴ See, e.g., P. Chapuis, *Le défilé de l'armée bourguignonne*, «L'Educateur», n. 20, 1911, pp. 315-316.; Alb. Chessex, *Vaud à l'approche des alliés*, *ibid.*, n. 9, 1911, p. 142.

¹⁵ See, e.g., F. Meyer, *L'amour de la liberté, Partie pratique, Instruction civique*, *ibid.*, n. 5, 1911, pp. 77-80; A. Bataillard, *Le soldat pieux, Partie pratique*, *ibid.*, n. 40, 1912, p. 598; P. Decker, *Notre époque héroïque, Partie pratique, Civilisation*, *Ibid.*, n. 44, 1912, p. 662; A. Grandjean, *Fraternité*, *ibid.*, 43, 1914, 3; *La Patrie*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 21», n. 5, 1913, p. 27.

¹⁶ *Die Eidgenossen beim König und der Kaiser bei uns*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 8», n. 2, 1913, pp. 10-11; *ibid.*, n. 3, 1913, pp. 13-14.

¹⁷ See, e.g., J. Magnin, *Un jeune Suisse dil y a 600 ans*, «L'Educateur», n. 45, 1915, pp. 655-656; H. Hasenfratz, *Das Soldatenchristkind*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 52», n. 8, 1914, p. 39.

as cowards who dishonored their parents¹⁸. Through 1915, lessons that glorify war can be found¹⁹, but the longer the war lasted, the fewer articles and topics directly glamorized war.

There was a very close connection between the army and the schools, two public institutions that educated future citizens. In both of the teachers' journals, pedagogic exams for military recruitment were printed with all specific formulations through 1914 in «L'Éducateur» and through 1915 in the «Schweizerische Lehrerzeitung»²⁰. The exams appear to have been very important; in the German-speaking journal, «Schweizerische Lehrerzeitung», more than one-third of all lessons from 1910 to 1915 involved these exams²¹. In general, the Swiss army remained significant in both journals throughout 1910-1919 in different school subjects. For example, in 1910, the army's functions were explained in National Defense («La défense nationale»)²². In 1915, in A Young Soldier («Ein jung Soldat»)²³, the mobilization, a children's war game and the horrors of war were presented, and in 1919, A German Military Barrack in Mulhouse («Une caserne allemande à Mulhouse»)²⁴ was published. Although most texts about the Swiss army were enthusiastic, in 1912, the topic for an essay for pupils in upper primary levels was the abolition of the army, which was postulated in a fictitious letter with a response regarding why the army was important²⁵. In 1915, in a dictation, pupils were taught the qualities of good soldiers:

The army is an admirable organization. For its proper functioning, harsh discipline is required. Thus, obedience is the first quality of a soldier. However, in addition to this, he must be agile, skillful, enduring, and brave. It is at school where children can acquire all of these physical and moral qualities and strengthen their will²⁶.

At the time, the teachers' journals published this dictation, the war had lasted already for more than one year. None of the subject matter demonstrates

¹⁸ L.-A. Rochat, *Le mauvais soldat*, *ibid.*, n. 46, 1915, p. 669.

¹⁹ See, e.g., J. Magnin, *Le soldat, Partie pratique*, *ibid.*, n. 29, 1915, p. 464; J. Magnin, *Sixième centenaire de Morgarten*, *ibid.*, n. 45, 1915, pp. 649-651.

In the «Schweizerische Lehrerzeitung», texts that glorify war can be found in the main section: see, e.g., *Kriegs- und Friedensmuseum in Luzern*, «Schweizerischen Lehrerzeitung», n. 26, 1911, p. 246; L.B., *Eine Heimfahrt in ernster Zeit*, *ibid.*, n. 37, 1914, pp. 354-355; A. Mantel, *Zum Jahrestag der Schlacht bei Morgarten*, *ibid.*, n. 45/46, 1915, pp. 387-390, p. 395.

²⁰ The pedagogic exams for military recruits were conducted until 1914. In the «Schweizerische Lehrerzeitung», the exams from 1914 were printed in 1915.

²¹ From 1910 to 1915, approximately 21 lessons can be identified, 9 of which were about pedagogic exams for military recruits.

²² C.S., *La défense nationale*, «L'Éducateur», n. 9, 1910, pp. 137-141.

²³ E. Wechsler, *Ein jung' Soldat*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 50», n. 12, 1915, pp. 48-50.

²⁴ B. Vallotton, *Une caserne allemande à Mulhouse*, «L'Éducateur», n. 18, 1919, p. 287.

²⁵ A. Bataillard, *Le service militaire*, *ibid.*, n. 40, 1912, pp. 597-598.

²⁶ J. Magnin, *Qualités du bon soldat*, *ibid.*, n. 36-37, 1915, p. 522. Own translation.

critique about the strong interconnection between education and the army, but in January 1916, civics (among other topics) stressed that the aim was not to educate pupils about war: «When we think about how we are preparing the young people only for the purpose of war, it horrifies us»²⁷. In the «Schweizerische Lehrerzeitung», the army was also cited as very important, but in direct connection to school in the main section²⁸ and not in the lessons or the didactic advice. Nevertheless, the idea that good students would become brave soldiers and the crucial importance of morals and virtues were similar in both journals.

In the first lessons after the outbreak of the war in September 1914, a kind of war enthusiasm can be perceived. For example, in the essay's manual *Distribution of the National Flag* («Distribution des drapeaux»), patriotic feelings were emphasized using detailed descriptions of the mobilization of the Swiss army²⁹.

Many lessons can be found about cruelties attributable to the First World War, suggesting that current events were taught in the classrooms. In those texts, fears, hopelessness and sadness were described³⁰, the deaths of relatives, cruel fights and injuries were depicted³¹, and the starvation of those who lived in warring countries³², the plights of refugees and the cultural and economic disaster that led to grief and pain were stressed³³. Teachers also received advice that current events had to be explained in school, but these events did not always need to be terrifying³⁴ and were to be presented with the awareness that Switzerland was a neutral country³⁵. In this context, the following six essay proposals should be considered:

²⁷ E. Visinand, *Le civisme à l'école complémentaire*, *ibid.*, n. 2, 1916, pp. 31-32. Own translation.

²⁸ See, e.g., *Turnunterricht in der Schule*, «Schweizerischen Lehrerzeitung», n. 10, 1912, pp. 94-95; Hs.H., *Vaterlandskunde und militärischer Vorunterricht*, *ibid.*, n. 34, 1914, pp. 329-330; Ed. Schuster, *Militärische Disziplin und Schuldisziplin*, *ibid.*, n. 40, 1915, pp. 343-345; H. Siegrist, *Schule und Militär*, *ibid.*, n. 48, 1916, pp. 427-428; Fr. Frauchiger, *Die schweizerische Nationalspende und die Schule*, *ibid.*, n. 28, 1918, pp. 223-224; H.H. *Militärischer Jugendunterricht*, *ibid.*, n. 31, 1919, pp. 226-228.

²⁹ J. Magnin, *Distribution des drapeaux*, «L'Éducateur», n. 38, 1914, p. 573.

³⁰ See, e.g., E. Wechsler, *Weihnachtsglaube*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 50», n. 12, 1915, p. 45; *Weihnachten im Felde*, n. 12, 1915, p. 45; H. Meyer, *Der Weihnachtsstern*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 51», n. 10, 1917, p. 29.

³¹ See, e.g., J. Magnin, *Après la bataille*, «L'Éducateur», n. 3, 1915; 42; L.-A. Rochat, *Les dernières cartouches*, *ibid.*, n. 23, 1915, 622-623; E. Wechsler, *Ein jung' Soldat*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 50», n. 12, 1915, pp. 48-50; H. Barbusse, *Une attaque*, «L'Éducateur», n. 2, 1918, p. 26.

³² See, e.g., J. Magnin, *Le siège de Paris*, *ibid.*, n. 3, 1915, p. 43.

³³ See, e.g., H.-L. Bory, *Suisse debout*, *ibid.*, n. 49, 1915, p. 713; C. Allaz-Allaz, *Rôle de la Suisse dans la guerre actuelle*, *ibid.*, n. 31-32, 1916, pp. 473-476; P. Loti, *Un cimetière de soldats sur le front*, *ibid.*, n. 10, 1917, p. 182.

³⁴ See, e.g., F. Guex, *L'enseignement et la guerre*, *ibid.*, n. 12, 1916, pp. 183-184.

³⁵ See, e.g., *Krieg und Schule*, «Schweizerische Lehrerzeitung», n. 41, 1914, p. 388.

Essays:

The small war. (Boys.) You have played this game without doubt; describe it. (The two sides, the chiefs, the weapons, the tambour, the flag, the battle, the shouts, the assault, the victory.)

What we have done for our soldiers. (Girls.) Indicate what local women and girls have done for the soldiers who are watching our borders.

A rifle. (Boys.) Describe (very short for young pupils) the different parts of a military rifle. An act of war. You have read a war story; tell it.

The flag. Describe the flag of a battalion. (National emblem, guarding the flag, honors, defense of the flag, respect we must show it.)

The transition of a Belgian refugee train. The train arrives at the station, cooperativeness of the population, police measures, refugees, provided supplies, reflections³⁶.

The six essay propositions precisely summarize some of the positive or more or less lighthearted aspects of the war, similar to other lessons in both teachers' journals. Children were taught about the political and social circumstances, Switzerland's special situation and nationality.

In 1916, Swiss Federal Councilor Hoffmann and US President Wilson engaged in multiple peace initiatives but failed. Thus, Switzerland could not hope to pursue a policy of active neutrality but was able to play a useful role in humanitarian operations, such as the exchange of wounded prisoners through Swiss territory³⁷.

Peace as an ideal in citizenship education is treated in the practical section of the German-speaking journal completely differently and more broadly than it is in the French-speaking journal, in which peace is rarely mentioned, and only critically in relation to liberty³⁸. Nearly one-sixth of all lessons in the *practical section* of the «Schweizerische Lehrerzeitung» are about *peace*: one is before the outbreak of the war in 1910, and the other five are from 1915 to 1919. Most of these lessons were published around Christmas, so they generally relate to religious aspects, and virtues and liberty are stressed³⁹. In the *practical section* of «L'Éducateur», peace is a topic in only two lessons in 1910 and March 1914, that is, before the outbreak of the war.

³⁶ J. Magnin, *La guerre (sujets divers)*, «L'Éducateur», n. 3, 1915, p. 42. Own translation.

³⁷ F.W. Dame, *Continuity and Change in Swiss Neutrality from 1815 to 1980. An Analysis*, Saarbrücken, Dame, 1981, p. 164.

³⁸ A. Chessex, *Le soir d'une bataille (Leconte de Lisle)*, *ibid.*, n. 13, 1910, pp. 206-208; P. Chapuis, *La défense nationale*, *ibid.*, n. 11, 1914, pp. 172-173.

³⁹ See, e.g., *Und Friede auf Erden*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 51», n. 12, 1910, pp. 73-76; G. Hausmann, *Weihnachtsbitte*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 50», n. 12, 1915, p. 47; *Der Weihnachtstraum, Weihnachten*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 51», n. 4, 1919, p. 13.

1.2. *Civic education in the 1910s*

Just after the outbreak of the war, the daily newspapers in the French-speaking region of Switzerland condemned the German violation of Belgian neutrality in the strongest terms, whereas the Swiss-German newspapers denounced it as well but justified the German invasion as a necessity of the situation⁴⁰. However, already before the outbreak of the war, Swiss officers had discussed with the German and Austrian general staffs what actions would be taken in case of a French attack. Although such arrangements did not jeopardize Swiss neutrality, they did indicate that the Swiss-Germans' sympathies lay with the Germans⁴¹. However, the *Röstigraben* between the two Swiss main cultures grew deeper, and many politicians, army members and intellectuals appealed to moderation, to demonstrations of national unity and to withholding sympathies for warring countries⁴².

National unity was promoted very strongly in the main sections of both Swiss teachers' journals. Especially after the outbreak of the war, when daily newspapers fueled the internal political conflicts of the Swiss-French and Swiss-German regions, both journals invoked national cohesion and, in particular, implored teachers to set examples and to educate their pupils to become national citizens. Some of the articles in the main sections of both journals were exactly the same⁴³. Foremost in «L'Éducateur», unity was advocated through different subjects, such as geography⁴⁴ in 1910 and a dictation called Our army («Notre armée»)⁴⁵ and civics in 1912⁴⁶. For example, just before the outbreak of the war in May 1914, a «Historic and Moral Dictation» emphasized unity in relation to Switzerland's specific history to encourage one nation: Niklaus von Flüe⁴⁷ and his speech to the members of Parliament in Stans in 1481, following a severe crisis of the Swiss confederation⁴⁸, was dictated to children to foster unity and to

⁴⁰ A. Clavien, *Grandeurs et misères de la presse politique*, Lausanne, Editions Antipodes, 2010, p. 81; J.-J. Langendorf, P. Streit, *Ein bedrohtes Land. Das Schweizer Volk und seine Armee während der beiden Weltkriege*, Gollion, Infolio, 2010, p. 86; P. Alemann, *Die Schweiz und die Verletzung der belgischen Neutralität im Weltkrieg*, Zürich, 1914, p. 58.

⁴¹ Dame, *Continuity and Change in Swiss Neutrality from 1815 to 1980*, cit., p. 163.

⁴² P. Alemann, *Die Schweiz und die Verletzung der belgischen Neutralität im Weltkrieg*, Zurich, 1914, pp. 35-38.

⁴³ See for more details: I. Brühwiler, *The Swiss Willensnation at Risk – Teachers in Divided Loyalties during the First World War* (forthcoming in *History of Education*).

⁴⁴ L.-S. Pidoux, *Les pouvoirs et les droits des citoyens*, «L'Éducateur», n. 34-35, 1910, pp. 525-257.

⁴⁵ A. Bataillard, *Notre armée*, *ibid.*, n. 40, 1912, pp. 598-599.

⁴⁶ P. Decker, *Les mœurs suisses*, *ibid.*, n. 3, 1912, p. 48.

⁴⁷ Niklaus von Flüe (1417-1487) was a farmer and later a hermit in Sachseln, Switzerland. He became famous as Brother Klaus, and his mediatory role – without his presence at the meeting – in the conflict of the Stanser Verkommnis in 1481 has been proven (E. Walder, H. Stirnimann, *Niklaus von Flüe*, *Historisches Lexikon der Schweiz*, Last modification: April 4, 2010, <<http://www.hls-dhs-dss.ch/textes/d/D10224.php>> (accessed: June 27, 2012).

⁴⁸ A. Grandjean, *Bon conseils*, «L'Éducateur», n. 21, 1914, p. 332.

explain that there had previously been crises in Switzerland but that they could be solved with good faith and neutrality. Texts before and after the outbreak of the war pleaded for unity with more or less similar arguments of a shared history, neutrality and similar ideals. However, after the outbreak of the war, the arguments were presented with more intensity and deeper emotions. The example Our Fatherland («Notre Patrie») distills the most popular elements:

Civics: Our Fatherland. Switzerland, our fatherland, isn't characterized by the unity of ethnicities or by unity of languages nor denominational affiliations. However, it is the country of our fathers, our country to which all – Swiss-French as well as Swiss-Germans – are strongly related; it's a common heritage with a high value. Switzerland is our fatherland; we love it all⁴⁹.

Throughout 1915, the articles concerning unity were different, but the content of the dictations, essays and civic lessons was always more or less the same⁵⁰. However, after 1915, interest in this subtopic decreased.

From the beginning of the 19th century, efforts were made to consolidate the Swiss youth on a national level through civic education and, with those efforts, to foster national feelings⁵¹. Teachers were given advice in the practical sections of the journals and subject material on *democracy, liberty, morals, self-government, the history of Switzerland, and specialties of the Swiss nation*. Most topics that were discussed in the *main* sections of the journals were represented in the practical sections and were taught in the classrooms, leading to the conclusion that those topics were considered important for educating future citizens. In both journals, *civics* was of primary importance. A didactic civics lesson in the «Schweizerische Lehrerzeitung» in 1918 begins as follows:

The task of civics is – considering contemporary opinions – to educate the youth to know the basics of our nation's life, to evoke in them high conscientiousness of their civic duties and a patriotic sense of responsibility⁵².

The text continues with instructions for fourth- to sixth-graders in the subject of natural history and the topic of game and hunting regulations⁵³.

⁴⁹ P. Magnin, *Notre Patrie, Civisme, ibid.*, n. 34-35, 1915, p. 505. Own translation.

⁵⁰ See, e.g., J. Magnin, *Pendant la guerre, ibid.*, n. 3, 1915, p. 42; Ch. Krieg, *Le 1^{er} août, ibid.*, n. 30-31, 1915, p. 473; J. Magnin, *Le 1^{er} août, ibid.*, n. 30-31, 1915, p. 473; P. Magnin, *La Patrie, ibid.*, n. 32-33, 1915, p. 489; E. Visinand, *Le civisme à l'école complémentaire, ibid.*, n. 51, 1915, pp. 751-752.

⁵¹ Crotti, *Schweizer sein – die Nationalisierung der Jugend. Politische Bildung im öffentlichen Bildungssystem*, cit. pp. 234-235; F. Osterwalder, *Akteure, Kontexte und Innovationen – soziale Funktion und Eigendynamik in der modernen Schulgeschichte. Schule als Agentur der „Nation“*, *ibid.*, pp. 15-37, 22.

⁵² H. Huber, *Praxis des staatsbürgerlichen Unterrichts auf der Stufe der Primar-, Sekundar- und Fortbildungsschule*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 5», n. 2, 1918, pp. 5-6. Own translation.

⁵³ *Ibid.*, pp. 5-6.

There are other texts in both teachers' journals with more or less the same instructions⁵⁴. Specifically, some texts highlight liberty or neutrality. Liberty is explained in relation to the four official languages of Switzerland; freedom of the press, assemblies, and trade⁵⁵; the history and heroic battles of the confederates⁵⁶; the beautiful Swiss scenery⁵⁷; and individual freedom⁵⁸. Neutrality is often explained in relation to Swiss history and its defense⁵⁹, but it gains timeliness in the face of the outbreak of the war. In September 1914, «L'Éducateur» published three dictations with the titles Violated neutrality («Neutralité violée»)⁶⁰, Recognized neutrality («Neutralité reconnue») and Respected neutrality («Neutralité respectée») under the main title Neutrality in Switzerland («Neutralité de la Suisse»). Thus, Swiss history from the 19th century was stressed. One article published in February 1915 distinguishes between the different neutralities of the countries of Luxembourg, Belgium and Switzerland based on the characteristics of their specific histories⁶¹.

Some lessons directly promoted patriotic emotions, the patriotic ideals of the 1910s, respect for Switzerland's institutions and the sense of social solidarity as promoted in other lessons⁶². Throughout the time period investigated, love for the fatherland was stressed:

Switzerland is my fatherland. It's here where I was born. Here are all of the people I love: my dear parents, my uncles and my aunts, my cousins. It's here where I find my school. It's here where I have all my colleagues, with whom I have fun every day. Switzerland is the most beautiful fatherland. I love it with all my heart, and if one day enemies came, I would defend it with bravery⁶³.

⁵⁴ See e.g.: E. Visinand, *Civisme*, «L'Éducateur», n. 49, 1915, p. 718.

⁵⁵ See, e.g., L.-S. Pidoux, *Le citoyen suisse et la liberté*, *ibid.*, n. 36-37, 1910, pp. 545-547; H. Huber, *Praxis des staatsbürgerlichen Unterrichts auf der Stufe der Primar-, Sekundar- und Fortbildungsschule*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 5», n. 2, 1918, pp. 6-10.

⁵⁶ See, e.g., A. Grandjean, *Liberté*, «L'Éducateur», n. 3, 1914, pp. 43-44; F. Meyer, *L'amour de la liberté*, *ibid.*, n. 5, 1911, pp. 77-80; H. Huber, *Praxis des staatsbürgerlichen Unterrichts auf der Stufe der Primar-, Sekundar- und Fortbildungsschule*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 16», n. 4, 1918, p. 14.

⁵⁷ See, e.g., F. Meyer, *L'amour de la liberté*, «L'Éducateur», n. 5, 1911, pp. 77-80.

⁵⁸ J. Magnin, *Le droit et le devoir*, *ibid.*, n. 2-13, 1917, p. 31; H. Huber, *Praxis des staatsbürgerlichen Unterrichts auf der Stufe der Primar-, Sekundar- und Fortbildungsschule*, «Beilage zur Schweizerischen Lehrerzeitung Nr. 45», n. 9-10, 1918, p. 26.

⁵⁹ See, e.g., P. Decker, *Le goût de l'histoire nationale*, «L'Éducateur», n. 16, 1912, pp. 253-254.

⁶⁰ A. Grandjean, *Neutralité violée, Neutralité reconnue, Neutralité respectée*, *ibid.*, n. 35-36, 1914, pp. 538-540.

⁶¹ G. Jaquerod, *Les neutralités*, *ibid.*, n. 9, 1915, pp. 143-144.

⁶² See, e.g., P. Decker, *Le goût de l'histoire nationale*, *ibid.*, n. 16, 1912, pp. 253-254.

⁶³ A. Regamey, *Mon pays*, *ibid.*, n. 21, 1916, p. 329. Own translation.

Some add the shared history⁶⁴, and others distinguish between the fatherland's love of women and men⁶⁵. In April 1915, a civics lesson was published with the title *A Good Citizen* («Un bon citoyen»), in which teachers state very precisely how they define a good Swiss citizen:

The school will make you a good citizen. My child, you start a new school year; for you, it will be the last one. When you finish school – supplied with all of the knowledge school has given you – you will leave for the city or the field for work. First, you will be an apprentice, and then a worker, and with that, you will become a useful member of our society. Later on, the fatherland will need you to defend it, and you will be asked to contribute to its expenses; but, by contrast, you will have the rights to participate in national life. Then, you will have – as a citizen of a free nation – grand tasks to fulfill and various rights to exercise. It's for these grand and noble tasks that school prepares you; school wants to make of you a skilled worker, a valuable man, a good citizen⁶⁶.

This speech was addressed to approximately 14-year-old boys. The text directly stresses, among other topics and in addition to indirect virtues and moral teaching, the institution of school as very important for the sake of the country and therefore for the education of future citizens.

1.3. *War's influence on pupils from teachers' perspectives*

At the beginning of 1917, «L'Éducateur» began an inquiry asking teachers what influence the war had on their pupils. Only three responses were received, two from canton Vaud and one from Jura Bernese, but the responses nevertheless demonstrate high diversity. One respondent from canton Vaud claims that he saw no differences in his pupils' attitudes following the war and mentions that they read more or less the same literature and still played *children's war games* in the same manner. He added, however, that charity played a much larger role than it did before WW1. The second respondent from canton Vaud stated that the war had no negative influence on his pupils, that they were interested in the current situation and that they had become more patriotic: «First and foremost, they have become Swiss»⁶⁷. He also added that the coming generation would be a generation of soldiers. He observed more intense charity in his class, with collections for children in warring countries. The teacher from Jura Bernese complained that the war had a negative influence on his pupils, with decreasing

⁶⁴ J. Magnin, *La Suisse est ma patrie, ibid.*, n. 29, 1915, p. 463.

⁶⁵ L.-A. Rochat, *La guerre et la patrie*, «L'Éducateur», n. 5, 1916, p. 77. Own translation.

⁶⁶ J. Magnin, *Un bon citoyen*, «L'Éducateur», n. 16, 1915, p. 255. Own translation.

⁶⁷ II. *Quelle influence la guerre a-t-elle exercée sur vos élèves ? Réponse 1-3, ibid.*, n. 15, 1917, p. 263.

discipline in class, and he reported the war circumstances and its effects in general as difficult, such as poor, starving children and having to replace teachers. However, he added that the “strong” boys were very interested in the war (e.g., in the areas of combat)⁶⁸. In general, the inquiry provided insight – despite the diverse answers – into citizens’ ideals regarding good morals, both positive and negative aspects of the current circumstances, and the high degree of continuity in the fundamental educational citizenship ideals and national identification.

In general, these results highlight a number of continuities in citizenship education despite the war circumstances in the 1910s. There is a strong interconnectedness between school and the military, but war is glorified less after 1915, when discussions of the negative aspects of war increase. *Peace* is largely described in lessons in the «Schweizerische Lehrerzeitung» and in the main sections of both journals. There, religious aspects arise as well as issues of liberty and neutrality. Lessons and articles about *unity* increased during the time of the highest danger, 1914-1915, and were similar in argumentation before and after the war. After the outbreak of the war, however, the arguments reflected more emotions and patriotic feelings. Throughout the time period investigated, Swiss institutions received high respect and appeared to be very important for education. With the war, a growing solidarity can be observed, and the number of texts and lessons about *war/peace* and *civics* increased immediately after the outbreak of the war. Thus, for the education of the future citizens, specific Swiss history was stressed and patriotic ideals such as liberty, freedom and neutrality remained important, as did the institutional interconnections between the army and school. To educate national citizens, *unity* was fostered. However, due to the war, the cultural ideal of war’s cleansing effects diminished, and in the classrooms, solidarity and charity were taught more often.

2. *Desires for peace – pupils’ essays in 1915*

During wartime, workers especially suffered from rising food prices, unemployment and the absence of social policy measures. Thus, social inequalities led to multiple demonstrations beginning in 1916 and culminating in November 1918 in a *general strike* («Landesstreik»), to which the Swiss army was called⁶⁹. Switzerland escaped military attacks during the entire war, but nevertheless the country longed for the end of the war. But the end

⁶⁸ *Ibid.*, pp. 263-264.

⁶⁹ M. Bürgi, *Erster Weltkrieg, Soziales*, Historisches Lexikon der Schweiz, Last modification: December 4, 2013, <<http://www.hls-dhs-dss.ch/textes/d/D8926.php>> (accessed: June 30, 2014).

was overshadowed by the abovementioned general strike and the Spanish influenza, which claimed nearly 24,000 lives in Switzerland in 1918, including approximately 1,500 soldiers⁷⁰.

In December 1915, the First World War had been raging across Europe for nearly one and a half years. The teacher candidates in the pedagogical section of Solothurn's cantonal school were asked to write an essay about the topic *Desires for Peace* («Friedenswünsche») in their final exams. This student group consisted of 7 females and 19 males who were approximately 19 or 20 years old⁷¹.

The sources were evaluated in a hermeneutic sense, which means that there was a tight interconnection between the question raised and the sources that followed a structure of openness⁷² but that was by no means boundless. The relationship included adaptations during the analyses and categorizations. Thus, history was systematically related to sense, actions and culture⁷³, and political, social and economic circumstances were of crucial importance. The categorization of the students' essays is depicted with a word cloud (see figures 2 and 3). The larger the font of the term written, the more pupils mentioned that subtopic in their essays. The calculated proportions are exactly the same as in common bar charts, but word clouds create less of an impression of rigorous accuracy.

In all 26 essays, the desire for peace and the horrors of war were described in the context of power and the misery of refugees (see figure 2)⁷⁴. Depictions

⁷⁰ M. Huber, *Geschichte der politischen Presse im Kanton Luzern 1914-1945*, Luzern, Rex, 1989, p. 116; J.-J. Langendorf, P. Streit, *Ein bedrohtes Land. Das Schweizer Volk und seine Armee während der beiden Weltkriege*, Gollion, Infolio, 2010, pp. 115-20; Ch. Sonderegger, *Grippe*, HLS, Last modified: February, n. 13, 2007, <<http://www.hls-dhs-dss.ch/textes/d/D22714.Php>> (accessed: June 17, 2014).

⁷¹ In some students' essay books, their dates of birth were mentioned and, in the final table in the minutes of the examination board, their ages when they wrote the final exams were recorded (in Staatsarchiv Solothurn, from now on cited as: StASO, Lehrerseminar Solothurn/Pädagogischen Hochschule Solothurn, Akzession 2009/19, 11.3 Patentprüfungskommission: Protokolle, 1912-1936, 1915, 1916; *Ibid.* 13.1 Patentprüfungen 1858-2005, 1915).

⁷² H.-G. Gadamer, *Gesammelte Werke Bd.1: Hermeneutik I: Wahrheit und Methode: Grundzüge einer philosophischen Hermeneutik*, Tübingen, J.C.B. Mohr, 1960, p. 344.

⁷³ F. Jaeger, *Was ist eine historische Kulturwissenschaft?*, in I. Därmann, Ch. Jamme (edd.), *Kulturwissenschaften. Konzepte, Theorien, Autoren*, München, Wilhelm Fink, 2007, pp. 143-167, p. 146.

⁷⁴ In this word cloud are 17 main categories with a total of 332 mentions: 43 in the category *disadvantages of war* (with the subcategories horrors of war, power, the misery of refugees), 21 in *sufferings of all*, 16 in *destroys ideal images*, 52 in *economic problems* (individual and national), 19 in *cultural problems* (destruction of cultural assets, abuse of sciences for war), 12 in *duration*, 6 in *medical consequences*, 16 in *government*, 10 in *after-war results*, 46 in *social difficulties* (individual trauma, the deaths of relatives), 11 in *soldiers* (circumstances, relation to enemy), 24 in *nation/people* (relations with other nations, sovereignty, exploitation), 4 in *ecstasy of war*, 14 in *Switzerland* (mobilization, border watch), 2 in *nature of human beings*, 18 in *religious views* (meaning of life, prayers, pontifical interventions), 18 in *positive views* (increasing solidarity, cleansing effects, literature/art, peace gets a higher value). The more mentions a category received,



Fig. 2. Sub-topics related to 'war' in pupils' essays, 1915.

of people suffering followed in most essays, and some of them mentioned that neutral countries suffer the most, including Switzerland. In nearly all of the essays⁷⁵, economic problems⁷⁶ were specified multiple times, but nearly as important were social problems, which were declared individual social problems because of unemployment, rising food prices, the deaths of relatives and trauma.

the larger the print of the term. For example, the category *economic problems* had 52 mentions; thus, it is printed 26 times larger than the category *nature of human beings*, which had only 2 mentions.

⁷⁵ It is possible that one category was mentioned more than 26 times because it was possible to choose the same category multiple times for the same essay. For instance, if a student wrote about economic problems and described the country's financial problems, individual disadvantages, and problems related to a dependence on raw materials from abroad, then each subcategory received a count, which resulted in a count of three for the category *economic problems*.

⁷⁶ In the category *economic problems*, there were 52 mentions: 19 in the subcategory *economy of the nation*, 19 in *individual economic problems*, 8 in *different branches of economy* such as tourism, industry, and trade, and 6 in the subcategory *dependence on foreign countries*.

Nevertheless, nearly half of the essays (12 essays with 18 mentions) discussed positive aspects of the war; however, all emphasized that the positive aspects never outweighed the negative effects of war. In the eyes of the pupils, the positive aspects were that solidarity among the people had increased and class distinctions had diminished. War was discussed as a remedy against effeminacy that had cleansing effects. Furthermore, the essays mentioned that the arts and literature had glorified war and needed to be rethought and that after the war, peace would be more highly valued. *Religious views* were mentioned in more than half of all essays, in subtopics such as prayers, pontifical interventions for peace, the meaning of life and the danger of losing faith⁷⁷.

One girl expressed the situation about war and peace as follows:

People stand against other people. Each one believes he is the bearer of the highest developed culture. Sciences and enlightenment progress each year. Schools get better. There are improvements concerning mental development. However, there is something that gets forgotten: because of people's firm insistence on their own nationalities, they forget that they are all a community of brothers. Thus, hate is regenerated again, and there is war again⁷⁸.

The girl discusses war in terms of cultural struggles and declares nationality to be a problem. She continues in her text that class distinctions, nationality and feelings of the heart need to disappear, and goodwill must count. She appeals to leaders to advocate for peace and concludes:

The will of the people doesn't seem to be considered, at least not as it should be. Otherwise, the storm that was coming up a year ago would have taken a different end⁷⁹.

This girl was not the only one to write about citizens, nation and the fatherland; others were as concerned as she was. In total, nearly half of all essays mentioned *nation or people*⁸⁰. In those essays, the students praised the fatherland, but some of them stated that «to give one's life to the fatherland – to serve it – those were the feelings of the first ecstasy of war»⁸¹ or that «people get innocently involved in the war»⁸². Moreover, the argument was stressed that men fight in wars only for their leaders, and some students added that there were many who did not even know what they were fighting for. Two students

⁷⁷ In the category *religious views*, there were 18 mentions: 10 in the subcategory *prayers*, 4 in *interventions of the Pope*, and 2 in the danger of *losing faith* and asking *meaning of life*.

⁷⁸ StASO, Lehrerseminar Solothurn/Pädagogischen Hochschule Solothurn, Akzession 2009/19, 13.1 Patentprüfungen 1858-2005, 1915, Marie G. Own translation.

⁷⁹ *Ibid.*, Marie G. Own translation.

⁸⁰ In the category *nation/people*, 12 essays were involved, with a total 24 mentions: 6 in the subcategory *friends/enemies*, 4 in *nationality/fatherland*, 5 in *cultural struggles*, 2 in *will of the people*, 4 in *people are innocent* and 3 in *people being exploited*.

⁸¹ StASO, cit. Patentprüfungen, 1915, Anny W. Own translation.

⁸² *Ibid.*, Emil J.

complained that the war was not being fought for ideals but for economic reasons. Franz B. wrote,

War is operated as a business. There's much haggling going on in the battle between countries, and the most advantageous offer will be complied with. People don't go into battle because of ideals; it's only because of economic reasons. [...] Courage and bravery aren't crucial; it's the quality of the war machines, the organization⁸³.

Patriotism and nationality are reflected in thoughts about citizenship, keeping in mind that Switzerland struggled with major internal political conflicts between the two main cultures, the Swiss-French and the Swiss-German, and the teachers' journals pleaded for national unity. It is surprising that none of the students mentioned the *fossé moral* or had concerns about the danger of losing national unity. Considering that the students frequently mentioned newspapers as information platforms and were informed about the internal political fights by the daily newspapers, it can be concluded that they had no doubts about national cohesion or that the other problems caused by the war were more severe in their eyes.

Three-quarters of the pupils wrote that the longer the war lasted, the greater the desire for peace (see figure 3)⁸⁴. They described peace in a religious regard (praying to God to bring peace) or wrote that peace had to be individual and Christian⁸⁵. Active demands for peace were made by four students; they asked that both the warring and the neutral countries and the socialist party promote peace⁸⁶. A very prominent⁸⁷ argument was that peace is needed for a civic society to function. One of the pupils explained this argument by saying: «Citizens are happy when there is order»⁸⁸. Another stated: «Blessed work can begin again»⁸⁹. In general, dreams for peace were related to religious and civic lives, including industrious individuals. However, some students added the improved welfare of nations⁹⁰ after wartime and the welfare of countries⁹¹ that were not involved

⁸³ *Ibid.*, Franz B. Own translation.

⁸⁴ This word cloud contains 16 main categories, with a total of 133 mentions: 26 in the category *longing for peace*, 11 in *ideals*, 18 in *increasing desire for peace*, 3 in *long period till achieved*, 9 in *long-term peace*, 3 in *preserve peace in Switzerland*, 12 in *for peaceful civilian work*, 6 in *outlook after the war*, 15 in *religious views*, 5 in *actively promoted*, 11 in *collective peace*, 3 in *natural phenomenon*, 1 in *longing for freedom*, 4 in *limited desire for peace*, 5 in *convergence of different nations*, and 1 in *women ask for peace*.

⁸⁵ Ten essays discussed the category religious views with a total of 15 mentions, 10 in the subcategory religious regard and 5 in Christian individual virtues.

⁸⁶ In total, there were 5 mentions in 4 essays: 2 in the subcategory neutral countries, 2 in warring countries and 1 in the socialist party.

⁸⁷ In total, there were 12 mentions in the category *peaceful civilian work* in 11 essays, 11 in the subcategory *work in civic society* and 1 in the subcategory *virtues diligence and endurance*.

⁸⁸ StASO, cit., Patentprüfungen, 1915, Walter I. Own translation.

⁸⁹ *Ibid.*, Max Z. Own translation.

⁹⁰ The category *outlook after the war* had 6 mentions in 6 essays.

⁹¹ StASO, cit. Patentprüfungen 1858-2005, 1915, Emil J.



Fig. 3. Sub-topics related to 'peace' in pupils' essays, 1915.

in the war. Another argument extended beyond nationality; five students considered international peace, humanity among nations, the welfare of all nations and international cooperation⁹². Despite the appeal of these students to international humanity, it must be noted that nationalism and patriotism were of crucial importance in the 1910s and that even when pupils wrote about Europe as a whole, citizens were regarded at the national level. Moreover, both Swiss teachers' journals suggest increasing efforts to foster national unity, among other reasons because of the severe internal political conflicts.

In summary, the students wrote that people should be proud of their own nation but that this was difficult when war and hate arose; therefore, national thoughts should be changed to promote welfare for all. Class distinctions were stressed as another problem area, but some noted their decrease due to war circumstances and the increase in solidarity. Furthermore, the common people were seen to be innocent regarding war causes, and citizens were mostly described as religious members of society who loved their work and public order.

⁹² In total, the category *convergence of different nations* had 5 mentions in 5 essays.

Conclusions

Schools and war are intertwined because both are parts of societies. Dominant ideologies can be reproduced by educational institutions, but at the same time, marginalization can be empowered⁹³. Thus, the findings of the consulted sources reveal high complexity with partly divergent aspects reflecting a wide, distinct range of citizenship education. Specifically, the Swiss teachers' journals immediately reacted to the outbreak of the war and provided teachers with lessons and didactic advice regarding the current events and *peace/war* and/or *civics* in general. In the first texts after the outbreak of the war, a kind of war enthusiasm can be identified; later, the negative effects of war were taught more often in the classrooms, and the glorification diminished. The rapturous behavior and initial war enthusiasm were not limited to classrooms and teachers but were observed by major parts of the society and were based on the desire for the «new human being» that was promised by contemporary scientific educationalists⁹⁴. Throughout wartime, children were described in dictations and essays as imitating war. The aim of educating children about virtues and morals did not change during the time investigated, but the students' essays highlighted a kind of disillusion attributable to the aftermath of war as well as concerns that war ideals had become «economized». Moreover, the students' essays stressed cultural destruction but had their counterpart in the teachers' journals, which fostered civics, especially virtues and morals in general in school. Moreover, the essays highlight a change in the Swiss-German belief in the cultural superman that was fabricated by German educationalists.

Patriotic ideals and love of the fatherland were described with diligence with regard to diverse subjects in both the teachers' journals and the essays of the juveniles. However, some texts stressed the idea of European citizenship or that people should overcome nationalist ideas. The literature discusses European spirits in Switzerland from 1914 on with primarily pacifistic ideas, but some of these feelings were neutralized due to the war, for example, the International Peace Bureau⁹⁵. Nevertheless, the findings reveal thoughts about the dangers of nationalism and highlight international movements for peace. However, it must be noted that most lessons and didactic advice fostered citizenship education on a national rather than an international level. Thus, Swiss nationality must be viewed through a threefold lens, at the communal, cantonal and national levels. However, the cantons (sovereign member states within the federal state) are responsible for public education, which leads to the question of how a canton-supported public education can produce a version of

⁹³ Blair *et al.*, *Editor's Introduction*, cit., p. 2.

⁹⁴ R. Horlacher, *Bildung*, Bern, Haupt, 2011, p. 68.

⁹⁵ J. Lubor, *L'esprit européen en Suisse de 1860 à 1940*, Lausanne, Cahiers d'histoire contemporaine, 1990, p. IX.

national unity in a multilingual and multicultural country that is only united by its free will⁹⁶. «In answering this question, perhaps the most crucial point about separate subcultures is precisely their separateness»⁹⁷. Other authors highlight Switzerland's federal system, which facilitates the coexistence of the different cantons and the autonomy of the communities in mixed cantons⁹⁸. Others stress the Swiss nation as the construction of a voluntary and natural community⁹⁹. However, national unity was fostered in schools at the time of the greatest danger, and teachers felt that they had been called upon to educate their pupils to be national citizens rather than members of a language group. No students mentioned the internal political conflict in their essays, and none scrutinized national unity.

All evidence suggests high support for and acceptance of the army throughout the time period investigated. Furthermore, the interconnection between the army and schools was rarely ever questioned. In some literature, the army is called the most national of all institutions¹⁰⁰. Other works state that in a republican nation, national defense is based on civilian institutions, and no special military education is needed because of the high identification of the entire population with the army, even when they are not army members¹⁰¹. Some describe broad approval for the army in the vote of 1906 but see a change attributable to the First World War¹⁰². The latter were not observed within the sources investigated or in the everyday school lessons, but there was more criticism of war in general and the aftermath of war. Additionally, it must be noted that in public, foremost right-wing conservative groups exaggerated the myth of the institution of the army, whereas pacifists supported peace policies¹⁰³.

⁹⁶ The lack of a common language and religion was the origin of the term *Willensnation*, which means a nation united by free will. For more information about threefold citizenship or *Willensnation*, see E. Renan, *Qu'est-ce qu'une nation?*, Paris, 1882 or O. Zimmer, *Boundary mechanisms and symbolic resources: towards a process-oriented approach to national identity*, «Nations and Nationalism», n. 9, 2003, pp. 173-193.

⁹⁷ Dame, *Continuity and Change in Swiss Neutrality from 1815 to 1980*, cit., p. 69.

⁹⁸ M. Huber, *La Conception Suisse de l'Etat*, Zurich, Rascher, 1916, p. 26.

⁹⁹ Zimmer, *Boundary mechanisms and symbolic resources: towards a process-oriented approach to national identity*, cit., p. 114-115.

¹⁰⁰ G. Wagnière, *La Suisse et la Grande Guerre. Notes et souvenirs*, Lausanne, Payot, 1938, p. 64.

¹⁰¹ R. Jaun, *Preussen vor Augen. Das schweizerische Offizierskorps im militärischen und gesellschaftlichen Wandel des Fin de siècle*, Zürich, Chronos, 1999, pp. 211-214.

¹⁰² Langendorf, Streit, *Ein bedrohtes Land. Das Schweizer Volk und seine Armee während der beiden Weltkriege*, cit., pp. 114-115.

¹⁰³ Daniel V. Moser-Léhot, *Zwischen Pazifismus und Patriotismus – Politische Bildung als Diskussionsthema im „Educatour“ und an den Kongressen der Société Pédagogique de la Suisse Romande 1914 bis 1942*, in A. Hoffmann-Ocon, P. Metz (edd.), *Schuljugend unter nationalem Anspruch. Bildungshistorische Untersuchungen zur schulpädagogischen Publizistik und zu visuellen Medien in der Schweiz und in Deutschland in der ersten Hälfte des 20. Jahrhunderts*, Baltmannsweiler, Schneider, 2010, pp. 109-149, 144.

Very often, neutrality was taught in connection with military defense, liberty and Switzerland's own specific history. It was also taught that Switzerland had to be ready to defend itself. Some lessons stressed that Switzerland, as a neutral country, had to promote peaceful solutions to end the war and to mitigate its aftermath. The appeal to solidarity and charity underlined the efforts of both teachers' journals to unify the nation, to support official institutions such as the army and schools and to educate pupils to become national citizens. The pupils often described citizens as religious members of society who were diligent and hardworking. Although both journals emphasized virtues, there was no direct religious instruction concerning citizenship. However, peace lessons were often related to Christianity.

War challenged citizenship education in Switzerland; thus, moral and virtue education were fostered as well as patriotic sentiments. The use of language can be seen in Daniel Tröhler's «Languages of Education», in which the adaptability of the language in education, written for the purpose of morals and nationalistic reasons, depends on «how strongly its ideological content is connected to images of timelessness or historicity»¹⁰⁴. Thus, the language of education in the 1910s was challenged by the war circumstances but did not change fundamentally. Teachers still promoted the same values in their journals and in the classrooms, but the Swiss-German teacher students questioned the German cultural dominance and the image of the future Swiss citizen. Thus, citizenship education in the 1910s in Switzerland was multifaceted, but it stressed the importance of school, especially in times of war.

¹⁰⁴ D. Tröhler, *Languages of Education Protestant Legacies, National Identities, and Global Aspirations*, New York, Routledge, 2011, p. 174.

The construction of *Heimat* on German wallcharts in the early 20th century, and the part it played in creating a national identity

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ABSTRACT: This article explores the pedagogical and political application of the term *Heimat* in the early part of the twentieth century, looking at both the connection between *Heimat*, fatherland and nation as well as local history studies in schools. Various aspects of the *Heimat* construction and the manner in which connections to *Heimat* were formed will be brought out through the analysis of selected school wallcharts.

EET-TEE KEYWORDS: Wall Map; Primary Education; History; Teaching; National Identity; Germany; XX Century.

Introduction

Alongside its allusions to the religious metaphor of the 'heavenly resting place', to the ownership of a house and estate, the right to certain social welfare provisions conveyed by residence in a particular location («historisches Heimatrecht»)¹, the German term *Heimat* encompasses a richness of meaning that largely evolved during the nineteenth century. At this time, *Heimat* became

¹ See H. Bausinger, *Heimat in einer offenen Gesellschaft. Begriffsgeschichte als Problemgeschichte*, in W. Cremer, A. Klein (edd.), *Heimat, Analysen, Themen, Perspektiven*, 2 Bde., Bielefeld-Bonn: Westfalen-Verlag und Bundeszentrale für politische Bildung (Schriftenreihe der Bundeszentrale für politische Bildung Band 294 I/II), B. 294/I, p. 77.

a highly-charged term used in highlighting contrast². The term was linked more closely with hope and longing than with an actual place, and more closely with the struggle against alienation than with a particular location. It nevertheless, through sheer functional logic became associated with feelings of belonging which were spatially bound, at the same time conveying a mixture of identity-related emotions beyond such spatial associations.

Around the turn of the 19th and 20th centuries, this definition of the *Heimat* concept became a component of a targeted campaign of 'identity politics'. In schools, the driving forces behind identity education came into operation, serving to foster a sense of community and create a space within whose boundaries it was intended that each person's individual self would become one with *Heimat*. *Heimat* was carefully constructed, with the aim of bringing permanence to a way of life, and creating a national – actively inhabited – memory³ which guided and upheld special attributes. Educational wallcharts fulfilled that purpose. Created from the standpoint of didactic methodology, enriched with educational intentions and embedded in political aims, they were not merely learning and teaching materials, but a vehicle for the collective national self-image of the time. Through the wallcharts and their conception of *Heimat* as a utopia of the self-image of the population, a shared space was visualised and, thus, made it possible to shape ideas.

In this way, national identity and *Heimat* became a «cultural product»⁴ which was given a tangible presence in classrooms. Educational wallcharts took on the function of forming identity via their symbolic messages and lent the metaphorical meaning of the term *Heimat* a clear visual incarnation. In the world of the educational wallchart, *Heimat* is no place 'where anything is possible', but an attitude associated with concrete intentions, a mindset that collectively channels the subjective feeling of *Heimat*-based security: In this way, individuals' love of their localised *Heimat* benefits the wider fatherland⁵. The overall objective served by the wallcharts was to transform each discrete sense of *Heimat* into a national one. In the following, these objectives will be explored, starting with a look at how a symbiosis of the concepts of *Heimat* and fatherland was striven for, moving on to an explanation of the methods used by schools to home in on the term *Heimat*, and concluding with observations about the portrayal of *Heimat* in German wallcharts.

² H. Bausinger, *Typisch Deutsch*, München, Beck, 2000, p. 72. Discussions about the apparent untranslatability of the German term *Heimat* owe their existence to historical tradition and interpretation; Bausinger refers, in particular, to «romantic millstones». See also B. Schlink, *Heimat als Utopie*, Frankfurt am Main, Suhrkam, 2000, p. 27.

³ See M. Halbwachs, *Das kollektive Gedächtnis*, Stuttgart, Enke, 1967.

⁴ B. Anderson, *Die Erfindung der Nation. Zur Karriere eines erfolgreichen Konzepts*, Frankfurt am Main, Campus-Verl., 2005, p. 14.

⁵ See A. Richter, *Die Heimat im Geschichtsunterrichte*, «Deutsche Blätter für erziehenden Unterricht», n. 16, 1889, p. 57.

1. «Heimat», *Love, Fatherland – a sought-after symbiosis*

In 1909, Tecklenburg emphatically insisted:

Mögen Behörden und Fachmänner, Vereine und Laien, ja, möge das ganze deutsche Volk wach werden und beitragen, daß die Heimat als Grundlage unserer Gedankenwelt, als Grundlage des Staates, als Quell und Wurzel aller echten vaterländischen Gesinnung, als unentbehrlichster Bestandteil in der Erziehung unserer Jugend immer mehr gewürdigt und immer mehr in ihre natürlichen Rechte eingesetzt werde!⁶

It was intended that the idea of *Heimat* would gain general currency, notwithstanding the fact that this wake-up call came at a time when the concept of *Heimat* had long been present in politics, education, art and literature. It nevertheless grew to be a potent concept over the following years, becoming the basis of intellectual thought and serving to legitimise conservatism and nationalism. A person's bond to their 'home soil' (*Heimatscholle*) was both their right and their responsibility⁷. *Heimat* was elected as the inexhaustible source that provided for all areas of activity and everyday needs⁸, since it was through *Heimat* alone that a love of the fatherland could mature⁹ – it was the vital basis of patriotism¹⁰. The concept of *Heimat* extended its reach from the domestic sphere into the larger political arena. Allegiance was sworn to the ubiquity and omnipotence of the *Heimat* principle, whose implementation was becoming increasingly necessary against a backdrop where traditional ways of life were becoming eroded¹¹, as well as in the light of radical political changes.

The literary and artistic products arising from the *Heimat* art movement augmented political demands to tighten the bonds that hold country, people and history together¹². *Heimat* became a means of identity formation, which created a sense of Heimat ownership in order to cultivate a basic sense of obligation in the German population. The political use of the *Heimat* concept via its equation with patriotism began to take root at this point.

⁶ A. Tecklenburg, *Schule und Heimat. Wegweiser zur Umgestaltung des Unterrichts von der Heimat aus. Unter besonderer Berücksichtigung des Geschichtsunterrichts*, Hannover-List, Meyer, 1909, p. 53.

⁷ See for example H. Stieglitz, *Der Lehrer auf der Heimatscholle*, München, Berlin, R. Oldenbourg, 1913.

⁸ See Steinbrück, *Über Heimat und Heimatkunde*, «Schulwart», n. 15/16, 1919, p. 113.

⁹ See A. Mollberg, *Heimat und Charakterbildung* («Schaffende Arbeit und Kunst in der Schule», 57), Leipzig, A. Haase, 1916, p. 7.

¹⁰ See H. Winzer, *Die Bedeutung der Heimat*, «Deutsche Blätter zur erziehenden Unterricht», n. 27, 1900, p. 4.

¹¹ Cf. W. Cremer, A. Klein, *Heimat in der Moderne*, in Cremer, Klein (edd.), *Heimat, Analysen, Themen, Perspektiven*, cit., Bd. 294/II, p. 37.

¹² See B. Clemenz, *Heimatkunde*, in E.M. Roloff (ed.), *Lexikon der Pädagogik*, 5 vols., Freiburg i. Br., Herder, 1921, Vol. II, col. 692.

The borders of *Heimat* were those of the German fatherland. It is hardly surprising, therefore, that engendering in people a love of *Heimat* and the fatherland became an educational task: «mit [...] Liebe und Hingabe, wollen wir unsere Schüler durch die geliebten Fluren, durch den Wonnegau der Heimat führen»¹³. Since the well-being of the fatherland was closely bound to the idea of *Heimat*, the latter could not be entrusted to the care of arbitrary forces, particularly given its role in educating people – or even bringing about the birth of the «neue deutsche Mensch»¹⁴. This, then, saw the advent of a methodological, didactic principle in all schools, and especially in the study of local history.

2. Teaching and local history. «Heimat» as a principle

With his book *Instructions for the Teaching of Local History*, published in 1844, Friedrich August Finger provided an essential grounding in the educational establishment of the *Heimat* principle. In the period that followed, the study of local history gradually broke away from its propaedeutic function, initially having been concerned with geography, and acquired individual status in respect of learning and teaching in schools. In addition to this, demands for the subject of *Heimat* to be covered by all year groups at school increased. It was claimed that teaching of the concept could not merely be restricted to children in the lower years. Only by increasing the scope of local history studies would the subject realise its genuine purpose: to be a place of nurture for patriotism¹⁵. Gradually a social dimension emerged, along with a side of local history that was concerned with traditional folk culture¹⁶, and eventually the subject had formed the basis of an education system for the whole population, crucially, before the First World War. «Hier in der Heimat sind die starken Wurzeln unserer Kraft. Hier sammelt das Kind seine ersten Anschauungen. Hier geht ihm das Licht des Verstandes auf. Hier scheint ihm die Sonne der Mutterliebe»¹⁷.

¹³ H. Kerp, *Führer bei dem Unterricht in der Heimatkunde. Nach begründender Methode und mit vorwiegender Betrachtung des Kulturbildes der Heimat*, Breslau, Ferdinand Hirt, 1910, p. 17. See also K. Hossann, *Die Heimatidee im Unterricht der Volksschule*, Straßburg, Friedrich Bull, 1910, p. 12.

¹⁴ F. Bauer, *Und noch einmal Heimat*, «Neue Bahnen», n. 35, 1924, p. 139.

¹⁵ See R. Felgner, *Heimatkunde als Mittelpunkt des gesamten Unterrichts im dritten Schuljahre*, Dresden, Alwin Huhle, 1903, p. IV.

¹⁶ Cf. H. Fiege, *Die Heimatkunde, Weinheim*, Basel, Beltz, 1994, p. 13 (Introduction).

¹⁷ Steinbrück, *Über Heimat und Heimatkunde*, cit., p. 113.

Heimat became a leading principle; to be specific, reference was made to a «*Heimat* principle»¹⁸, whose implementation in the various school subjects was promoted as being universally enriching. Indeed, it was intended that the principle of *Heimat* would cut through every aspect of school life¹⁹. *Heimat*'s potential lay in its «natural conditions»²⁰. From this point on, it was possible to expand the subject area in all directions. Through the implementation of a didactic theorem that relied on concentration first on the familiar, before dealing with the exotic, the domestic sphere became a legitimate starting point for educational learning processes. «Besonders bei der Einführung des Kindes in die Welt des Abstrakten und Begrifflichen bedürfen wir der vielseitigen Anschauung der Heimat»²¹. It was intended that a child would develop a sense of *Heimat* in its domestic life, before its realm of experience was opened up to the world²². The subjects of natural history, geography and history, along with primary education and art e.g., all drew inspiration from the rich source of *Heimat* in delivering the ideas, which were required partly to be able to hold together an increasingly complex world within the parameters of *Heimat*'s familiarity. In the context of formal education, pedagogical aspirations centred on the wholesale formation of personality. It was hoped that positive effects could be achieved by schooling pupils' abilities in terms of understanding, feelings and will:

Erkennen, Fühlen, Wollen – jede Seite unseres Seelenlebens erhält ihr Gepräge von der Heimat aus. Auf dem Boden der Heimat, beeinflusst von der umgebenden Natur- und Menschenwelt bildet sich der Grundzug des Charakters. Die Heimat ist die Grundlage des Geisteslebens und der kraftvoll sich entwickelnden Persönlichkeit²³.

In the 1921 *Lexicon of Pedagogy*, the definitive specialist dictionary of the time, Clemenz explained: «Die schulische Auffassung der Heimatkunde ist heute [...] zu einer wichtigen, das gesamte Unterrichtsgebiet bestimmenden und durchziehenden Norm geworden»²⁴. The collective intellectual acquisition and ownership of an emotionally and subjectively important sphere was being striven for. At the same time, there was immense glorification of the *Heimat* principle. Practically omnipotent, it purified the soul, opened one's eyes, and

¹⁸ See for example R. Dobenecker, *Über den pädagogischen Grundsatz: "Heimatkunde nicht bloss Disziplin sondern Prinzip"*, (Friedrich Mann's Pädagogisches Magazin, 293), Langensalza, Hermann Beyer & Söhne, 1920.

¹⁹ See Tecklenburg, *Schule und Heimat*, cit., p. 10.

²⁰ Kerp, *Führer bei dem Unterricht in der Heimatkunde*, cit., p. 11.

²¹ F. Weitkamp, *Heimat und Unterricht*, «Neue Bahnen», n. 25, 1913/14, p. 116.

²² See L. Heinemann, *L. Heinemanns Handbuch für den Anschauungsunterricht und die Heimatkunde. Mit Berücksichtigung der verbreiteten Anschauungsbilder*, Leipzig, S. Hirzel, 1913, p. 25.

²³ Tecklenburg, *Schule und Heimat*, cit., p. 65.

²⁴ Clemenz, *Heimatkunde*, cit., col. 692.

facilitated aesthetic sensibilities. As a result, «Haus, Familie, Schule, Straße, Pflanzen, Tiere, Steine, Sonne, Mond und Sterne, überhaupt alles, was man [...] zu betrachten hat, soll heimatlich gestimmt sein»²⁵. Art and *Heimat* were invoked as the remedy of the people. Teachers extended their sphere of influence, from that point on acting as a pivotal link to *Heimat* organisations²⁶ and having to become *Heimat* experts²⁷.

The establishment of the *Heimat* principle in schools was promoted and given a legal safeguard by means of pioneering regulation. As early as 1872, it was laid down in the general directives (*Allgemeinen Bestimmungen*) that the teaching of geography should commence with local history. In addition, on 31 January 1908 Prussian ministerial directions declared: «Die Heimatkunde ist überall sorgfältig zu pflegen. Dies gilt nicht nur vom erdkundlichen Unterricht; auch die heimatlichen Geschichten, heimatlichen Sagen, Denkmäler, Bauten u.a. sind zu berücksichtigen [...]»²⁸. Furthermore, after the First World War, in the 1921 Guidelines for the Creation of Primary School Lesson Plans (*Richtlinien zur Aufstellung von Lehrplänen für die Grundschule*) issued by the Prussian culture minister, Hänisch, a demand was emphatically recorded that all teaching should carefully attend to the children's relationship with their *Heimat*-related surroundings and that a connection should be formed between this and the knowledge that they had prior to starting school²⁹.

These guidelines had an affirmative effect in expanding the production of wallcharts, which had already experienced a distinct boost as a result of the Reich's schools conference in 1920. At a time when the entire content of lessons was to be established on the foundations of *Heimat*, when the educational doctrine was one of *Heimat*, and when the institution of the school had become a nationalistic one³⁰, there was a need for suitable teaching materials which could satisfy the all-encompassing desire for *Heimat*. Accordingly, there was a resounding cry that: «Die Beschaffung von Heimatbildern in jeder Form (Schmuck- und Anschauungsbild, Modell, Lichtbild, Film u. dergl.) soll nach Kräften gefördert werden. Die künftigen Lehr- und Lernbücher sind heimatlich zu gestalten»³¹.

²⁵ *Ibid.*, col. 693.

²⁶ Cf. V. Schmitt-Roschmann, *Heimat. Neuentdeckung eines verpönten Gefühls*, Gütersloh, Gütersloher Verlagshaus, 2010, p. 69.

²⁷ Bauer, *Und noch einmal Heimat*, cit., p. 102.

²⁸ Quoted in Clemenz, *Heimatkunde*, cit., col. 698.

²⁹ *Richtlinien zur Aufstellung von Lehrplänen für die Grundschule* (1921), in W. Scheibe, *Zur Geschichte der Volksschule* (Klinkhardts pädagogische Quellentexte), 2 vols., Bad Heilbrunn, Klinkhardt, 1974, vol. II, p. 60.

³⁰ See for example J.F. Pöschl, *Der heimatkundliche Sachunterricht (Anschauungsunterricht auf der Unterstufe der Volksschule)* («Schaffende Arbeit und Kunst in der Schule», 14), Prag, A. Haase, 1913, p. 1.

³¹ *Die Zusammenfassung der Einzelgedanken auf der Reichsschulkonferenz*, in Fiege, *Die Heimatkunde*, cit., p. 57.

3. «Heimat» Images

Although critical voices preferred a more experiential learning method to pictorial depictions, by the end of the 19th century the wallchart had taken up a central position amongst available teaching materials and found legitimacy as an educational medium, primarily as a result of its ability to deliver didactically-prepared ideas about diverse content and themes, to facilitate the formation of clear concepts and oral contributions, to promote a particular aesthetic taste and evoke desired emotions. At the start of the 20th century, production of the pictures increased; educational wallcharts became a pivotal part of lessons. Pictorial series, often with dozens of individual pictures, were produced for all school subjects; even for local history studies well-known publishers, such as C. C. Meinhold & Sons of Dresden, brought out wallcharts³². Of the use of images in lessons, Kerp explained:

Die Auswahl der Bilder ließe sich so treffen, daß wir durch dieselben die Naturschönheiten und Merkwürdigkeiten der Heimatprovinz vorführen und zugleich daran die wichtigsten Begriffe vermitteln könnten. Sie dienten dann einem doppelten Zweck, einmal zur *Belebung* des Unterrichts, zweitens zur *Klarstellung der Begriffe*, für welche die Naturanschauung fehlt³³.

3.1. *Artistic Decoration for Schoolroom Walls – «Heimat» in art*

The production of didactic wallcharts was complemented by a wide selection of artistic wallcharts, which were intended to serve as a suitably aesthetic decoration in school. In this respect, it was mainly lithography from the publishing houses of B.G. Teubner and R. Voigtländer in Leipzig that provided schools with a piece of genuine *Heimat* art³⁴ from a contemporaneous point of view.

Das ist gewiß ein sehr wichtiges Moment der Heimatkunde und der nationalen Erziehung, wenn wir unsern Schülern nicht nur in der freien Natur, sondern auch im Bilde zeigen, wie herrlich unser Land ist und wie diese Schönheiten der Künstler sieht und darstellt. [...] Deswegen ist sehr zu empfehlen, künstlerische Darstellungen der Heimat zu sammeln und zum Schmuck des Schulhauses und im Unterrichte recht oft zu verwenden. Dadurch kann gewiß auch echte Liebe zur Heimat dem Kinde in früher Jugend ins Herz gegossen werden, und was zu dieser Zeit im Gemüte verankert wurde, hält ja fürs ganze Leben fest³⁵.

³² The publisher's list comprised a wide selection. See for example *Schulwart-Katalog. Ein illustriertes Verzeichnis der besten Lehr- und Lernmittel*, Leipzig, 1911.

³³ Kerp, *Führer bei dem Unterricht in der Heimatkunde*, cit., p. 35.

³⁴ See *Künstlerische Steinzeichnungen als Wandschmuck für Schule und Haus*, «Pädagogische Studien», n. 23, 1902, p. 194.

³⁵ A. Herget, *Das Betrachten künstlerischer Bilder in der Schule*, Leipzig, A. Haase, 1916, p. 20.

The lithography *Dear Homeland, Adieu!*, by Walter Strich-Chapell (1877-1960), which appeared in 1901, as number 38 in a series, via the publishing house of B.G. Teubner, exemplifies the love of *Heimat* as it was to be promoted through art.

Looking at the picture, the local environment seems to be displayed as having intrinsic worth. At the same time as being an expression of a bond with nature and a love of *Heimat*, the lithography represents the fundamental meaning of the homeland, which is augmented by the significance of the subject's leave-taking. At a time of increasing urbanisation, this motif distinguishes itself from the 'asphalt culture' of the cities. The rise of nervous life³⁶ as bemoaned by cultural critics is nowhere to be seen; in contrast, one senses the peace of morning and the protective security of *Heimat*, brought together through expressive content and the idealisation of nature. In light of the picture's straightforward declaration, it is not surprising that the lithography enjoyed huge success as a decorative feature in schools; its easy comprehensibility, its simple composition, and its association with the folk music of the time were praised. Here the internalisation of the national consciousness comes into being through the *Heimat* principle³⁷. Without a doubt, this lithography is the pictorial realisation of the proximity to *Heimat* and nature that was expected in the art, pedagogy and politics of the time. It offers links that can be used to awaken and renew the love of *Heimat* landscape³⁸, it had the ability to nourish pedagogical hopes that a patriotic standpoint could grow out of the aesthetic contemplation of the natural world of *Heimat*.

The use of lithography as a decorative feature in schools was an addition to a multitude of initiatives aimed at creating opportunities for pupils to contemplate *Heimat* in an artistic way, initiatives led by reform-orientated groups who had been inspired by the art education movement³⁹. In the context of these efforts, the key element was that of the experience: an aesthetic recognition (the «*ästhetische Schau*»), which, with reference to Schopenhauer, was framed as contemplation, and enabled elevation to a higher level of existence⁴⁰. The nature of the homeland, envisaged in aesthetic landscape pictures, became the teacher of artistic perception and feeling. Even impressions of towns no longer appeared to the trained eye and emotionally-tuned heart as a pile of stones but

³⁶ See G. Simmel, *Die Großstädte und das Geistesleben*, in J. Schutte, P. Sprengel (edd.), *Die Berliner Moderne 1885-1914*, Stuttgart, Reclam, 1997, p. 125.

³⁷ See P. Joerissen, *Kunsterziehung und Kunstwissenschaft im wilhelminischen Deutschland 1871-1918*, Köln, Böhlau, 1979, p. 154.

³⁸ Cf. O. Paßkönig, *Das Kunstbild in der Schule*, «Allgemeine Deutsche Lehrerzeitung», n. 56, 1904, p. 232.

³⁹ These include, for example, the exercise books from the publishing house Scheffer, *Anregungen zur intimen Betrachtung der Leipziger Heimat [Suggestions for a closer look at the Heimat of Leipzig]*, issued by the Verein der Leipziger Zeichenlehrer [Society of Art Teachers in Leipzig].

⁴⁰ See R. Malte, *Wie wir unsere Heimat sehen*, «Neue Bahnen», b. 17, 1905/1906, p. 274.

as «*Lebewesen*, – das alte Haus, die Straße eine Gewachsenes, Gewordenes, ein *Eigenwesen*»⁴¹. Artistic pictures provided instruction for the «*Erziehung des Auges*»⁴². Pictures of *Heimat* served to train pupils' ability to feel; a love of *Heimat* and an appreciation of beauty shone out of them.

3.2. *Pictures for initial primary education*

In the production of wallcharts, the visual contemplation of art gave way to didactic aims. Even so, artists exhausted the simple, wholesome and trusting home-loving motifs⁴³. The general pedagogical and didactic demand for wallcharts to be comprehensible and morally appropriate developed into a plea for a more nature-orientated focus, targeted at ordinary people and centred on the subject area of *Heimat*. *Heimat* was seen as the legitimate basis of the world of thought and ideas. Consequently, the numbers of wallchart series that conformed to the '*Heimat* imperative' increased: the content of the educational images was allowed to stem from no soil but that of the *Heimat*⁴⁴. The ideology of the wallcharts was accordingly «*bodenständig*». As a reaction to industrialisation and modernisation, as well as in contrast with modern city life, the idea of *Heimat* became a point of reference for wholesome things: «Nur mit einem tiefen, unverlierbaren Heimatgefühl in der Brust [...] darf er sich in die Gefahren hinein wagen [...] Möchte es der Volksschule gelingen, dieses rettende Heimatgefühl [...] in die Brust der kommenden Geschlechter pflanzen zu helfen»⁴⁵.

The wallchart *Village* is one of these pictures which were intended to evoke the sense of a redeeming *Heimat*. Originating from the year 1875 as the third, modernised version of the series *Wilke's Wallcharts for Primary Education*, it was published by Friedrich Wreden of Braunschweig⁴⁶. Several teaching guides, intended for use as a preparation aid prior to use of the pictures in class, accompanied the series⁴⁷. This comprehensive portrayal is dedicated to the

⁴¹ *Ibid.*, p. 281.

⁴² Cf. A. Lichtwark, *Erziehung des Auges. Ausgewählte Schriften*, Frankfurt am Main, Fischer, 1991.

⁴³ See J. Volkelt, *Kunst und Volkserziehung*, München, Beck, 1911, p. 92.

⁴⁴ See H. Wolgast, *Die Bedeutung der Kunst für die Erziehung*, Leipzig, Wunderlich, 1903, p. 17.

⁴⁵ Stiefelhagen, *Die Heimat im Unterricht*, «Die Lehrerin in Schule und Haus», n. 18, 1901/1902, p. 914.

⁴⁶ A comprehensive discussion of the series and an account of its history can be found in K. Dröge, *Zwischen Innovation und Relikt: Wilke's Anschauungsbilder. Zur Frühgeschichte des schulischen Wandbilds*, in S. Baumeister, J. Carstensen, *Beiträge zur Volkskunde und Hausforschung*, Band 7, Detmoldt, Westfäl. Freilichtmuseum, 1995, pp. 51-94.

⁴⁷ See for example J.F. Ranke, *Anleitung zur Behandlung von Wilke's Bildertafeln für*



Fig. 1. *Dear Homeland, Adieu!* [Lieb Heimatland ade!], B.G. Teubner, Leipzig, 1901. (Courtesy of the Research Centre for Historical Visual Media, Würzburg).

concept of *Heimat*. As a consequence, a discussion of *Village* is included in the chapter «Heimatort» in Heinemann; it begins with comments about people's mutual dependence on each other and goes on to deal with the meaning of community spirit. Finally Heinemann writes of birthplace: «Hier wohnen eure Eltern, hier seid ihr zu Hause oder *daheim*, es ist eure *Heimat*. «“Jeder Mensch hat seine Heimat lieb und hält sie wert [...]. Wer sie nicht kennt, dem ist es eine Schande und ein Schade an Herz und Verstand [...]”»⁴⁸. The adverbial «Daheim» not only has an emotional but an ethical and moral dimension. A constituent system of moral values underlies the portrayal of the public sphere of the village street. *Heimat* gives people a sense of utter fulfilment and integrates them into a community structure, which, as an antidote to an increasingly individualistic

den Anschauungsunterricht in Kleinkinder- und Elementarschulen, Braunschweig, Wreden, 1880; L. Heinemann, *Handbuch für den Anschauungsunterricht und die Heimatkunde: mit Berücksichtigung der neuen Ausgabe der Wilke'schen Bildertafeln*, Braunschweig, Wreden, 1875.

⁴⁸ Heinemann, *Handbuch für den Anschauungsunterricht und die Heimatkunde*, cit., p. 121.

society⁴⁹. stresses unity and reciprocal human relationships. From the inn to the church, this detailed wallchart envisions a meaningful unit in which the various activities are depicted in a manner that appears true to life. One is given the impression that *Heimat* is being portrayed «in ihrer Wirklichkeit»⁵⁰, along with its villages and towns, and its people. This conjured-up reality was, however, accentuated by a *generalised construction* of *Heimat*. In reality, charts for initial primary education promoted an ‘objectification’ of the *Heimat* concept. Crowd pictures, such as Wilkes’ wallchart, mostly depicted rural scenery throughout the seasons and, by rejecting the inclusion of any regional peculiarities, effectively offered *every* school child a *Heimat*. In this way, *the* vision of *Heimat* was formed that would shape the way *Heimat* was dealt with in primary education until the post-war years, i.e. as an idealised, ideologically-charged visualisation. It romanticised agriculture, was narrowly provincial, and portrayed its subject matter as an idyll, depicting *Heimat* through peaceful village life, traditional farming methods, and the illustration of *genuine* work and customs.

Educational wallcharts, whose production was, to a large degree, aimed at the needs of a trans-regional market, succeeded in accomplishing the apparently paradoxical task of projecting a picture of *Heimat* which gave the observer the sense that they had their roots in the depicted setting, regardless of its subjective location. A generality was created in the pictures, which themselves contained no individually-influenced references to reality and, by precisely these means, had the potential to depict a location that could be recognised, on an aesthetic level, by everyone. In this way, the pictures obviated the risk of ‘fragmentation’ that was a concern for the teaching profession at the beginning of the 20th century. This fragmentation, which was cropping up nationwide, was caused by the *Heimat* principle being overloaded⁵¹, in cases where, as a result of teaching being geared towards regional peculiarities of *Heimat*, the general principles that are true for all pupils were lost⁵².

On occasions when it was necessary for the *Heimat* concept to overlap with that of the fatherland, it was impossible for *Heimat* to remain confined to provincial images. *Heimat* pictures did not merely present the German population’s home soil as a subjective place, but transformed the personal frame of reference into an ‘objective’ sphere, which had primarily to fulfil the requirement to be an aesthetic portrayal of the world⁵³. In this respect, *Heimat* was

⁴⁹ See in particular the discussion about differences between community and society: F. Tönnies, *Gemeinschaft und Gesellschaft. Grundbegriffe der reinen Soziologie*, Berlin, Curtius, 1912.

⁵⁰ Kerp, *Führer bei dem Unterricht in der Heimatkunde*, cit., p. 42.

⁵¹ Weitkamp, *Heimat und Unterricht*, cit., p. 114.

⁵² *Ibid.*

⁵³ Cf. J.F. Herbart, *Über die ästhetische Darstellung der Welt als das Hauptgeschäft der Erziehung*, in O. Willmann, T. Fritsch (edd.), *Johann Friedrich Herbart's Pädagogische Schriften*,

ein Stücklein natürlich gewordener, gesunder Landschaft, ihr natürlicher Boden mit seiner angestammten Pflanzenwelt, der dazu gehörigen Tierwelt und den menschlichen Bewohner mit ihrer ganzen geschichtlichen Entwicklung⁵⁴.

In primary education, especially, the idea of *Heimat* was based on children gaining a sense of intimacy with nature. However, the production of pictures was not limited to educating primary school pupils.

3.3. «*Heimat*» as geographical reference point

More and more publishers of educational wallcharts took up the cause of furthering *Heimat* education. Used in, but not limited to, primary education, diverse pictures conveyed the meaning and aim of the all-encompassing *Heimat* concept, both in their form and through their content⁵⁵. As early as the period which immediately followed the First World War, a wealth of wallchart series were published, in whose titles the term *Heimat* was necessarily present. Around this time, the meaning of *Heimat* became an experienced and experiential state of utter attachment to one's native soil, as it was described by Spranger in 1923⁵⁶. Factual expertise was no longer in the foreground, being replaced by an increasingly intense attachment to the sense of a German nation that was being idealised at that time. Whole series of *Heimat* pictures appeared on the market: *Heimat* pictures from Bavaria, from Luneburg Heath, from Westphalia, from East Prussia, *Heimat* pictures from the Rhineland and the Margraviate of Brandenburg⁵⁷. In other words, educational publishers discovered the attraction of the idea of *Heimat*, and it is not surprising that during this time there were warnings that *Heimat* had become a buzz word: «Man nutzt den heimatkundlichen Einschlag [...] als Aushängeschild, als besondere Empfehlung, daß man auf der Höhe ist. Damit aber wird der Gedanke der Pflege des Heimatsinns zu einer Geste, zu einer Phrase»⁵⁸.

Osterwieck/Harz, Zickfeldt, 1913, Vol. I, pp. 87-112.

⁵⁴ Hans Menzel quoted in Tecklenburg, *Schule und Heimat*, cit., p. 57.

⁵⁵ Educational wallcharts were not limited depictions of the natural world; trades were also portrayed, as can be seen in the pictures from the series of Dresden publishing house C.C. Meinhold & Sons, *Handwerkerbilder für Anschauungsunterricht und Heimatkunde*. Along with knowledge of the working world and associated tools, materials and processes, it was important «that children learn[ed] to proudly place worth on the work of their *Heimat*, including factory work». See Bauer, *Und noch einmal Heimat*, cit., p. 135.

⁵⁶ See E. Spranger, *Der Bildungswert der Heimatkunde*, in Id., *Philosophische Pädagogik*, Heidelberg, Quelle & Meyer, 1973, p. 298.

⁵⁷ See Lehrmittkatalog Schulwart, *Lehrmittelführer für das gesamte Schulwesen*, Leipzig, [s.n.], 1920.

⁵⁸ Schlosser, *Der Heimatgedanke und das Buch*, «Die Mittelschule», n. 39, 1925, p. 134.



Fig. 2. *Village* [Dorf], Friedrich Wreden, Braunschweig 1875. (Data collection belonging to the Research Centre for Historical Visual Media, Würzburg. Courtesy of the Research Centre in Würzburg).

The wallchart *The Moselle Valley* (Cochem) is an example of a picture from the aforementioned *Heimat* series. This work by Richard Pfeiffer (1878-1962) appeared in the series *Heimat Pictures from the Rhineland* selected in Essen by educational civil servant Klar and published by Rudolf Schick and Co. in Leipzig. Particularly in the 1920s, this firm specialised in the production and sales of educational wallcharts, amongst other things.

The symbiosis of open space and familiar security is characteristic of these pictures. The observer wanders through the countryside and gazes agreeably at each detail. At the same time, the overall impression remains in sight. The choice of colour and composition of the picture convey calm and a sense of security. *Heimat* pictures have a rewarding function: they provide places of refuge and orientation points. In the commentary for the picture, the extraordinary richness

of form⁵⁹ of this old «Kulturlandschaft»⁶⁰ is emphasised; the depicted ‘elements of beauty’ are carefully described and elevated to a position of relevance for the observer’s ‘own identity’. A connection is deliberately drawn between the pictures and national historical events. Whether pictures were of the landscape or historical town centres, pedagogical and political pretensions were aimed at ‘rooting’ them in nature, as defined by the concept of *Heimat*, as well as in national history⁶¹.

These wallcharts represent a unique logic in the construction of knowledge and meaning. «Es darf [...] nicht dem Zufalle überlassen bleiben, ob und wie sich die Schüler mit der Heimat bekannt machen»⁶². Within this political and pedagogical intentionality it was important to construct *Heimat* localities which could preserve idylls and desires. The wallchart had the task of making standardised blueprints that were congruent with the imagined world of *Heimat*. Typically enough, Winzer asserts: «Die Schule hat die heimischen Vorzüge in den Schüler zu festigen und weiter zu führen, die Nachteile zu unterdrücken»⁶³. In those places where *Heimat* has been singled out as the very basis, the root of healthy growth, as its fertile soil, the school had to send children on their way with the right *Heimat*-related notions⁶⁴. In light of *Heimat*’s influential power – «wir danken alles der Heimat»⁶⁵ – it was absolutely necessary to channel its effective potential into orderly rows, that is to say, to put things in order⁶⁶. Consequently, *Heimat* was most often depicted in wallcharts as ‘soothing landscape’⁶⁷ with an expression of anti-modernity, which romantically closed the observer’s eyes to reality. In view of the contingency of existence, efforts were made to imply continuity and coherence using the wallcharts, and to translate these ideas to the formation of (national) identity.

⁵⁹ *Berichte über neue Lehrmittel, Heimatbilder aus Westfalen*, «Schulwart», vol. XXVI, 1929, p. 41.

⁶⁰ *Ibid.*

⁶¹ G.L. Mosse, *Ein Volk, ein Reich, ein Führer. Die völkischen Ursprünge des Nationalsozialismus*, Königstein/Ts., Athenäum-Verl., 1979, p. 25.

⁶² Clemenz, *Heimatkunde*, cit., col. 693.

⁶³ Winzer, *Die Bedeutung der Heimat*, cit., p. 5.

⁶⁴ See Stiefelhagen, *Die Heimat im Unterricht*, cit., p. 913.

⁶⁵ Winzer, *Die Bedeutung der Heimat*, cit., p. 5.

⁶⁶ The influence of *Heimat* on the people was achieved through habitualisation, from which it was inferred that it was a school’s duty to promote the correct sort of effects: «If a human being is, first and foremost, a child of *Heimat*, and in spite of all other influences remains as such, it is a school’s duty and task to promote *Heimat*’s influence». (Kerp, *Führer bei dem Unterricht in der Heimatkunde*, cit., p. 21).

⁶⁷ H. Bausinger, *Heimat in einer offenen Gesellschaft. Begriffsgeschichte als Problemgeschichte*, in Cremer, Klein, *Heimat, Analysen, Themen, Perspektiven*, cit., p. 79.



Fig. 3. *The Moselle Valley* [Moseltal] (Cochem), Rudolf Schick & Co., Leipzig 1927. (Collection belonging to the Research Centre for Historical Visual Media, Würzburg. Courtesy of the Würzburg Research Centre).

The picture *Blast Furnaces*, published by educational civil servant Heinrich Winkel of Gelsenkirchen, represents a notable exception to this tendency. Painted by Hermann Peters (1886-1970) in the series *Heimat pictures from Westphalia*, it constitutes a clear departure from the dominant subject matter of landscapes portrayed as idylls. The picture shows the steelworks belonging to the Bochum Society of Incorporated Steelworks, with its imposing slag heap and its mass of glowing slag, along with a small settlement in the foreground. The sky and the surroundings appear dreary, drab and polluted. A longing for a specific kind of world, which is contained in the concept of *Heimat* is, as it were, replaced by disillusionment here. The inherent positive connotation that usually accompanies the concept of *Heimat* remains elusive and the observer's reaction is to conjure up a vision of a more beautiful world. That which the picture fails to achieve must, therefore, be realised through language. Correspondingly, an art review of the time stated: «In der künstlich entstandenen Mulde sind ein paar armselige Häuser übrig geblieben, die auf ihr Ende zu warten scheinen, damit

ihre Bewohner in neuen, schöneren Siedlungen bald ein menschenwürdigeres Unterkommen finden möchten»⁶⁸. There can be no *Heimat* here!⁶⁹

Conclusion

«Was würde eine Nation sein ohne eine bodenständige, heimatsichere, heimatfeste und heimatliebende Bevölkerung?»⁷⁰.

The idea of *Heimat* required the creation of a collective space that provided points of reference, built up a positive self-image and conformed to political goals⁷¹. Schools contributed to the realisation of these aspirations. The ‘bedrock’

⁶⁸ *Berichte über neue Lehrmittel*, «Schulwart», vol. XXVI, 1929, p. 41.

⁶⁹ The implicit inverted «glowing heart» on the slag heap is of particular note in this picture. One interpretation of this might be the painter Hermann Peters’ bond with the region. See G. Kill, *Der Maler Hermann Peters*, «Vestischer Kalender», vol. 1955, pp. 65-67. At the same time, this might refer to the pulsing ‘iron heart’ of the Ruhr.

⁷⁰ Tecklenburg, *Schule und Heimat*, cit., p. 68.

⁷¹ The debate about the topic of «*Heimat* in educational wallcharts» also encompasses the National Socialists’ ideological concept of *Heimat*, and covers the visualisation of a loss of *Heimat* in the post-war period in Germany, as well as the expounding of the problems of the term *Heimat* in the 1960s. At this point, only a brief explanation of this complex topic will be provided. The appropriation of the concept of *Heimat* by the National Socialists and its portrayal on wallcharts after 1933 was in the context of the party’s expansionist international politics. Although, for the most part, the traditional line of rural depictions of the seasons with their romanticised agricultural, pictorial language was followed in the 1930s and 1940s, new pictures which were ideologically-charged with the theme «German folklore worldwide» came into being for the upper echelons of society, increasing the use of the *Heimat* concept for political functions. The various elements of the concept of *Heimat* were then communicated to the German population and incorporated into German society. Cf. A. Bastian, *Der Heimat-Begriff: eine begriffsgeschichtliche Untersuchung in verschiedenen Funktionsbereichen der deutschen Sprache*, Tübingen, Niemeyer, 1995, pp. 133 ff. Education formed the basis for encouraging people to take pride in German *Heimat*, heritage, citizens und Führer. Cf. J. Korfkamp, *Die Erfindung der Heimat. Zu Geschichte, Gegenwart und politischen Implikaten einer gesellschaftlichen Konstruktion*, Berlin, Logos, 2006, p. 56. The wallchart *Heimat* is calling [*Die Heimat ruft!*] from 1940, painted by Willy Planck (1870-1956) issued as number 268 by the publisher *Der praktische Schulmann*, in Stuttgart, represented a particularly vivid pictorial example of this. In the post-war period, issues surrounding the loss of *Heimat* were raised in wallcharts. In this respect, the wallchart *Driven away from home* [*Heimatvertrieben*], published by the *Schropp’schen Lehrmittelanstalt KG* in 1956, is of particular significance. A *Heimat*, that no longer exists is visible here as a change. The wallchart portrays the displacement of these people who had been driven away from their homeland. The represented area harks back to Germany with her 1937 borders. The surrounding countries outside the borders have been shaded out into a grey zone. In the 1960s, problems with the concept of *Heimat* were expounded and efforts were made to make it less ideological, which can be seen, above all, in wallchart production for primary education. This trend found expression in a change in the style and form of wallcharts. Wallcharts were created in a different way to meet requirements for pupils to receive up-to-date qualifications, and for a scheme of education that was ultimately factual. *The Farm* [*Der Bauernhof*], published around 1970 by publishing house Köster & Co. in Munich, is a prime example of this. See W. Müller, I.K. Uphoff, *Zwischen Anschauung, Gesinnungsbildung*



Fig. 4. *Blast Furnaces [Hochöfen]* (Westphalian Colliery), Rudolf Schick & Co., Leipzig um 1920. (Collection belonging to the Research Centre for Historical Visual Media, Würzburg. Courtesy of the Würzburg Research Centre).

of *Heimat* politics was replicated in lesson plans and visual media used in schools. Authorities were chiefly concerned with promoting unity within the basic principles of nation and fatherland, with love of *Heimat* as a solid basis. An industrious public spirit, in which people are willing to make sacrifices⁷² was also accumulated as a kind of systematic knowledge. Schools became places where knowledge of common ground was firmly established. At the same time there were concurrent projections of self-identity and the ‘other’, which shaped ideas and guided behaviour. This process was supported to a significant extent by the use of educational wallcharts. These educational media were central to people’s understanding of their global orientation and the nurturing of

und Belehrung. Die Heimatkunde im Siegel des Mediums Schulwandbild, in M. Götz, *Zwischen Sachbildung und Gesinnungsbildung. Historische Studien zum Heimatkundlichen Unterricht*, Bad Heilbrunn, Klinkhardt, 2003, pp. 41-62. A dedicated analysis of the manner in which *Heimat* was visualised in wallcharts has not yet been undertaken; this constitutes an area of research which needs further exploration.

⁷² A. Richter, *Die Heimat im Geschichtsunterrichte*, «Deutsche Blätter für erziehenden Unterricht», n. 16, 1889, p. 61.

identity within defined boundaries. As a ‘silent educator’ in the love of *Heimat* educational wallcharts constructed an aesthetic and didactically-manipulated pedagogical and political vision of a space that served as the foundation for a subjective and collective sense of self. This construction ranged from portraying an ‘objective’ image of *Heimat* as a ‘sound’ grounding in natural circumstances, to decoratively depicting regional peculiarities as a ‘*Heimat*-related character study’. All the while, *one* factor remained constant: the area that had originally been merely geographical became an area of meaning. In the context of a «politics of imagery»⁷³ and, simultaneously, in their function as a didactic medium, educational wallcharts point to the meaning of the word *Heimat*. The importance of a sense of self and those things that were related to the fatherland became visible through the pictures, along with a cultural and national self-image. In terms of iconography, *Heimat*’s patriotic strength bound together the local sphere with external political and geographical borders: devotion to the countryside of *Heimat* and its inhabitants⁷⁴ was elevated to become an all-encompassing source of power; it became a «Wegweiser» to finding one’s way throughout the whole world, as well as in the struggle for existence⁷⁵. In this respect, the creation of a multidimensional concept of *Heimat* was a sweeping act, which considerably affected the ‘fate’ of the nation and its *Heimat*-located sense of ‘self’.

⁷³ J. Rancière, *Politik der Bilder*, Berlin, Diaphanes, 2005.

⁷⁴ Felgner, *Heimatkunde als Mittelpunkt des gesamten Unterrichts im dritten Schuljahre*, cit., p. IV.

⁷⁵ *Ibid.*

Celebrating *Italianità*: the teaching of the Italian language and culture in ethnic schools in Paraná, Brazil

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ABSTRACT: The goal of this article is to understand how ethnic Italian schools, supported by partnerships of mutual-help, acted in promoting *Italianità* (Italian identity) among the children of Italian immigrants from 1885 to 1930 in Paraná/Brazil. The sources used for researching this matter were the official letters and petitions issued by the Italian Ministry of Foreign Affairs. The analysis of the empirical field was performed through the theoretical contribution from Cultural History. Five Italian secular ethnic schools were created in the 19th and 20th centuries. These schools were very relevant in educating Italian immigrants' children and their descendants. Besides teaching the Italian language and culture, these schools sought to celebrate the Italian civic holidays, with the objective of building up and preserving the Italian character, that is, the *Italianità*, through the perspective of Italian state policies post-Unification.

EET-TEE KEYWORDS: Foreign Schools; Ethnic Group; Cultural Identity; Immigration; Brazil; XIX-XX Centuries.

Introduction

Italianità was created as a symbol that incorporates both the defense and preservation of cultural aspects of the Italian peninsula in its meaning. It was a movement engineered and applied by agents of the Italian government in an attempt to create a national identity.

In the State's point of view, it was the policy started by the Italian first minister Francesco Crispi in 1887 that made *Italianità* a symbol of the Italian culture and identity. It was specially meant to be the symbol of those who had emigrated.

The objective was to strengthen the Italian state and economy by using the modernization of the immigration process and assistance to expatriates. Thus, Crispi's immigration policy was basically characterized by two guidelines: to tutor and protect Italian people abroad and maintain their connection to their homeland. The school assistance provided to those who emigrated to America was used as a primary tool to introduce the feeling of *Italianità*¹.

The concept of *Italianità* is based on the knowledge, propagation and maintenance of the language, history, politics, economics, in short, the Italian culture, as a representation of the feeling of ethnic belonging and national unity, that is, of the making and being Italian.

In the city of Curitiba, capital of the state of Paraná/Brazil, the propagation and maintenance of the feeling of *Italianità* created by the Italian State, was put into place by the Italian mutual-help associations, which even had financial help from that country in order to fulfill its purpose. These mutual-help associations, organized by the enrollment of members of Italian origin, had the objective of supporting financially those members who would fall ill, achieve elderly age or were unable to work. More than that, they were organized as places to propagate and celebrate the Italian language and culture.

Some of those associations played a very important role in the construction, celebration and maintenance of the *Italianità* by means of ethnic schooling, for they had the benefit of teaching the Italian language and culture to the members' children. There were several associations of Italian origin all over the state of Paraná. The majority were located in Curitiba: *Società Italiana di Mutuo Soccorso Guiusepe Garibaldi*, *Círculo Italiano 20 de Setembro*, *Società Regina Margherita* – female branch of *Società Garibaldi*, *Dante Alighieri* of Curitiba, *Dante Alighieri* of Ponta Grossa, *Società Italiana di Mutuo Soccorso Vittorio Emanuele III*, *Società Italiana di Mutuo Soccorso Vittorio Emanuele II*, *Società Italiana Operária Vêneta di Beneficenza di Santa Felicidade*, *Società Italiana di Mutuo Soccorso Cristoforo Colombo*, *Società Rosa di Natale* – for the daughters of the members of *Società Garibaldi*, *Società Operária Beneficente Internazionale di Água Verde* and *Società Italiana di Beneficenza Livorno Ítalo-Brasileira*.

Among the Italian associations herein analyzed, six of them kept an ethnic school. Until 1930, the following Italian schools were still operational: *Scuola Regina Margherita*, maintained by *Società Guiusepe Garibaldi*, established in 1887; *Centro di Istruzione Italiana Dante Alighieri*, maintained by *Società Dante Alighieri* of Curitiba, established in 1896, *Scuola Dante Alighieri* maintained by *Società Dante Alighieri* of Ponta Grossa, established in 1903; *Scuola Principessa Jolanda* maintained by *Società Vittorio Emanuele III* established in 1904; *Scuola Principessa Mafalda*, established in 1904 in the city of Bella Vista;

¹ A.L. Cervo, *As relações históricas entre o Brasil e a Itália: o papel da diplomacia*, Brasília, UNB, 1992, p. 2.

Scuola Santo Antonio maintained by *Società Cristoforo Colombo*, established in 1910 in the agricultural colony Alfredo Chaves.

These were private schools that were subsidized in part by the Italian government and in part by the members. They provided secular teaching and had an average of 100 students. The main function of these schools was the maintenance and propagation of *Italianità*, favoring the teaching of the Italian language and culture over the Portuguese language.

The present article seeks to understand how these ethnic Italian schools that were maintained by mutual-help associations in Paraná/Brazil acted in propagating *Italianità* among the immigrant children, from 1885 to 1930, by means of national festivities and celebrations and the teaching of the Italian language and culture.

1. *The perpetuation of Italianità by means of teaching the Italian language and culture and the celebration of civic holidays*

Founded by a group of Italian immigrants and some nationals in 1883, *Società Italiana di Beneficenza Giuseppe Garibaldi* had the purpose of promoting celebrations of Italian civic holidays, mutually helping its members and educating children. The first Statute of this association informed about their main activities and the criteria for their creation:

Article 3 - The objective of this association is material, moral and intellectual beneficence and, for this reason, it is able to provide to its members financial subsidies in case of inability to work, illness or elderly age, and promote education, morality and progress.

Article 4 - This association accepts Italian men, women and children, under the terms of admission common to all members of any condition or state².

The creation of a school that could assist children permeated the justification for such an association. In an official letter sent to the president of the Province of Paraná on December 2nd of the same year, Giovanni Corghi, president of *Società Giuseppe Garibaldi*, requested donations from the state of Paraná for the construction of a school building.

As we researched the *Annuari delle Scuole Italiane All'estero* of the year of 1896, we verified that Felippe Rogeri, the Italian consul of Villanova, supported the only Italian school existent in that period in Curitiba, connected to the *Società Giuseppe Garibaldi*, located in downtown Curitiba³. Starting in 1904, the *Annuario* provided information that there were two more Italian schools

² *Statuto da Società Italiana Giuseppe Garibaldi*, 1884, p. 2.

³ Itália, *Annuario delle Scuole Italiane All'estero governative e sussidiate*, Roma, Ministério degli affari esteri, 1896. p. 6.

in Curitiba: one connected to *Società Dante Alighieri* and another called *Principessa Jolanda*⁴. The same document described that the Italian school *Principessa Jolanda* had an enrollment of 31 boys, thus being an all-male school. With slightly different characteristics, the school connected to *Società Italiana di Mutuo Soccorso Cristoforo Colombo* was established in the urban part of the Alfredo Chaves colony. It is also noteworthy that the *Società Cristoforo Colombo* was established within an agricultural Italian colony and its creation was motivated by immigrants who were more financially privileged.

The aforementioned association was created on October 1st, 1905 and it served its members exclusively. According to its Statute, the objective of this institution was to promote well being, morality and education.

Sociedade Geral de Mutuo Socorro Cristoforo Colombo, of Vila Colombo, under the sponsorship of Sao Jose, established on October 1st, 1905, has the objective of encouraging the fraternization and mutual help of its members, promoting well-being, morality and education⁵.

The Italian school was partly supported by the government of Italy and partly by members. It was called *Scuola Santo Antonio* and it was categorized as a *Regia Scuola Italiana* – one of the school categories of the *Scuole Italiane All'estero*. The first record about its existence dated from 1906 in the chapter titled *Scuole Italiane* by Carlo Parlagreco, in the book *Il Brasile e gli Italiani*. According to this document, the school had an enrollment of 74 students that year⁶. In 1910, the school was closed due to the government of Paraná denying subsidy, based on the fact that all classes were taught exclusively in Italian.

Besides the *Scuole Italiane All'estero*, maintained by the Italian government through the supervision of the *Regio Consolato Italiano*, *Società Dante Alighieri* was pivotal for the spreading of *Italianità* by means of establishing and maintaining Italian schools abroad. As mentioned by Salvetti: «the school should be the main tool used by Dante's foreign committee to spread the Italian language and culture abroad»⁷.

According to Amado Luiz Cervo, Giacomo Venezian created this association in Italy in 1889, specifically to spread the language, culture and Italianicity, emphasizing its secularity, and it soon spread throughout the countries that received substantial Italian colonization⁸.

⁴ Itália, *Anuario delle Scuole Italiane All'estero governative e sussidiate*, Roma, Ministério degli Affari Esteri, 1904, p. 12.

⁵ *Statuto dela Società Generali di Mutuo Soccorso Cristoforo Colombo*, 1909, p. 2.

⁶ C. Parlagreco, *Le scuole Italiane*, in *Il Brasile e gli Italiani. pubblicazione dei Fanfulla*, Firenze, R. Bemporad & Figlio, 1906, pp. 796-801.

⁷ P. Salvetti, *Immagine nazionale ed emigrazione nella Società Dante Alighieri*, Roma, Bonacci, 1995, p. 15.

⁸ Cervo, *As relações históricas entre o Brasil e a Itália*, cit. p. 3.

Società Dante Alighieri in Curitiba maintained an Italian school also known as *Centro di Istruzione Italiana* or *Scuola Dante Alighieri di Curitiba*. The *Centro di Istruzione Dante Alighieri* was created in 1896, with the contribution of *Régio Cônsul* Felipe Rogeri de Villanova. Until the beginning of the year 1900, that school operated in a house located in front of the Santos Andrade Square. According to the document sent in 1899, the president of this association, Orestes Códega, requested public subsidy for the *Centro di Istruzione Dante Alighieri*. However, his request was denied:

By means of its president, the Centro de Instrução Dante Alighieri, urges for the payment of overdue contributions, according to article 11 of the Permanent Dispositions of the Budgetary Law, since it has been approved by vote in the State Congress to contribute with an importance of one Conto de réis⁹ per year, and this Center has been operational for three months already¹⁰.

Italian families were left in charge of supporting this school, and also the operations of the association, in conjunction with the Italian government, which sent financial resources and educational material. This situation lasted until 1911.

In September of 1912, another *Scuola Dante Alighieri* was opened in the state of Paraná, this time in the city of Ponta Grossa. On this same date, the building that housed that school was completed. In 1913 the school began to receive support from the government of Paraná in the amount of 1:200\$000 réis. The Italian Unification in the 1860s made the need to build a strong and cohesive state evident, instilling the feeling of national unity. The Italian government was concerned about creating a nation, building a united and unique Italy. For this purpose, the State had to be strengthened, imprinting in its population a feeling of belonging – an Italian nationalism – the *Italianità*. According to Patrícia Salvetti, in this context schools became a pivotal tool used to instill identity:

[...] the purpose of Italian schools abroad, «the focus of national education and patriotism», put under the direction and control of the Italian State, surpassed the simple primary objective of basic education to immigrants and their children and took a role that was markedly political: safeguarding the Italian language as a means of maintaining a strong connection among expatriates and their mother land and the education of Italian immigrants as a tool of cultural and political influence and commercial diffusion¹¹.

The associations of mutual-help, which were organized by their membership, had the objective of financially supporting its members in case of sickness, elderly age and inability to work. Some received help from the Italian government and

⁹ «Réis» was the currency used in Brazil at the time. «Conto de Réis» refers to one million réis.

¹⁰ Paraná, Departamento Estadual de Arquivo Público, *Requerimento*, 1900, p. 69.

¹¹ P. Salvetti, *Le scuole Italiane all'estero*, in P. Bevilacqua, A. De Clementi, E. Franzina, *Storia dell'emigrazione Italiana*, Roma, Donzelli Editore, 2000, vol. 2, pp. 535-546, in particular p. 535.

had the scope of characteristics of associations formed by immigrants and their descendants. The foreign population that was assisted by the first mutual help associations was formed by families that were settled in downtown Curitiba and represented part of the emigrated Italian elite. They were linked to the interest in spreading *Italianità* promoted by the Italian government, and were concerned with promoting their culture. The associations shared national ideals to affirm identity recognition, kept in contact with consular agents, traveled frequently to Italy and guided the social and cultural life of the city¹².

According to Deliso Villa, in Italy, *Italianità* represented the interests of a dominating elite that wished to mold the Italian nation. Therefore, the spread of secular education proposed to be applied in schools did not correspond to the reality and wishes of the colonials settled in rural areas, or yet, of great part of the population that lived in Italy¹³. Thus, the Italian associations assisted a group of immigrants that came to the state of Paraná with a very favorable financial situation. The schools connected to these associations prescribed a secular, liberal education based on the ideals of forming a state/nation. They had a clear role and a specific characteristic, and thus became restricted to a small portion of the emigrated Italian population.

Scuola Regina Margherita—the first Italian school in Paraná—began operations in the year of 1893, ten years after the establishment of that association, under the direction of the teacher Giovanni Pivato. This school counted with the financial support of the state of Paraná and the Italian government. According to an attendance chart dated from March 31st, 1893, the number of enrolled students was 25 of both genders. Children of Italian immigrants only attended the school. That document indicates that *Scuola Regina Margherita* had very low enrollment, represented by the small number of privileged Italian families of downtown Curitiba. Thus, the consolidation of this school demanded that those in charge made significant efforts to keep it open and thus guarantee the financial support sent by the Italian government.

On February 7th, 1895, the board of directors of *Società Giuseppe Garibaldi* launched a «Campaign for Membership». The goal was to increase the number of members, and consequently have more students for the school.

The beneficent Italian association, with the objective of increasing the number of members as much as possible, so that the benefactor spirit of such association can be better achieved, believes that, on the meeting that took place on January 6th of 1895, we shall grant entry to members who, for private reasons, had abstained from such a useful association. The only condition imposed in order for them to be reintegrated as members is to enter, as determined

¹² D. Bortolotti, *Il Brasile Meridionale*, Roma, Casa Editrice Alberto Stock, 1930, p. 361.

¹³ D. Villa, *Storia Dimenticata*, Porto Alegre, Est Editora, 2002, p. 135.

by article 13 of our statute, without the need to pay a new membership fee. Therefore, you are invited, if you choose to do so, to continue to be a part of our association, which offers not only help in case of sickness, but also the right to send your children to the Italian School established by this association¹⁴.

From the very beginning, *Società Giuseppe Garibaldi* performed all the activities it was set out to do with its members. One of the first celebrations was that of September 20th, date on which Rome was taken by Garibaldi's troops in the process of Italian unification.

Still in 1895, this celebration was observed in order to remember the conquests of the Italian state in the process of Unification, as cited in the local newspaper «A República», on September 24th.

Sociedade Giuseppe Garibaldi also celebrated the date – September 20th – with a banquet at Hotel Lombardo followed by a splendid ball, which lasted until dawn, with great gladness among all and great order, all guests leaving pleased by all the attention paid by the dignified members of that beneficent association. The date marked by the unification of Italy – one of the greatest conquests of our time, which brought attention to the immortal genius of Victor Emmanuel and the names of eminent statesmen such as Cavour and Mazzini and the generals Giuseppe Garibaldi and Gialdini – was celebrated amongst us by the Italians who live here¹⁵.

By the year of 1900, the Garibaldi Palace – name given to the magnificent building that housed that association – was finished. In this same year, *Scuola Dante Alighieri* began operations in that same building. Housing the Italian school *Dante Alighieri* may have been a strategy to expand their schooling initiatives, since *Scuola Regina Margherita* did not have a substantial number of students. The building was made of an ample physical space and privileged location, with several spacious rooms and located in the heart of the city. The great location and structure of the building that housed this mutual help association made evident the high costs for its maintenance. The associations made several attempts to gather resources to support the school, such as hosting parties, fairs and artistic performances. The following excerpt exemplifies the event that took place on June 4th, 1899 with the purpose of raising funds to support *Scuola Dante Alighieri*:

We published today a thank you message from the education center Dante Alighieri in the appropriate section, for the generous support to the party that took place at Teatro Hauer to benefit that same school. Double purpose had this great celebration: the support of the Dante Alighieri School, in which the education of children of the numerous Italian colony

¹⁴ W.O. Trombini, *Società Giuseppe Garibaldi: lutas e conquistas*, Curitiba, Edições do Autor, 2010, p. 136.

¹⁵ «A República», 1895, p. 1.

awakens the traditions of their homeland, making them worthy representatives in this State and contributing in a way to its prosperity and growth, and awakening the vocation to gymnastics and fencing, which so highly contribute to the development of physical education¹⁶.

In the year of 1900, *Scuola Regina Margherita* had an enrollment of 66 students, 51 of which were boys and 15 girls, children of Italians and some nationals¹⁷. According to a statistical report dated from 1902, Giovanni Pivato taught at the school and assisted a total of 46 students¹⁸.

The relationship between the Italian elite and the authorities of the state of Paraná was friendly. The presence of such authorities at the events that took place during the first few decades of the 20th century was always prescribed. On November 7th, 1904 the Italian Consul C. De Castiglio sent an official letter to the Secretary of Education informing that, on November 11th, there would be a ceremony to present a Brazilian flag to the Italian school. He requested the governor and his wife to be the flag's sponsors¹⁹. In the minds of the Italian scholars linked to the *Società Dante Alighieri* of Curitiba, the objective of the school went beyond the teaching of reading, writing and math. It carried a moralizing character, capable of forming values and molding childhood. According to the newspaper, «La Sentinella D'Itália» of 1917, a school «is not, and shouldn't be, a workshop where the first elements of human knowledge are taught, but a temple where the minds, hearts and character of the future generations are forged»²⁰.

For this reason, all initiatives towards the development of the feeling of *Italianità* made by the Italian associations were not restricted to the private universe of these institutions. In an attempt to involve the entire city, the *Italianità* was promoted through celebrations that reported the Italian and Brazilian communities to the Italian national holidays. According to another article printed in the newspaper «A República», on September 26th, 1901, the date of September 20th was celebrated as follows:

Last Saturday, a great festival took place, promoted by the respectable association Giuseppe Garibaldi to celebrate the glorious date on which the garibaldian forces entered Rome triumphantly. At 9pm, the excellent Italian-Brazilian band, directed by the brothers Puglielli, played the Brazilian, Italian and garibaldian anthems, at the palace belonging to the aforementioned association, which was filled with a large number of ladies and gentlemen. The session was presided by the distinguished Italian consul, sir Giovanni Silva, having as part of the table Mr. Pedro Bruno, president of the association, Captain Paulo

¹⁶ «A República», 1899, p. 1.

¹⁷ Report presented to Your Excellency Dr. Francisco Xavier da Silva, President of the State of Paraná, by Dr. Octávio Ferreira do Amaral e Silva, Secretary of the State of Internal Affairs, Justice and Public Education, on December 31st, 1900, Typ. Livraria Econômica, Curityba, 1901.

¹⁸ Paraná. Departamento Estadual de Arquivo Público. *Ofício*, 1902, p. 1.

¹⁹ Paraná. Departamento Estadual de Arquivo Público. *Ofício*, 1904, p. 49.

²⁰ «La sentinella D'Itália», 1917, cit.

d'Assumpção, Celestino Junior, our fellow journalist from the “Diário”, Pedro Violani, Pedro Boquino and the representative of this newspaper. Following, the floor was given to the knowledgeable and savant teacher Domingos Codega, official speaker, who discoursed about the history of his beautiful and dear land – Italy – for one hour and twenty minutes²¹.

The Italian elite was trying to immerse the city of Curitiba in the Italian culture and made evident the consolidation of the plans by the Italian government, including that of strengthening diplomatic relations between the two countries.

Every year, the date was celebrated with festivities filled with civic and artistic activities. In 1904, during one of the celebrations of Italian festivities promoted by Italian immigrants from downtown Curitiba, on September 20th, the presence of the students of *Scuola Dante Alighieri* was registered in addition to other ethnic events around downtown.

Parties organized by the Italian colony took place yesterday with extraordinary cheerfulness, to celebrate the most meaningful patriotic date for the children of beautiful Italy – the Confederation of the small peninsular states into a strong and homogenous national body. The official reception started the festive day at 11 o'clock at the Italian Consulate. Among the participants, who enjoyed a live band playing at the residence's gardens during the ceremony, were the consuls, many members of the Italian colony and students of the Dante Alighieri School, who were accompanied by teacher Miguel Grassani. [...] During the day, the Italian Consulate, the Grande Hotel, the event halls and Italian commercial establishments flew Italian flags²².

By having the schools represent the mutual association, the cultivation and propagation of *Italianita*, which began in the classroom, was complemented by the festivities.

Yesterday's glorious date marks the anniversary of the splendid day on which Dante's nation was unified. A proper and brilliant celebration took place in this capital, organized by the united and strong Italian colony that resides here. According to the program published herein in the last edition, the dawn of September 20th was received with a 21-gun salute. There was a reception at the residence of Mr. Consul Maximo Goffredo, and a parade through our main streets, which included the musical band Giuseppe Verdi and the students of the Dante Alighieri School. At 8pm, the Garibaldi association event hall hosted a large number of families, who were there to hear the distinguished teacher Francisco Feola perform a beautiful patriotic conference, which went along with the suggestive theme and was frequently interrupted by warm applause²³.

Between the maintenance of *Italianità* and the good relationship with the authorities of the state of Paraná, the Italian school of Curitiba sought to guarantee the teaching of the Italian language by adapting to the educational needs and demands imposed by the Brazilian government as much as possible.

²¹ «A República», 1901, p. 2.

²² «A República», 1904, p. 1.

²³ «A República», 1916, p. 2.

According to his report, School Inspector Eneas Marques dos Santos had attended the exams at the Italian school *Scuola Dante Alighieri* in November of 1910 and verified the existence of 55 students²⁴. Even though the only teacher mentioned in the documents is the Italian teacher Miguel Grassani, the participation in school exams proves that the teaching of the Portuguese language was somehow being done in the Italian school. This condition allowed for receiving subsidy from the government of Paraná in the year of 1911²⁵. Until then, only resources sent by the Italian government supported the school.

During this time, the state's Educational Regulations allowed for the opening of private schools directed by foreigners, but mentioned nothing about sending subsidies to foreign schools. Possibly, the financial help from the government of Paraná was achieved by requests made by the teacher, mediated by the very Italian families who sent their children to school there.

In 1916, the school counted with two Italian teachers: Miguel Grassani, who taught the boys, and teacher Brígida Feola, who taught the girls. According to statistical information included in the report sent by Dr. Eneas Marques dos Santos, State Secretary of Internal Affairs, Justice and Public Education to the President of the State on that year, the school had an enrollment of 120 students²⁶. As published in the newspaper on November 11th, 1916, *Società Dante Alighieri* performed the celebration of the September 20th's Italian civic date.

Today, at the kid's chic theater, there will be a great presentation to benefit the Italian school of this capital. For this purpose, a magnificent program was prepared in which the following acts will be performed, the first by an amateur group and the others by the wonderful students of the Italian school Dante Alighieri: "Quanda la patria chiama"; "Viva l'Italia", and a great variety show. This festival that celebrates the birthday of king of Italy Vittorio Emanuele III will begin at 7pm²⁷.

By briefly analyzing the calendar of Italian festivities celebrated by the associations, one can verify that the artistic and literary manifestations corresponded to a culture shared by the wealthy part of the population. In his travel journal titled «Il Brasile Meridionale», Domenico Bartolotti made a brief reference to the Italian elite of Curitiba. By affirming that only Italian intellectuals could reflect a good image of Italy, he emphasized the significant

²⁴ Paraná. Departamento Estadual de Arquivo Público. *Ofício*. 1910, p. 122.

²⁵ Report presented to Your Excellency Dr. Francisco Xavier da Silva, President of the State of Paraná, by Col. Luiz Antonio Xavier, Secretary of State of Internal Affairs, Justice and Public Education, on December 31st, 1910. Curitiba, Typ. d'República, 1911, p. 54.

²⁶ Report presented to Your Excellency Dr. Affonso Alves de Camargo, President of the State of Paraná, by Dr. Eneas Marques dos Santos, Secretary of State of Internal Affairs, Justice and Public Education, on December 31st, 1916. Curitiba, Typ. d'República, p. 244.

²⁷ «A República», 1916, p. 2.

difference between the Italian immigrants who were settled in the agricultural regions and those who lived downtown.

I nostri connazionali più ragguardevoli risiedono in maggioranza nella capitale, dove s'è formato un bel núcleo di intellettualità Italiana, com decisa influenza nell'ambiente nazionale. Quello Che s'è verificato in questo paese induce a qualche melanconica riflessione, poichè si dimostra ancora una volta come La sola emigrazione manuale non possa conferire prestigio ad una nazione. La nostra immigrazione in questo stato era costituita nei primi anni esclusivamente di coloni, che non avrebbero mai rappresentato un peso morale, pur migliorando La loro condizione e raggiungendo anche La ricchezza. E Il concetto sul nostro paese si sarebbe basato, come è avvenuto altrave, su questa emigrazione, ottima senza dubbio, ma povera e sufficientemente ignorante²⁸.

The celebrations gained strength when associations came together and with the participation of a very restrict group of individuals of Italian origin and wealth.

The united associations of Giuseppe Garibaldi, Dante Alighieri, Vittorio Emanuele III of Ahú, Vittorio Emmanuelle II of the capital and Circolo Italiano, invited us to watch the festivities that will take place on the 19th and 20th of the current month to celebrate the great date of September 20th, the 50th anniversary of the Italian Unification. These festivities, which promise a lot of splendor, run according to the well-organized program that will include: Sunday, 19th at 8:30pm, celebrating conference at the Garibaldi event hall, hosted by teacher Francisco Feola, and a great ball; Monday, 20th, 21-gun salute; at 8:30pm gala function at Guayra theater, with the performance of the popular comedy in three acts of Libero Pilotto, "Dall'ombra al sole", performed by an amateur group. At intermission there will be piano and singing performances. The Italian colony bursts with cheerfulness for the festivities planned²⁹.

It is noticeable that the civic festivities were composed of programs that included plays, balls and conferences about the Italian Unification. These conferences were usually led by the consuls or the teachers that worked in the schools, as quoted above.

According to the Report written by the School Inspector Heitor Borges de Macedo, in the year of 1923, *Scuola Regina Margherita* was directed by the Italian national Francisco Feola. Francisco Feola was also the secretary of *Regio Consolato Italiano* of Curitiba and director for the newspaper *Unione*, which, according to Bartolotti, was very efficient at promoting the *Italianità*³⁰. In that year, 68 students were enrolled, 28 of which were boys and 40 were girls. Among those, 30 were in first grade, 16 in second, 12 in third and 10 in the fourth grade³¹.

²⁸ Bortolotti, *Il Brasile Meridionale*, cit., p. 361.

²⁹ «A República», 1920, p. 1.

³⁰ Bortolotti, *Il Brasile Meridionale*, cit., p. 363.

³¹ Paraná. Departamento Estadual de Arquivo Público. *Ofício*. 1923, p. 98.

It was also noteworthy that the celebrations of *Italianità* were completed with a ball. Usually, the balls closed the program of civic celebrations or even other festivals promoted by the associations. In April of 1929, the newspaper *A República* reported on one of the artistic festivals promoted by *Circulo Italiano di Curitiba*. The ball marked the end of the performances:

Last Saturday, at the Società Dante Alighieri's event hall, Circulo Italiano hosted another one of their beloved festivals, with a program filled with magnificent music, singing and classical dance, in addition to a grand ball. The following ladies were part of such selective program that greatly pleased the large audience: Yolanda Fruet, Helena Colle, Leticia Colle, Zilia Quadri, Flora Prisco, Angelica Colle, Osminda Giampaoli, Maria Augusta Soares da Costa, Olenska Mikozevva, and the gentlemen: Affonso Fruet, Carlos Frederico Pernetta Venceslau Schvanzee and Antonio Mello. Also part of this artistic program was teacher Felice Clory, who played the piano accompaniment, and maestro Romualdo Suriani, whose baton directed an orchestra of 20 teachers. After several acts, which, as mentioned, were immensely appreciated by the audience with the warmest applause, the cheerful ball began and lasted until early dawn³².

Thus, the associations sought to marry the teaching of the Italian language and culture to the civic celebrations by means of artistic manifestations. The role of the mutual help associations, however, who aimed at building the Italian identity overseas, was not restricted to influencing the children. At the end of the 1930's, *Società Dante Alighieri* opened an Italian language and literature class at the *Universidade do Paraná*.

According to the newspaper «A República», in April of 1929 the class had a large number of participants and activities that were well connected to the ideals of spreading the Italian culture.

The Italian language class, created at the perfect time in our capital by the Dante Alighieri association, proceeds with regularity, always assisting a large number of students. Teacher Dr. Francisco Stobbia has shown such endless dedication, with beautiful lectures to two large classes that alternate on Mondays, Tuesdays, Wednesdays and Thursdays. On Fridays, as previously published, the distinguished royal consul of Italy, honorable Amadeo Mammela, hosts splendid conferences in the noble hall of the University, to which the students of both classes can attend, along with a large number of graduates, academicians and journalists, etc. Yesterday's conference focused on the "Beginnings of art in Italy". For a continuous hour, the savant speaker held the attention of the audience, precisely developing the details, evincing his extensive knowledge of the subject through each step of the extremely interesting speech. He spoke about Architecture, painting, music, citing examples, recalling names, describing monuments, characterizing styles, determining dates, everything in such admirable synthesis, which profoundly held the attention of all listeners³³.

In the 1930's, several educational laws prohibited the creation and, consequently, the operation of foreign schools in Paraná. Those that did not

³² «A República», 1929, p. 4.

³³ *Ibid.*, p. 1.

teach the Portuguese language, such as the majority of schools run by mutual help associations, were closed. Yet, the Italian associations did not stop fulfilling their important role in propagating *Italianità* in the state of Paraná. As a strategy, they linked the teaching of the Italian language and culture to the undergraduate course, as an addition to the intellectual development of the few individuals that were in the institution at that time.

2. *The teaching of the Italian language in an agricultural colony: associations with the purpose of building an identity*

Società Italiana di Mutuo Soccorso Cristoforo Colombo was created on October 1st, 1905. This association was located in the agricultural colony of Alfredo Chaves, 15 miles away from the city of Curitiba. According to one of its Statutes, the objective of this institution was to promote well-being, morality and education, and its assistance was available exclusively to those who were members. The statute, dated from the year 1909, stated that the association, besides education, had medical assistance as one of its main purposes. According to articles 11 and 85 of the statute³⁴, the members had the right to receive subsidy for health treatments in case of accident, impossibility of work or health treatments outside the former colony. For this reason, each member must contribute with an amount of 1000\$ réis monthly in order to be eligible to use these benefits.

The Italian school *Scuola Santo Antonio*, which was partly supported by the Italian government and partly by the members of the *Società di Mutuo Soccorso Cristoforo Colombo*, was characterized as a *Regia Scuola Italiana* – one of the types of schools of the *Scuole Italiane All'estero*.

The *Società Italiana Cristoforo Colombo* contributed to the propagation of *Italianità*, according to the Italian State, professing the same nationalist attributions that other Italian mutual-help associations did. Even though this association was established within an Italian agricultural colony, it is important to note that Italian immigrants that had a favorable financial situation motivated its creation. Among the founding members, it is important to note the participation of colonials that were involved in the industrial and business activities, such as, for example, the Italian industrialist Francisco Busato and the Italian businessman, Alpheu Puppi, owner of a dough factory and a store. Puppi maintained a friendly relationship with the Italian consuls in Curitiba, and had an Italian noble title, besides going on frequent trips to Italy. The close relationship that he maintained with Italy motivated him to offer the teaching

³⁴ Statuto Definitivo, 1909, cit., pp. 2-12.

of the Italian language to his children, assisting and mediating the entire process of organizing the Italian association in the colony and, consequently, the school.

The first information about the existence of this school dates of the year 1906 and appears in the chapter *Le Scuole Italiane*, by Carlo Parlagreco, in the book *Il Brasile e gli Italiani*. According to this document, the school had an enrollment of 74 students that year³⁵.

Although the statutes did not greatly guide the operations of an Italian school by that association, we know that the classes were taught exclusively in Italian, meeting one of the criteria of the *Scuole Italiane All'estero*. The network of Italian schools maintained abroad by the Italian government ordered that a *Régia Scuola Italiana* must operate similarly to those in Italy. They would receive the material from the Italian government, follow an official school program and the teacher must hold a title that was still regulated in Italy.

The teaching of the Italian language at *Scuola Santo Antonio* contributed to the propagation of *Italianità*. Among the books used by the teacher Giovanni Batista Lovato to teach the language, a book that combined reading and math stood out. Published as one, the first part of the book focused on teaching the Italian language. It was titled *Primo Grado di Letture al Fanciullo Italiano*, by Giulio Tarra. It included the following content: conversation in Italian, family correspondence, dramatic dialogues (tales), thoughts and poetry. The second part of the book was specific about math, and was divided into 20 lessons, under the title *Istruzione Ragionata sul Sistema Metrico Decimale ad uso delle scuole elementari e commerciali del Regno D'Italia*, by Niccolo M. Introna.

This was possibly not the only book used by the teacher. Others might have been delivered by the Italian Consulate, especially Italian History and Geography, since this was a school supported by the Italian government.

According to Salvetti, the *Scuole Italiane All'estero* must promote the teaching of the Italian language and spread the Italian culture, as is the liberal perspective of the Italian state:

The schools were mandated to provide a "liberal and strictly Italian education." The directive applied specially to Italian schools of religious missions abroad, which were noticeably hostile to the new liberal State because of a Roman matter that was still unresolved: if they intended to make use of government subsidy, they must accept programs, textbooks and inspection from the government³⁶.

On November 24th, 1910, teacher Giovanni Batista Lovato, also a member of the *Società Italiana di Mutuo Soccorso Christoforo Colombo*, reported the opening of a private Italian school in the «proximity of the village» with the purpose of requesting financial help to the government of Paraná.

³⁵ Parlagreco, *Le scuole Italiane*, cit., p. 800.

³⁶ Salvetti, *Le scuole Italiane all'estero*, cit., p. 537.

João Batista Lovato states that, since they maintain a private Italian school in the surroundings of Villa Colombo with an attendance of forty-two students, as made evident by the documents attached, we respectfully come to request that Your Excellency shall grant a monthly subsidy in the amount of sixty thousand réis, according to current law, with the commitment to teach twenty students at no charge³⁷.

The government's reply to the Italian teacher's request was negative, because the school did not teach the Portuguese language. One of the first educational legislations about mandatory teaching the vernacular language in private schools in Paraná was Law n. 365, of April 11th, 1900. This law outlined in article 20, the mandatory teaching of the national language as a requisite for private schools to obtain subsidy from the state, specially the foreign ones. The school maintained by *Società Italiana di Mutuo Soccorso Christoforo Colombo* did not meet such criteria, since it had amongst its main purposes the spread of *Italianità* by means of the exclusive teaching of the Italian language. Without financial help of the Brazilian government, the school continued its operations with financial help of the Italian government and of the few Italian families who sent their children to that school.

Final Considerations

The perspective of interpretation that seeks to understand the efforts of the mutual-help associations in the construction, propagation and perpetuation of the feeling of belonging to the Italian ethnicity is extremely historically relevant. Considering the amount of document sources about the matter, we recognize the limitations of this analysis, which sought to demonstrate how mutual-help associations, by means of their ethnic schools in Paraná/Brazil, acted in the propagation of *Italianità* by promoting the teaching of the Italian language and culture, and celebrating the Italian civic holidays.

By appealing to the formation of a national conscience by means of secularly teaching the Italian language and culture, the ethnic schools linked to mutual-help associations contributed greatly to the process of preservation and propagation of Italianicity.

It is also noteworthy that the associations analyzed here were planned and maintained by members of an Italian elite that had emigrated in the end of the 19th century, and that was composed of businessmen, industrialists, artists and scholars.

Despite the different tactics used by the mutual-help associations to Italianize the city of Curitiba and expand education as a tool to instill the feelings

³⁷ *Ibid.*, p. 25.

of ethnical belonging to the Italian nation, by the end of the 1930s – when mandatory nationalization was propagated – all those schools had been closed down.

A school subject serving the nation. Geography textbooks in Romania (1864- 1945)*

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ABSTRACT: My research aims to analyse geography textbooks of Romania in order to see the relationship between ideology, national identity and the content of textbooks. I will try to see how textbooks' design, language and images convey a political or cultural message. The period chose for analysis (1864-1945) is relevant due to its connections with the political project of building Romanian national state and constructing national identity. The geographic and ethnic structures of the state undergo radical changes in the period, changes reflected in the way textbooks are designed and in the political message they conveyed. Allied with history and politics, geography brought its contribution to the national identity building, constructing an exceptional place, "unique and authentic" to be inhabited by the nation, a historic and ancestral land – Romania.

EET-TEE KEYWORDS: Textbooks; Geography; Nationalization; Cultural Identity; Conceptual Imagery; Romania; XIX-XX Centuries.

Introduction

On a stretch of over 330.000 km², bask in a gentle and generous sun: Romania's plains, hills and mountains; rivers flow from the source to their mouth, for 2000 years there live here men of superior spirit, tougher in their needs, and smarter than all the other nations which have oppressed them

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and tried in vain, for centuries on end, to make them forget their nation and language¹.

Taken from a geography textbook, the fragment above speaks more about political ideology than it does about geography. It describes an exceptional nation faced by a hostile historical context, and situated in a unique geographical environment, which comprises of all types of landform.

In this article I will analyse how the territory is represented in Geography textbooks, focusing on the main elements that fuelled the national mythology (shape, position, landform), the residents (Romanians and others), history and economic development models. The working hypothesis is simple: geography textbooks have contributed to the political project that aimed to build the nation and a sense of national solidarity, creating certain social representations of territory and population in order to legitimise the two, but also with the purpose of making the nation better known to pupils, seen as future citizens.

As part of my methodology, I have used discourse analysis, deconstructing the textbooks' content to identify what is taken for granted, valorised or regarded as unimportant, and visual analysis in order to determine the ways in which visual material is employed². The corpus of texts included in the research comprises of 35 Romanian geography textbooks for secondary and high schools, written between 1864 and 1945. Unfortunately, it has been impossible to identify a comprehensive list of textbooks printed in the period under examination. It is important to notice that, while textbooks were written by secondary school teachers or by or university professors, they could not be printed and used in schools without formal approval from the Ministry of Education, and this could be obtained only if the textbooks were in line with the Education policy promoted by the state.

1. *Political context*

The research spans the period between 1864 and the Second World War. It has been a period of profound political changes, with dramatic consequences on Romania's status and territory, but also a period of economic, social and

¹ N. Cantuniar, *România pentru clasa IV secundară*, Craiova, Institutul de Arte Grafice SAMITCA, 1919, p. 5.

² J. Nicholls, *Methods in School Textbook Research*, available on: <<http://centres.exeter.ac.uk/historyresource/journal6/nichollsrev.pdf>>, (accessed: April 17, 2014); H. Bourdillon (ed.), *History and Social Studies. Methodologies of Textbooks Analysis. Report of the Educational Research Workshop in Braunschweig (Germany) 11-14 september 1990*, Amsterdam-Lisse, Swets & Zeitlinger B.V., 1992; F. Pingel, *UNESCO Guidebook on Textbook Research and Textbook Revision*, 2nd ed. revised and updated, Paris-Braunschweig, UNESCO-Georg Eckert Institute for International Textbook Research, 2010.

cultural transformation. The theme of national identity has been a constant concern for the political establishment over the course of this period, as a result of frequent territorial changes which led to the annexation of a population which for centuries had been subjected to foreign political regimes.

Romania's history is dominated by «the national question», a political project aiming to unite into a single state all territories inhabited by Romanians. This project has been brought to completion in two phases: 1859 and 1918. In 1859 two Romanian provinces, Wallachia and Moldavia were united to form a new state: the United Principalities (later named Romania). Politically, Romania was under the suzerainty of the Ottoman Empire until 1878. Then, after the Russo-Turkish war of 1877-78 and the Treaty of Berlin (1878), it gained not only independence, but also the province of Dobruja. Internally, the period after 1859 witnessed the creation of the Romanian state and the institutional architecture. At this time, there was a sustained drive to modernise society, in a bid to achieve cultural synchronization with the West.

In 1918, Romania gained other territories inhabited by Romanians: Transylvania, Bessarabia and Bukovina. The creation of Greater Romania became an accomplished goal. Romania's territory and population almost doubled, but the annexation of territories very different in terms of ethnicity, religion and culture posed a number of challenges to the Romanian elite. Integrating newcomers into the nation state would succeed with the help of a series of policy initiatives starting in the 1920s.

The 1930s experienced a weakening of the democratic regime. An increasingly authoritarian monarchy and ultra-nationalist, anti-Semitic far right movements came to dominate the political stage, as they did in many other European states. The year 1940 brought amid the turmoil of the incipient Second World War, the loss of various territories: south Dobruja was ceded to Bulgaria, Bukovina and north Bessarabia were given to USSR, and Transylvania to Hungary. Of these, only Transylvania was reunited with Romania after the end of the Second World War.

2. *National geographic mythology, as presented in textbooks*

A predestined geographical position. According to one of the theses of Romanian geographical mythology³, Romanian land has a number of qualities which individualize it and bestow upon Romanians an exceptional destiny. One such a quality came to be known as the «predestined geographical position»,

³ L. Boia, *Istorie și mit în conștiința românească*, București, Humanitas, 1997, pp. 148-150; M. Coman, *Spațiul românesc – interpretarea teleologică a geografiei istorice*, «Revista istorică», n. 1-4, 2006, p. 55.

Romania's allegedly perfect location on the globe: halfway between the Equator and the North Pole, in the middle of the temperate zone, in the heart of Europe, in the centre of the northern hemisphere where the civilized people live⁴. Many authors associate this position with various advantages, from climate to culture or economy. But most important are the political consequences. The geographical position gave a historical sense to Romanian people, turning it into the «bulwark» of Western Europe, the obstacle in the way of nomadic peoples heading towards the West. It sacrificed itself for the peace and welfare of Western Europe which in turn showed it a «special consideration»⁵.

Several authors also mention the negative aspects deriving from the geopolitical situation of Romania, located «in the most perilous part of Europe», straddling the path of the nomadic peoples as they made their way westwards, which explains «many of our minuses today»⁶, but even in their case, the final point of the argument is to highlight the exceptional nature of a people which endured so much along its history.

Natural borders. The border defines a political entity, shields it from enemies, protects it from potential invasions, and prevents the displacement of the Romanian element⁷. One author even assigns it a «spiritual character»⁸, a feature which emphasizes the idea of concentrating the population of the same ethnicity and ensuring cohesion among brothers.

Natural borders the Carpathians (though they cease to be a frontier after 1918), the Dniester, Tisa, Danube and the Black Sea are presented as constant landmarks in Romanian history regardless of the changes suffered by the territory of the country. The issue of natural borders has fuelled one of the theses of national geographical mythology, and, as such, permeates geography textbooks. The fascination with natural boundaries has at least two explanations. Firstly, it brings into discussion the idea of a predestined space which is much easier to describe if delimited by natural borders⁹. In this case, natural borders confirm a legitimate order and the morality of territorial claims; between the people and territory there is a perfect overlap. Imagination assigned various functions to landforms through imagination: they ensure cohesion between people of the same ethnicity, they protect from enemies, and they separate different nationalities and Romanians from their neighbours. A second explanation could be that natural borders can be much easier defended

⁴ I.V. Luca, *Geografia României pentru uzul clasei III-a secundară, normală și seminarii*, Botoșani, Ed. B. Saiddman, 1930, p. 3.

⁵ I.G. Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, ed. II, Iași, Ed. tipografiei H. Goldner, 1902, p. 4.

⁶ N. Ceașianu, *România pentru clasa IV gimnazii și licee comerciale*, ed. I, București, Cartea Românească, 1938, p. 5.

⁷ T. Biju, *Geografia României pentru clasa IV secundară și normală*, București, Cultura Românească, 1935, p. 10.

⁸ Luca, *Geografia României pentru uzul clasei III-a secundară, normală și seminarii*, cit., p. 8.

⁹ L. Boia, *Pentru o istorie a imaginării*, București, Humanitas, 1998, p. 203.

than the conventional ones, and in this respect the Carpathians, the Danube and the Black Sea are some of the safest landforms.

The shape. World War I has led to «the national ideal» and the union of territories inhabited by Romanians inside the borders of a single state. The Great Union was presented in textbooks as a historical goal which sought «Dacia's restoration», and was meant to give continuity and a sense of historical background to the new state, as well as to validate the political project. As a consequence of political events, the map of Romania has changed its shape and took on «the most pleasing geographical form». Something that was nothing more than a simple feature was quickly transformed into a quality and «put to use» by the authors of textbooks. All textbooks published after 1918 make a point of mentioning the switch from an irregular shape, which was difficult to defend – often compared to a «boot», or «saggy shoe» – to a more regular and more easily defensible one, resembling a circle. Beyond the aesthetic qualities, the new aspect predicted Romania's role «of the most important country in the central and especially southeastern part of our continent»¹⁰. Resorting to the simplified and stylized form of the borders, the authors provided a visual representation of Romania which had the advantage of being easily grasped, assimilated and reproduced by students. The metaphorical use of a geometric shape to suggest the country's personality profile is not specific only to Romania¹¹, but the perfection of the circle was a lucky coincidence used to emphasize once more the very special character of Romania. Metaphors are inherent when discussing the shape. Comparing the country to a round bread or to a medal served to provide visual representations of elements familiar to students. The choice of the two items is meant to evoke the country's ability to feed its population, an idea also found in the same textbooks, or the notions of merit and reward encouraged by the state, which structured the education system.

3. *A landform that determined the political destiny of the nation*

Textbook chapters dedicated to physical geography provide a description of Romanian landscape meant to facilitate knowledge of the national territory. But this goes beyond the description of landforms: textbooks also construct an image of the Romanian land, projecting onto it a series of qualities, cultural meanings and collective significances. Romanian landscape will become a source

¹⁰ V. Hilt, *România economică, pentru clasa VIII-a superioară de comerț*, 1st ed., București, Cultura Românească, 1938, p. 3.

¹¹ E. Weber, *L'Hexagon*, in P. Nora (ed.), *Les lieux de memoire*, Vol. II: *La Nation*, Paris, Gallimard, 1986, pp. 97-98.

of «collective identification»¹², a means of defining national identity intended to form a bond between student and territory, and to support the political project of national identity and nation building. Natural environment occupied an important place in definitions of national identity in other spaces, as well, and the phenomenon should be seen in the cultural and political context of that time¹³.

A number of qualities are assigned to Romanian land which gives it a unique character and renders it special among other countries. These qualities will feed the national geographic mythology and will continue to be a part of the mental image of Romania well beyond the period featured in this research. The beauty, variety, regularity and harmony of the various landforms are presented as elements which transform Romanian landscape into a special case in Europe and the world. Romanian landscape presents a «rare» symmetry which «is worthy of admiration»¹⁴. Its quality distinguishes it, offering an element of authenticity: «Romanian land is built symmetrically and more harmonious than any other land on the planet»¹⁵. Symmetry pleases the eye, but aesthetic satisfaction is of secondary importance, for it serves to unite the parts into a whole: «a geographic unit, a real whole which cannot be separated, decisively influencing the entire development process of Romanian people»¹⁶. The notion of «geographic unit» used in relation to the Romanian land makes its way in textbooks after the Great Union and is associated with a political dimension: political unity had to be supported by the unity of Romanian land, in order to give more weight and credibility to the process of nation building. Also, geography is used to transform the man-made act of the Union into a consequence of the divine act which created nature. Statements about Romania, stating that it is a whole «which cannot be separated» and which determines «a unifying existence for all Romanian people»¹⁷ abound in textbooks published after 1918. They are in line with the mechanism of national thinking and bring forward a symbolic link between nations and their natural environment, which historian O. Zimmer called a naturalization of the nation. «Resting upon a notion of geographical determinism, this perspective views the natural environment as

¹² O. Zimmer, E. Kaufmann, *In search of the authentic nation: landscape and national identity in Canada and Switzerland*, p. 1. Also available on: <<http://eprints.bbk.ac.uk/4214/1/4214.pdf>> (accessed: December 18, 2014).

¹³ See Zimmer, Kaufmann, *In search of the authentic nation: landscape and national identity in Canada and Switzerland*, cit.; Nora (ed.), *Les lieux de memoire*, cit.

¹⁴ G.M. Rașcu, *Geografia României pentru clasa IV secundară*, Chișinău, Tipografia Eparhială, 1924, p. 10.

¹⁵ S. Mehedinți, V. Mihăilescu, *România*, XIVth ed., București, Socec, 1937, p. 27.

¹⁶ Gh. C. Teodorescu, *Geografia României pentru clasa IV-a secundară*, Ist ed., Buzău, Ed. Autorului, 1945, p. 10.

¹⁷ N. Gheorghiu, I. Simionescu, *România pentru clasa IV-a*, IVth ed., București, Cartea Românească, 1937, p. 21.

doing more than expressing certain national virtues and characteristics»¹⁸. The author assigns nature with forces of moral and spiritual regeneration, necessary for the nation's existence.

Landforms have brought many benefits to Romanian people: the Carpathians and the Danube defended them from invaders, the Danube opened a road through mountains, placed them «in direct communication with the Occident»¹⁹ and tied Europe and Asia. Economic benefits obtained from them served both Romanians and foreigners: the plains were the granary of Romania and «the foreign countries» alike²⁰. The Carpathians and the mountain valleys have contributed to the preservation of Romanian national identity: «Hugging the mountains, our people held their unity; it isolated itself, maintaining its ancient cleanliness»²¹. The valleys were «natural fortresses which kept the seeds of national life; from them people started flooding the lowlands after barbarian hoards ceased to pass»²², and they have maintained the old Romanian tradition²³. For some authors, the symbiosis between the land and people is perfect. Not only does landform make possible the union of Romania, but it lends characteristics and virtues to its inhabitants:

Our rivers flow regularly, over in Bulgaria they only have undecided courses, twisted, as if in doubt to where they should flow, in some places they hide of daylight: who could say, then, that there is no connection between the people and the land it inhabits!²⁴

According to textbooks, physical geography cannot be separated from the people and their history. The description of landforms brings into discussion historical events which had occurred in those places, legends, myths and specific memories of ancestors. From one of the authors we learn that «there is no peak or valley, for which the people do not have a legend to tell. Princes and saints, almost all had an event connecting them to our Carpathian»²⁵. Through history and heroes, the land was invested with powerful emotional connotations, liable to strengthen student attachment to territory and the link between community and its landscape. It was, at the same time, an effective method by which students refreshed their knowledge of history. Landforms are more than a neutral framework for the development of historical events, they are said to

¹⁸ Zimmer, Kaufmann, *In search of the authentic nation: landscape and national identity in Canada and Switzerland*, cit., p. 6.

¹⁹ G.M. Murgoci, I. Popa Burcă, *România și țările locuite de români Manual de geografie pentru usul clasei IV secundare*, IInd ed., București, Institutul de Arte Grafice Carol Göbl, 1902, p. 110.

²⁰ Ceaușianu, *România pentru clasa IV gimnazii și licee comerciale*, cit. p. 55.

²¹ *Ibid.*, p. 18.

²² *Ibid.*, p. 52.

²³ Gheorghiu, Simionescu, *România pentru clasa IV-a*, cit., p. 61.

²⁴ Murgoci, Popa Burcă, *România și țările locuite de români*, IInd ed., cit. p. 133.

²⁵ Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, cit., pp. 10-11.

«provide the unique and indispensable setting for the events»²⁶. In this regard, mountains sheltered the residents and offered a number of advantages in battling the enemies. The valleys have maintained the circulation of the Romanian national element and made possible the establishment of medieval political units (Moldavia and Wallachia). Dragoș and Bogdan followed the course of the valleys when they arrived to found Moldavia, and it was also through the valleys that Negru Vodă came from Transylvania to found Wallachia.

4. *Rural Romania vs. urban Romania*

The predominantly²⁷ rural and agricultural character of Romania is present in all the analysed textbooks. Since the late nineteenth century, but especially in the interwar period, the cultural trends that extolled the virtues of the rural world and village life have dominated Romanian literary and social life. The dispute between supporters of the rural world and those of urban living seemed to end, at least on a discursive level, with the victory of the former. In this cultural context, dominated by a strong rhetoric against urban space, must be seen the discourse on rural and urban world in the human geography chapter.

Rural world was seen as the repository of public morality. The argument was framed in this way: marriages are more numerous in the rural areas, and there are fewer in the cities²⁸; moreover, illegitimate children are more numerous in the city²⁹. The morality of rural world is reflected in the higher birth rate in rural areas, which proves that «the rural population is more vigorous and leads a purer life than that in the cities»³⁰. The number of illegitimate marriages in rural areas is not a reflection of people's immorality, but is due to the state of poverty they face. Some authors accept a certain decline of the peasant's morality. However, this is due to the contamination of the village life with urban or foreign elements that led to «the alteration of the habits, following the introduction of railways and other forms which have contaminated the formerly pure household»³¹.

²⁶ A.D. Smith, *Myths and Memories of the Nation*, Oxford, Oxford University Press, 1999, p. 150.

²⁷ In 1859, 85% of the population lived in rural areas and in 1912 the percentage was 82. Cf. K. Hitchins, *România 1866-1947*, București, Humanitas, 1994, p. 164.

²⁸ C. Calmuschi, *Geografia României și a țărilor vecine locuite de români*, Ist ed., Ploesci, Stabilimentul Progresul, 1897, p. 141.

²⁹ *Ibid.*, p. 142.

³⁰ Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, cit., 98.

³¹ S. Mehedintși, *România pentru cursul secundar*, București, Viața românească, 1921, p. 206.

The village was said to offer better living conditions compared to the city. Some cited as evidence the higher mortality rate in the city³², but some authors were not shy about introducing some arguments without any scientific support, such as the fact that peasants «age more slowly than the urban residents»³³. Life in the village, used to suggest historical continuity, bears the mark of virtues inherited from ancestors: it is «patriarchal», «a simple, healthy life, as inherited by Romanians from their ancestors», «recalls the life of the old Dacians»³⁴. In the context of demographic fears (invasion by immigrants, the reduction of native elements) present both before and especially after 1918, the villages are seen, due to increased birth rate, as «a source of regeneration»³⁵ which ensures the existence of the Romanian people.

The depiction of the Romanian peasant as the bearer of spirituality, tradition and history is something that goes beyond textbooks. The village is the keeper of traditions, including an archetypal way of life which encompassed all values: «in villages, they have kept the costume, customs and the old way of living, so morality is still quite strong; here, family is stronger, life is chaste, and vices less numerous than in towns»³⁶. The many customs and traditions present only in rural areas make up a rich folk culture, an oral and imaginative one. However, the geographers bear a great burden, for they must reconcile aspirations and the label of ‘educated nation’ that they often use, with a social reality dominated by a massively illiterate rural society. Simion Mehedinți develops his own theory about the meaning of the term «cultured», one adapted to the Romanian case: «If a population is large and healthy; if work and economy flourish, and life is honest and pious, that people is called strong and very educated, even when only a few know how to read and write»³⁷.

The textbooks are competing to highlight the peasants’ love for work, their pleasure felt out in the fields. Nothing diminishes their enthusiasm to work their land, not even a hot day, at the end of which: «they return to their homes in the evening singing and joking»³⁸. Some authors state that they only approached the topic of work in order to dismantle some accusations unjustly brought against the peasants. I. Tufescu rejects as slander accusations that the peasant is lazy, careless and fond of alcohol, which some said were the causes for his miserable life. «The laziness of our peasant is pure slander, concocted by speculators who live from the sweat of his brow»³⁹. Moreover, the argument

³² Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit., p. 142.

³³ *Ibid.*, p. 149.

³⁴ Hilt, *România economică, pentru clasa VIII-a superioară de comerț*, cit., p. 78.

³⁵ Gheorghiu, Simionescu, *România pentru clasa IV-a*, cit., p. 112.

³⁶ Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, cit., p. 103.

³⁷ Mehedinți, *România pentru cursul secundar*, cit., p. 205.

³⁸ Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit., p. 147.

³⁹ Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, cit., p. 103.

is made that the number of days worked by Romanian peasants is greater than that of the peasants in Western Europe. Another author, endowed with more critical thinking, admits that the peasant is working hard, but, he notes that «his work does not follow the order of civilized countries, where the man works all year round»⁴⁰. Some other authors blame the so-called laziness on «political and economic circumstances of the past, for peasants have worked and produced wealth for others»⁴¹.

At a glance, it would seem there are certain topics that are presented accurately and without distortions, such as the appalling state of healthcare in rural areas. This could not be denied, nor presented in a better light, for campaigns from physicians and other social-professional groups depicted a reality that could not be challenged too easily: many of the conditions in rural world were due, *inter alia*, to poor health services. Nevertheless, textbook authors present only half of the truth: they admit that bad healthcare is a constant in rural world, but conclude that it does not affect the peasant's health, for climate, an «environment» and genetic background have a positive impact on it. Only one author attributes to poor sanitation (among other factors), the many diseases and even degeneration of the peasant: «the peasant's size diminishes every year, and bodily weakness increases»⁴².

Village descriptions are replete with metaphors and figures of speech in an attempt to suggest the idyllic atmosphere which surrounds it: «a mysterious and sweet silence, interrupted only by a whistle, a song or a bark, our villages have a pleasant and attractive appearance»⁴³. The negative elements affecting the village are blamed on political authority – bad roads, poor sanitation, and lack of public services – not on the rural community itself.

The city is emerging in contrast with the village. If the latter has a «millenary history», the former starts on lower positions because of its recent history. One myth, which enjoyed a long career in historiography argued that urban growth especially that of large cities generates violence and crime⁴⁴. This myth is not absent from geography textbooks. The city is painted in bleak terms, causing fear: human agglomerations degrade morals and health, alienate, prompt to suicide, and generate social problems. «Misunderstandings and family misfortunes, incurable diseases and pellagra, love [sic], a hectic life [...] misery, drunkenness and mental issues»⁴⁵ are identified as social problems specific for this type of settlement. Radical conclusions of authors deemed the city as an

⁴⁰ Mehedinți, *România pentru cursul secundar*, cit., p. 206.

⁴¹ Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, cit., p. 103.

⁴² *Ibid.*, p. 106.

⁴³ Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit., p. 159.

⁴⁴ E.A. Johnson, *Urbanization and Crime, Germany 1871-1914*, New York, Cambridge University Press, 1995, p. 158.

⁴⁵ Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit., p. 144.

environment less propitious to life (and argued that mortality rates exceeded those of rural areas). The presence in large number of foreigners, a leitmotiv of all the textbooks, fuelled the discourse on immorality and the dangers of urban world. Cities multiplied with the arrival of villagers and foreigners: «the latter have invaded from elsewhere, finding here hospitality, safety and the possibility to earn a living easily and abundantly»⁴⁶. The description of the city portrait in geography textbooks overlaps with the one circulated by writers, physicians, social reformers, and teachers, indicating that themes and clichés of anti-urban rhetoric so present in Romanian society were being liberally borrowed.

Certain merits are recognized to the city, ironically, by those who advocated the primacy of rural world: living was said to be active and intelligent, easy and comfortable, parties and opportunities for entertainment abounded⁴⁷. The urban world's accelerated pace has left its mark on some fields such as trade and industry, but holds a less pleasant reverse «a life full of struggle»⁴⁸. Perhaps the most notable contribution recognized to cities is that they made possible the alignment of the Romanian society to the values embraced by the western world, an arduous endeavour of the authorities and the elite. Following Western models, the city is open to ambitious ideas. «The townspeople have adopted the Western civilization along with clothes, the way of living and good or bad habits of Westerners, so they almost do not differ in any way from them»⁴⁹.

The urban planning process and endowment with public institutions, transformations known by the urban world starting with the second half of the nineteenth century and which led to the replacement of an oriental appearance with a western one, are mentioned in textbooks. The slow pace of modernization of provincial towns in comparison with the capital displeases some authors who deplore the absence of certain utilities, like sewage, running water, the lack of public buildings.

5. *An agricultural or industrial country?*

Rural-urban duality finds an echo in the two divergent economic development models: one based on agriculture, the other on industry. Agriculture is presented as the main occupation of the inhabitants. Historical evidence for the cultivation of wheat and animal husbandry, presented in some textbooks is used to justify the continuity of historical occupations and perpetuate the image of an agricultural Romania. The primacy of this branch of the economy is supported

⁴⁶ Gheorghiu, Simionescu, *România pentru clasa IV-a*, cit., p. 114.

⁴⁷ Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit., p. 161.

⁴⁸ Hilt, *România economică, pentru clasa VIII-a superioară de comerț*, cit., p. 78.

⁴⁹ Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, cit., p. 103.

by some real elements (such as the fact that it generates more income than industry, at least at certain times), but also by false arguments: e.g. Romania is one of the world's greatest granaries⁵⁰, or agriculture is a safer occupation in comparison to industry⁵¹. In the didactic literature of the 1930s, one may notice a change of perspective with regard to industry, which starts to be associated with development and progress. Romania's industrial achievements start being mentioned in textbooks, but in the absence of an industrial tradition and some significant results, they are reduced to crafts and small businesses. The authors explain the backwardness of industry and agriculture by the tumultuous history or the uncertainty of times, not by the human factor. In many textbooks, the present economic situation becomes secondary, references to it being eclipsed by those on the future, by the ambitious projects anticipated by the authors, an attempt to move the reader's attention from a not very satisfying present to a promising future to which students are expected to contribute.

Regardless of the economic options presented, textbooks agree on one thing: Romania possesses abundant resources, being a country «endowed by Fortune»⁵². The country's riches have often fuelled exaggerations and untruths and have offered the opportunity to stress again the exceptional character of the nation: «a land of plenty, sought by the powers trying to get their hands on it, which fought over it»⁵³. The soil is productive, the fame of its fertility has spread abroad, and one of the authors is recalling the intentions of Britons to purchase Romanian soil⁵⁴. The subsoil also abounds in riches, according to most authors, but their limited enumeration of oil, coal, mineral waters and construction materials does not support the claimed abundance. It's the union with Transylvania (1918) whose subsoil had more valuable minerals (such as iron, gold, silver, zinc) which transforms these claims into reality, offering a more solid footing for the eulogistic discourse on Romanian subsoil.

Autarchy, reducing the economic dependence on foreign states is the ideal which Romania is admonished to follow after 1918, and the discourse regarding the richness gives the illusion that this would be possible without too many sacrifices from the people. This is joined by an increasingly statist vision which ranges from economic interventionism to more radical solutions such as the nationalization of industry.

⁵⁰ Hilt, *România economică, pentru clasa VIII-a superioară de comerț*, cit., p. 99.

⁵¹ Ceaușianu, *România pentru clasa IV gimnazii și licee comerciale*, cit., p. 118.

⁵² Biju, *Geografia României pentru clasa IV secundară și normală*, cit., p. 131.

⁵³ Gheorghiu, Simionescu, *România pentru clasa IV-a*, cit., p. 21.

⁵⁴ Luca, *Geografia României pentru uzul clasei III-a secundară, normală și seminarii*, cit., p. 154.

6. *The portrait of the Romanian*

After the territory, the theme of inhabitants – Romanian citizens or minorities (before World War I, minorities in Romania enjoyed no political rights) – occupies the most important place in textbooks. The student must know the people who dwell on the territory of which he is a part, must know their characteristics, and, if possible, to acquire those traits going beyond the individual sphere and becoming identity matrices. The portrait of Romanians depicted in geography textbooks lends them exceptional features, overlooks deficiencies and shortcomings, highlights the status of the Romanian among other nations and suggests its superiority: «His open and sharp mind, his ease in acquiring any skill, the power of labour and economy, a deeply hospitable, religious and just spirit are all special qualities and prove our superiority even over the educated and civilized element among us (the Germans)»⁵⁵. In many textbooks, the Romanian is synonymous with the Romanian peasant. After all, rural life and the peasant had become the defining elements of Romanian national identity. This has been fuelled by the most popular theory of the time, which stated that the true Romanian population lived in villages, not in cities where the national character was altered by minorities, corroborated with the fact that over 80% of the population lived in rural areas.

Most authors opt for the same traits in the characterization of the Romanian/peasant pointing to common imaginary and stereotypes. The portrait is emerging as: very hospitable, tolerant, very patient, cheerful, kind and affable, honest, gentle, skilled, religious, forgiving, respectable, smart, intelligent, lively, hardworking, diligent, brave and «death defiant»⁵⁶, showing wit and «love of variety»⁵⁷.

Some negative elements discreetly slip into the portrait, but with minimal effects on the exceptional character: violent when losing their patience, talkative among friends, suspicious of strangers, getting enthusiastic really quickly, but also dejected with equal speed, taking hasty decisions⁵⁸, illiteracy. The bad habits on which there is no doubt, are written off as irrelevant: «Drunkenness, which is widespread among the peasants, must be considered more like a bad habit, than an act of immorality»⁵⁹. Alcoholism has been identified by the state and social reformers as one of the problems faced by the rural world, therefore there was no doubt about the existence, extent and negative consequences of this affliction. However, the authors are quick to point out the non-permanent nature of this custom: «when they have what to drink, they do, when they do not

⁵⁵ Biju, *Geografia României pentru clasa IV secundară și normală*, cit., p. 122.

⁵⁶ Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit., p. 167.

⁵⁷ *Ibid.*, p. 163.

⁵⁸ Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, cit., p. 102.

⁵⁹ Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit. p. 166.

have, they abstain»⁶⁰. A quantitative argument is also invoked: the much lower number of drunkards in comparison to «the barbarian Russia and the civilized England»⁶¹. Although vague, the argument was likely to reassure accusers and show that this phenomenon is not exclusively Romanian, but rather generally human, and is not related to the economic and cultural development of a nation since it can be found in Russia and England alike.

The historic heritage of certain qualities (intelligence, a characteristic of the Latin race) connects the ancestors and the Romanian people, and places a number of responsibilities and expectations on the fortunate heirs. The complex of not being a part of the great culture and the cultural gap separating Romanians from the West is compensated through the ability to capitalize on the contributions made by older civilisations through talent, skill and intelligence, rendering them «capable to assimilate all ideas and knowledge of old civilizations, to formulate new ideas and principles, to make discoveries in sciences and inventions in mechanics. In truth, there is no human science or art in which Romanians do not excel as soon as they start studying them»⁶².

The emphasis on the virtues and special features of Romanians is not an expression of mere desire for prominence, but represents a more sweeping political statement, with consequences on the historical and the political destiny of the people. «These qualities have maintained the ethnic unity of the Romanian people. The sharp judgement and the working dexterity have strengthened it»⁶³, stated a 1930 textbook.

7. *The others*

Minorities are the subject of a special chapter in the geography textbooks included in the present study⁶⁴. Geopolitical changes are reflected in the subject; after the Great Union, the number and the ethnic composition of minorities is dramatically changed. The transition of provinces from one rule to another has consequences on the population status going from majority to minority (Hungarians, Russians) and vice versa (Romanians). But the new provinces

⁶⁰ Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, cit., p. 103.

⁶¹ *Ibid.*, p. 104.

⁶² *Ibid.*, p. 101.

⁶³ Luca, *Geografia României pentru uzul clasei III-a secundară, normală și seminarii*, cit., p. 129.

⁶⁴ A similar discourse can be found in Mirela Luminița Murgescu, *Între „bunul creștin” și „bravul român” Rolul școlii primare în construirea identității naționale românești (1831-1878)*, Iași, Ed. A'92, 1999.

– Transylvania, Bukovina and Bessarabia – are ethnically diverse, presenting themselves as a mosaic of people.

The description of minorities is not only designed to provide the student with a portrait of the other, but it showcases their own national identity by building dichotomies. The chapters have a common structure based on information regarding numbers, geographical spread, the moment when minorities have settled in Romania, information on their occupations. Their analysis suggests common stereotypes and political concepts for the authors and the political authorities which approve the textbooks. The information presented and the structure of the chapters dedicated to minorities is similar in several textbooks and this leads us to consider a possible influence on the authors.

From the list of minorities, three stand out invariably by negative portrayal: Jews, Hungarians and Ruthenians. The picture conveyed by textbooks overlaps on that shared by most of the society. The anti-Semitism brings into discussion the degeneration of the nation, a favourite topic for the political power and various socio-professional groups in the late nineteenth century. The danger of being assimilated by the Hebrews, the only important minority whose population growth has been much overrated, fuelled the fears of Romanians towards this minority. Success in business and cultural differences are other possible explanations (though not the only ones) for the antipathy against Jews. The textbooks depict the Hebrews as living in the cities, especially in Moldavia, and as very good traders. The description of this ethnic minority insists on cultural and religious differences and on economic supremacy which they had secured from commercial activities and crafts: «they hold in their hands most of the country's trade and industry»⁶⁵. The elements which individualize them are those that maintain the distance between them and Romanians. «Through their religion, through their exclusive mode, perhaps through some operations which followed great gains...» they became the subject of many jokes that put them in a bad light and made them «insufferable» for Romanians⁶⁶. C. Calmuschi mentions the younger generation of Hebrews which, while enjoying the protection of Romanian institutions and living together with Romanians start being integrated into the nation state: «the relations between the two ethnicities began to strengthen, sympathies grow and there remains no doubt that if not an assimilation, at least a lasting friendship will be established between the future generations of these two nationalities»⁶⁷.

Among textbook authors, I. Tufescu is the most xenophobic in assessments of minorities and most aggressive against Hebrews: «When they came to this country, they were what their recent arrived brothers are, that is: hunchbacked people, with red complexion and full of freckles, suffering from eye diseases

⁶⁵ Raşcu, *Geografia României pentru clasa IV secundară*, cit., p. 90.

⁶⁶ Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit., p. 132.

⁶⁷ *Ibid.*, pp. 132-133.

and so on; in other words, they were the most ugly and dirty people in Eastern Europe»⁶⁸. According to the same author, the number of Jews settled in Romania exceeded that of the Hebrews settled in Western Europe⁶⁹; on the same level were also Austro-Hungary and West Russia. Tufescu's attitude may have been caused by the fact that in Iassy, the city where the author lived, the population of Hebrews was more numerous than in other cities of the country, which prompted some to see a threat in this minority. As a result, the anti-Semitic discourse was stronger in Iassy, the city which gave far-right movements in Romania most of their leaders.

The discourse about Hungarians and Ruthenians must be linked to the national problem and the formation of the Romanian state, but also the behaviour they had towards Romanians when the latter had been a minority. Hungarians are painted in the darkest possible colours. After the end of the wars against the Turks, they are presented as «the hereditary enemy»⁷⁰. Depicted as a threat to the very existence of the Romanian nation, they are accused of the denationalization of Romanians. As for the Hungarians from Moldavia, the references have a common feature: their assimilation by Romanians. The Hungarians share is often bundled with Ruthenians, as they too are accused by textbooks for their alleged mission of denationalising Romanians.

German minorities, Saxons and Swabians are portrayed, without exception, in a positive light: peaceful, «serious people»⁷¹, «people of discipline and, today, good Romanian citizens»⁷². They represent due to their hard work, honour and culture, an element of order and progress in the Romanian state⁷³. Their occupations include «agriculture, trade and all kinds of crafts»⁷⁴, and over time «they boosted industrial life in Transylvania»⁷⁵. Probably, the high regard in which Swabians were held influenced Simion Mehedinți to distort and misinterpret their arrival on the territory of the future Romania, for he mentions that they «came as guests»⁷⁶. Villages populated by German ethnics have good looking houses and well cared for households, being «a model of arrangement, good condition and hygiene»⁷⁷ for authorities and common people alike.

Bulgarians are mentioned through their occupations: agriculture, baking and gardening. Having the same religion as Romanians, they were assimilated

⁶⁸ Tufescu, *Curs elementar de geografie. România și țările locuite de români, pentru clasa IV secundară*, cit., p. 108.

⁶⁹ *Ibid.*, p. 107.

⁷⁰ Boia, *Istorie și mit în conștiința românească*, cit., p. 180.

⁷¹ Mehedinți, *România pentru cursul secundar*, cit., p. 204.

⁷² M. David, P.N. Mirodescu, *România pentru clasa IV secundară*, București, Naționala-Ciornei, 1935, p. 196.

⁷³ Biju, *Geografia României pentru clasa IV secundară și normală*, cit., p. 119.

⁷⁴ *Ibid.*

⁷⁵ David, Mirodescu, *România pentru clasa IV secundară*, cit., p. 196.

⁷⁶ Mehedinți, *România pentru cursul secundar*, cit., p. 203.

⁷⁷ David, Mirodescu, *România pentru clasa IV secundară*, cit., p. 196.

in time by the latter. Quiet, hardworking and beautiful people, with dark hair and aquiline nose, «a group liked by Romanians»⁷⁸, the Armenians are known for their talent for trade, being more and more assimilated. Greeks, too, are characterised mainly by the commercial activities practiced at the mouth of Danube, and through their interest in renting agricultural land. C. Calmuschi is the only author to draw them a slightly negative portrait: «cunning, thrifty, very skilled in trade business, almost all made considerable fortunes; with a great solidarity between them and an ardent patriotism, they have never forgotten their motherland»⁷⁹.

Turks and Tatars, «our old enemies», seem to be a closed chapter in Romanian history: «they left only memories»⁸⁰. In the interwar period, they enjoy a positive image, as the recollection of their invasions became increasingly blurred: good Romanian citizens, honest, discreet, they live a humble and peaceful life⁸¹.

Other minorities, such as Serbs, Slovaks, Poles and French are mentioned all through the activities they carry out or are simply listed as minorities present in Romania. Italians alone enjoy the sympathy of an author who presents them as being «modest, hard-working, much liked by Romanians»⁸².

Roma are mentioned as being present everywhere in Europe. Their economic and legal status is mentioned, in many cases, as a possible explanation for their backwardness. A certain primitivism is associated with them: poor, naked, «but happy in their state»⁸³, cunning, ruthless, illiterate, they were slaves. Considered to be inferior, they are the subject of numerous jokes, but their interest and talent for music is recognized, many of them being «great artists»⁸⁴. They practice crafts, like chimney sweeping and farriery, but they work the land, too, and are good at domestic chores. Like other minorities, they are portrayed as being «almost Romanians», with some authors showing a certain feeling of sympathy, a Romantic humanitarian and civilizing intention⁸⁵. Their negative traits would be due, in the authors' opinion, to their state of backwardness, resulted from a hostile political and legal context (having been slaves for a long time). In the case of minorities that textbook authors find agreeable, the negative references are not recurring in systematic fashion, but extremely disparate, which means that we are dealing with the author's personal stereotypes or stories that have supported the statement, and not a generalized image in society, as was the case with ill-favoured minorities.

⁷⁸ Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit., p. 133.

⁷⁹ *Ibid.*, p. 135.

⁸⁰ Ceaușianu, *România pentru clasa IV gimnazii și licee comerciale*, cit., p. 114.

⁸¹ Biju, *Geografia României pentru clasa IV secundară și normală*, cit., p. 121.

⁸² Calmuschi, *Geografia României și a țărilor vecine locuite de români*, cit., p. 136.

⁸³ M.V. Cordescu, *Geografia României și a țărilor locuite de români pentru clasa IV secundară: licee, școli normale, seminare și speciale*, București, Cartea Românească, 1920, p. 109.

⁸⁴ *Ibid.*

⁸⁵ Boia, *Istorie și mit în conștiința românească*, cit., p. 200.

The textbooks emphasize the tolerance shown by Romanians towards minorities, and state that foreigners are interested in Romanian lands particularly due to this trait: «the oppressed have found refuge with us» and they live their lives quietly «thanks to the sympathetic nature of Romanians which are guided by the adage: each one with his own law»⁸⁶. A textbook from 1945 even brings into question the political rights enjoyed by minorities similar to those enjoyed by Romanians, this being a peak of Romanian people's tolerance. With the exception of I. Tufescu's textbook which is characterized by xenophobic discourse regardless of the minority, other textbooks direct the negative opinions towards the three offending minorities: Hebrew, Hungarians and Ruthenians.

8. *History, as narrated by geographers*

Invariably, the chapters on political geography contain a brief history of the formation of the Romanian people and state. The historical events that authors dwell upon are carefully selected and presented in a positive light, in order to highlight the qualities of the Romanian people, but also the unfavourable political situation which seems to have been the norm throughout Romanian history.

The historical perspective begins with the Dacians, although the traces of settlements left behind by older civilisations are sometimes mentioned. Their portrait is consistently described in a very positive light: they are said to have been brave, diligent, sedentary, possessing knowledge of metal mining, experienced ploughmen, traders, founders of fortified citadels, of villages and cities⁸⁷. Their kingdom and their riches draw the attention of the Romans, who conquered them. The colonization, graphically presented as «the Roman graft» on the Dacian strain⁸⁸ does not destroy the native population: on the contrary, the province knows a boost and an unprecedented development. In a political context marked by territorial claims, the Dacian continuity was an important argument. The perpetuation of the Dacian element is demonstrated by the authors through the «language and our traditional costume»⁸⁹ which persisted until the time of the writing of the textbooks, or through the persistence of the character: «Romanians of today have preserved almost intact the nature of their ancestors»⁹⁰.

⁸⁶ Teodorescu, *Geografia României pentru clasa IV-a secundară*, cit., p. 93.

⁸⁷ Mehedinți, *România pentru cursul secundar*, cit., p. 186.

⁸⁸ *Ibid.*, p. 187.

⁸⁹ Calmuschi, *Geografia României și a țărilor vecine locuite de români*, p. 128.

⁹⁰ G.T. Buzoianu, *Geografia României și a țărilor vecine pentru clasa IV secundară*, VIIIth ed., București, Tipografia Toma Basilescu, 1900, p. 57.

The medieval period is also characterized by an epic-heroic vision dominated by «the bravery of our forefathers»⁹¹, «almost always conquerors and never conquered»⁹². The Turks were the greatest threat both for Romanians and for the Christian Europe. Nevertheless, «we have never suffered the shame of a permanent occupation»⁹³. Romanian-Turkish relations have oscillated between wars concluding with victories and good neighbourly relations: «The rulers have signed, at various times, treaties or capitulations of mutual aid and good relations, with the Turkish sultans, but through which the country's autonomy and sovereignty remained untouched»⁹⁴.

The history is described as a continuous string of battles waged «either against the peoples who were invading Europe, or against the Turks who constantly tried to reach the West. And if the Turks never conquered the whole Europe, this is only due to the bravery of Romanians, which was their most serious obstacle»⁹⁵. This presentation of a troubled history and of the unfavourable political context that hindered the aspirations of Romanians intended to stir a state of empathy from students: «we cannot remain cold in front of the trouble and struggle suffered by this noble people and beautiful land, in the course of time, and, we are pained to ask the cause of this»⁹⁶. The cause would be «the position and lie of the land, which determined the course of the Romanian nation's history»⁹⁷.

The contemporary political context influenced the authors in selecting events and presenting them. In the chapter dealing with national history from a textbook written shortly after the Great Union (1920), Mihail V. Cordescu puts particular emphasis on the unionist episodes: Michael the Brave and the first union of Romanian principalities (in the beginning of the seventeenth century), the union of the Principalities from 1859, the creation of Greater Romania. The War of Independence (1877-1878) is also mentioned, with particular reference to its territorial consequences (the annexation of Dobruja).

9. *The homeland in pictures*

The discursive element is complemented by the visual one. Textbooks from 1870s-1880s do not comprise of any visual material, most likely due to financial

⁹¹ Gh. Mihăilescu, *Geografia României*, Galați, Tipografia Română, 1878, p. 28.

⁹² *Ibid.*, p. 29.

⁹³ Rașcu, *Geografia României pentru clasa IV secundară*, cit., p. 93.

⁹⁴ Mihăilescu, *Geografia României*, cit., p. 29.

⁹⁵ G.M. Murgoci, I. Popa Burcă, *România și țările locuite de români Manual de geografie pentru usul clasei IV secundare*, IIIrd ed., București, Inst. de Arte Grafice Carol Göbl, 1905, p. 130.

⁹⁶ Murgoci, Popa Burcă, *România și țările locuite de români*, IInd ed., cit., p. 166.

⁹⁷ *Ibid.*

reasons; the authorities intend to maintain textbooks at the lowest possible price. At the end of the 1890s, images make their way in textbooks, but it is only in the interwar period that they become pervasive.

The images support the text in an attempt to facilitate the accumulation of knowledge and to promote attachment towards the nation, to strengthen national identity both among the inhabitants of the Old Kingdom and among those hailing from the newly annexed provinces. They propose a specific representation of the nation and promote a general view of the country⁹⁸, elements considered to be representative for Romania. The visual material enables knowing and visiting the homeland by students, but its image, built through a careful and thorough selection process, gives the impression of an exceptional and exemplary country. The photos bring forward the remarkable beauty of landscapes – the selected examples distinguish themselves through majesty – and recompose an idyllic rural world, carefully constructed. The pictures from cities and industrial sites are monumental and impress the viewer, inducing the idea of progress.

A typology of images, according to their topic, revealed the following categories: landforms, rural world, urban world, industry, agricultural activities, bridges, Romanians abroad, flora and fauna, Romanian monarchy. The landforms are, by far, the best represented, closely followed by those depicting the rural world. The rural sphere is portrayed through various elements: costumes, vernacular architecture, folk art, images from villages and customs. The predominantly rural character of Romania, a pastoral discourse that emphasized the values of the rural world and that this would be a repository of moral and authentic life could provide some explanations for the large number of images referencing the rural world. Vignettes representing geometric patterns used in folk art adorn the textbooks, again in praise of rural values. The images from Romanian cities, depicting the modernization process they had undergone, are on the third place in our list, followed by pictures of national monuments. In the latter case, the preference goes to churches and monasteries, followed by a few monuments dating from antiquity (Tabula Traiana, Dacian fortresses); in fact, those are the only Romanian monuments, excluding the more recent ones from the nineteenth and twentieth century. The industrial theme (Reșița factories, oil wells) ranks high in the authors' preferences, especially during the 1930s. The material and intellectual efforts, the technological progress behind industrial achievements have fuelled a sense of pride among some of the authors and in much of society. The same mechanisms were behind the selection of images of modern buildings, such as the bridge at Cernavodă. A symbol of technological progress, one of the aspirations nurtured by the Romanian elite in the second half of the nineteenth century, the image of the Cernavodă bridge made its way into the textbooks,

⁹⁸ K.D. Kennedy, *Visual Representation and National Identity in the Elementary Schoolbooks of Imperial Germany*, «Paedagogica Historica», n. 1, 2000, p. 234.

shortly after its construction, and it became a frequent choice (in 13 textbooks), even becoming the cover for one of these. Romanians from abroad and national minorities are other categories that benefit from visual representations, but no conclusive connection could be found between the number or the subject of the images, and the political discourse or context.

Conclusions

The textbooks provide the reader with many and varied representations of Romania, visual or narrative, geometric or allegoric. They were designed to familiarize the student with a complex image of Romania, and to facilitate knowledge about the country. Allied with history and politics, geography made its contribution to the national identity building, constructing an exceptional place, «unique and authentic» to be inhabited by the nation, a historic and ancestral land – Romania. It generated feelings of attachment, cohesion and solidarity with the nation and the country's territory, strong enough to inspire students lay down their lives in service of the nation, in the hour of need.

Textbooks have perpetuated the image of a people with an exceptional nature, placed in a geographical location predestined to support the political projects of the moment. A platform for the national geographic discourse, the didactic literature has developed an entire geographical mythology, whose main thesis was that the space inhabited by Romanians was truly unique in character, eminently endowed with all the ingredients necessary for building a nation.

Relying on simplified images, adapted to the age of pupils and students, the textbooks express assertions, ideas and geographical theses. They rarely appeal to scientific arguments in order to prove or support the national geographical discourse. Often, contradictory ideas appear in textbooks, but they serve the same political aims, namely to engender a sense of solidarity with the nation and to create a national mythology for integrative purposes.

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School architecture as a way of promotion of Soviet identity in the 1930s' Stalinist Russia*

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ABSTRACT: During the Soviet era, schools functioned as a special public locus for the promotion of social and political identity, particularly among youth. Throughout the late 1920s and early 1930s, proponents of both 'urbanist' and 'deurbanist' architectural trends proposed imaginative school designs in an effort to advance the social utopia under construction in the Soviet Union. These plans never came to fruition, though, and were replaced in the mid-1930s with a standardized school building. This new Soviet school had strict regulations about interior and exterior décor, consistent with its assigned tasks of disseminating political ideology and organizing the social life of the surrounding community. Drawing on previously untapped sources, including Soviet architecture and youth journals from the 1930s, this article investigates the evolving role of the Soviet school, as well as its architectural design, in promoting and establishing state authority among both children and adults.

EET-TEE KEYWORDS: School Architecture; Space Arrangement; Cultural Identity; Political Propaganda; USSR (Union of Soviet Socialist Republics); XX Century.

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It would be worthwhile to write an entire history of different spaces (which at the same time would be a history of various forms of power), moving from large geopolitical strategies to the smallest tactics of settlement; a history of the architecture of institutions, such as the classroom or hospital, from the perspective of their economic and political differentiation.

(Michel Foucault, *L'oeil du pouvoir*, 1977)

Introduction

During the 1930s, Soviet authorities introduced a range of policies that aimed at, and ultimately succeeded in, creating new kinds of spaces for children. In manipulating a range of symbols, ideals, heroes, and myths that children would recognize, these new spaces strove to promote a particular image of Soviet reality among the youngest members of society. Fundamental changes to the structure, content, size, and location of these spaces throughout the second half of the 1930s reflected major changes in the lives of children, denoting the transformation of their relationship with the state, as well as the state's own evolving sense of self-representation. Over time, these concepts spread to the rest of society as well.

In engaging the concept of children's space, the authors of this article refer to a system of spaces (*loci*) produced for, utilized by, and assigned to children. Such spaces can be both real, physical spaces and imaginary, socially constructed spaces, sometimes created by children (often known as 'secret spaces'), and sometimes by adults¹. In the later case, adults often take into consideration the particularities of children's ages and needs, as well as desired educational goals, in designing learning, recreational, and other kinds of spaces.

Throughout the 1930s, the number of children's spaces rapidly expanded in Russia, particularly in cities. Environs previously considered only for adults, such as hospitals, stores, and train stations, incorporated infrastructure that would accommodate children, such as children's rooms and playgrounds. Naturally, these additions contributed to the evolving purpose and use of inherently social spaces. Undoubtedly, though, the most important children's space during the 1920s and 1930s was the Soviet school. Particularly when compared with its pre-Revolutionary counterpart, the Soviet school flourished under the Bolshevik educational paradigm.

In utilizing school space as an organizing principle, we avoid reducing it to a mere vessel for ideological views. Rather, we treat it as a site of interaction between various political and social claims, projects, and ambitions. As Pierre

¹ For more on this distinction, see: M.V. Osorina, *Sekretnyy mir detey v prostranstve mira vzroslykh* [The Secret World of Children in Adult Spaces], 2nd ed., Saint-Petersburg, Piter, 2011; E.E. Sapogova, *Kulturnyy sotsiogenez i mir detstva* [Cultural Sociogenesis and the World of Children], Moscow, Academic Project, 2004.

Bourdieu argued, physical space is always a «social structure located in an objectified state»². In this regard, the Soviet school operated as a site of power penetration into the locus of social life, as the state used its authority to introduce new values and norms for children that in turn helped to restructure society.

From the earliest days of the Soviet era, the Bolshevik leadership devoted careful attention to schools as part of a meticulously formulated strategy to recreate the political and ideological foundations of society³. The Soviet state, with its apparent 'engineering ambitions', as described by Z. Bauman, could not help but design new schools that reflected the values and worldview of the Bolshevik regime. From the inception of the Soviet Union, Party ideologues and educators strove to develop and implement special educational strategies that advanced the interests and adhered to the ideological contours of the regime, broadly construed under the rubric of *sotsvos* (social education). Old, pre-Revolutionary styles of schools were denigrated in favour of the new, Soviet school that would serve as a «therapeutically useful space» in the formation of a normative Soviet subject through the inculcation of Soviet values⁴. The school, which functioned as a transitory space or a «crisis heterotopia» in the formulation of Michel Foucault, embodied a range of disciplinary functions that met the needs of the new political era⁵. The school came to be understood as not just a place of gradual transition from one social stage to another (from child to adult, or pre-schooler to student), but as one of the first loci in which a person might gain a sense of his Soviet identity. Notably, the Soviet regime considered schoolchildren particularly effective conduits for introducing the values of the new era into the rest of the family environ. Especially during the early years of the Bolshevik regime, authorities tested the extent to which educational practices exerted on youth transferred to other segments of Soviet

² P. Bourdieu, *Sotsiologiya sotsialnogo prostranstva* [Sociology of Social Space], Moscow, Institute of Experimental Sociology, Saint-Petersburg, Aleteya, 2005, p. 53.

³ One of the Soviet government's first decrees was to approve the reform of secondary schools in a RSFSR Sovnarkom resolution from November 30, 1917. <http://www.lawmix.ru/docs_cccp/8288> (accessed: August 4, 2014). For more on the first legislative decisions of the Bolsheviks in the field of public education, see: G.I. Petrov, *Osnovy sovetskogo zakonodatel'stva o narodnom obrazovanii* [Soviet Law Principles in Popular Schooling], «Pravovedenie» [Jurisprudence], 1973, n. 5, pp. 7-17.

⁴ M. Foucault, *Nadzirat' i nakazyvat'. Rozhdenie tur'my* [Discipline and Punish: The Birth of the Prison], Moscow, Ad Marginem, 1999, p. 211.

⁵ M. Foucault's concept of heterotopia seems more methodologically suitable for the study of school space than the work of A. Lefebvre, particularly from the point of view of everyday life (A. Lefebvre, *The Production of Space*, Oxford, Blackwell, 1991). Far from all scholars of everyday life would agree with the application of this category in the study of children and childhood, though, particularly in terms of temporal and spatial consciousness (V.D. Leleko, *Prostranstvo povsednevnosti v evropeyskoy culture* [Everyday Space in European Culture], Saint-Petersburg, Saint-Petersburg State University of Culture and Arts, 2002, p. 66).

society, particularly as the «revolutionary masses» of the time remained childlike themselves⁶.

As a site of discipline, Soviet schools required a perfect harmony of organization, composition, and order, reflected not only in the images and symbols that filled the educational space, but also in their physical construction and architectural organization. Moreover, the location of the school, endowed with special symbolic functions to help organize the social patterns of the local community, was just as important as the appearance of the school building.

In our study, we focus on urban Soviet schools. Nowhere was the construction of the new, socialist world as obvious and tangible as in cities. Particularly in the 1920s and 1930s, intense theoretical discussions and debates broke out between ‘urbanists’ and ‘deurbanists’ about the ‘socialist optimum’ of a city’s size and shape. The city served as the primary experimental platform for introducing bold social and cultural innovations, often of an architectural nature. These projects evoked a range of reactions from both official organizations and the public, which at times wholeheartedly adopted them, or completely rejected, censured, and abandoned them. In our opinion, the Soviet Union’s urban landscape serves as an effective framework for showing the scale, systematization, and versatility of Bolshevik ambitions to create a uniquely Soviet culture of childhood. Studying the architecture and topography of Soviet schools reveals and confirms the importance of urban space not only as an aesthetic and visual aspect of the new Soviet culture, but also as an effective locus for the socialization of both children and adults. The Soviet school functioned as an incubator in forming the ‘new Soviet man’ and the new Soviet reality as a whole.

In Russian historiography, the study of Stalinist architecture has traditionally focused on monumental, large-scale projects⁷, while ignoring more common and typical forms of architecture⁸. Our study breaks from this trend in studying

⁶ For more, see: A.A. Salnikova, *Rossiyskoe detstvo v XX veke* [Russian Childhood in the 20th Century]: Istoriya, teoriya i praktika issledovaniya, Kazan, Kazan State University, 2007.

⁷ Yu.L. Kosenkova (ed.), *Arkhitektura stalinskoy epokhi* [Architecture of the Stalinist Era], Opyt istoricheskogo osmysleniya, Moscow, Komkniga, 2010; A.A. Vas’kin, *Stalinskie neboskryoby* [Stalin’s Skyscrapers]: ot Dvortsa sovetov k vysotnym zdaniyam, Moscow, AST Astrel, 2003; S.O. Khan-Magomedov, *Arkhitektura sovetskogo avangarda* [Soviet Avant-garde Architecture]. *Problemy formoobrazovaniya*. Mastera i techeniya, Moscow, Stroyizdat, 1996; D. Khmel’nikskiy, *Arkhitektura Stalina* [Stalinist Architecture]. *Psikhologiya i stil’*, Moscow, Progress-Tradition, 2007; and D. Khmel’nikskiy, *Zodchiy Stalin* [Architect Stalin], Moscow, New Literary Observer Publishing House, 2007.

⁸ One of only a few exceptions is a volume dedicated to the three hundredth anniversary of St. Petersburg: V.V. Smirnov, *Peterburgskie shkoly i shkol’nye zdaniya* [Petersburg Schools and School Buildings]: *istoriya shkol’nogo stroitel’sтва v Sankt-Peterburge-Leningrade-Sankt-Peterburge. 1703-2003*, Saint-Petersburg, Russian-Baltic Information Center Blits, 2003. However, the search for a Soviet model of architectural and educational space is not the main subject under investigation in this study.

the everyday space of the Soviet school, whose architectural formation has been described as the «dominant artistic form of the era»⁹.

We base our research on the close study of Soviet periodicals in the 1920s and 1930s that address these architectural and educational themes. First, we turned to Soviet architectural journals, particularly those published by professional organizations, which were actively engaged in debates over transformation of urban space: «Sovremennaya arkhitektura» (Modern Architecture), 1926-30; «Stroitel'stvo Moskvyy» (Construction of Moscow), 1929-39; «Sovetskaya arkhitektura» (Soviet Architecture), 1931-34; «Akademiya arkhitektury» (Academy of Architecture), 1934-37; and «Arkhitektura SSSR» (Architecture of the USSR), 1936-88. These publications treated the formation of school space as an issue to be decided by fiat through the dissemination of tasks and resolutions from above. Second, we devoted attention to Soviet children's journals, particularly «Pioner» (Pioneer). One of the oldest children's journals, published from 1924 to the present day, «Pioner» had a target audience of children ages eight to thirteen. The pages of this journal presented debates over the organization of school space in a form adapted for children's consumption. «Pioner» also engaged directly with children by publishing letters to the editor and responses to questionnaires. These journals, unlike other mass media forms such as newspapers and radios, featured direct communication with a particular audience, which meant that messages could be shaped and modified in a customized effort to influence and shape consciousness.

In researching this article, we adopted an innovative approach by using the reference book *Letopis' zhurnal'nykh statei* (Chronicle of Journal Articles) for 1929-39 to compile an exhaustive source base of every journal publication related to our topic¹⁰. This allowed us to ensure that we considered every manifestation of the public discourse regarding Soviet schools.

⁹ M.M. Iskandarov, A.Yu. Mikhailov, *Fenomen "stalinki"* [The "Stalinka" Phenomenon]: Metodologiya issledovaniya, «Izvestiya KazGASU» [Proceedings of Kazan State University of Architecture and Building], vol. 14, n. 2, 2010, pp. 14-19.

¹⁰ Zh.A. Khamitova, *Sovetskaya zhurnal'naya periodika 1930-kh godov kak istochnik po istorii formirovaniya detskogo prostranstva sotsialisticheskogo goroda* [Soviet Journal Periodicals as a Source for the History of the Formation of Children's Space in the Socialist City], Thesis for a Candidate's degree in History, Kazan, 2013; Zh.A. Khamitova, *Metodika otbora istochnikov issledovaniya s pomoschyu "Letopisi zhurnal'nykh statei"* [Methods of Sources Selection Using "The Letopis' of Journal Articles"] (na primere temy sovetskogo detstva 1930kh gg.), «Istoricheskue, filosofskie i yuridicheskie nauki, kul'turologiya i iskusstvedenie» [Historical, Philosophic, Law, Cultural, and Arts Studies], vol. 9, n. 1, 2013, pp. 191-194.

1. *Soviet children's educational institutions and architectural-social utopias*

During the late 1920s and early 1930s, the architectural formation of children's spaces tapped into grand, socio-political movements encapsulated in utopian dreams to remake the 'land of the Soviets' into a world of unparalleled cultural experimentation.

Of course, the Bolshevik Revolution of 1917 completely altered the lives of Russian children, first and foremost by destroying the old school system. Yet the Bolshevik regime's ambitious plans to rid schools of their traditional social and class stratification were quickly stymied by a lack of economic resources and the mundane realities of everyday Soviet life¹¹. Despite the adoption in October 1918 of the Regulations on the Unified Labor School of the RSFSR, for several years authorities neglected discussing the architectural formation of Soviet educational infrastructure due to the outbreak of civil war in the country. After the end of hostilities in 1921, the young Soviet republic was too impoverished to begin constructing any schools. All financial and physical resources were directed to surviving and overcoming the immense devastation that permeated the country.

Consequently, children continued to study in pre-Revolutionary school buildings, or in other environs haphazardly adapted for such use. In these establishments, the regime reinforced its educational and cultural values primarily through the large-scale decoration of school facades and interiors. Symbols of the Soviet era could be seen everywhere: red flags and stars, garlands, slogans, and portraits of revolutionary leaders, such as V.I. Lenin and others. This approach to the ornamentation of educational spaces paralleled the plan Lenin presented in 1918 for erecting monumental propaganda throughout the country, which on a large scale included the decoration of streets, squares, and building facades for revolutionary holidays, as well as mass public demonstrations and theatrical performances¹². Still, most of the new, Soviet architectural projects designed in the spirit of «romantic revolutionism» never

¹¹ Gymnasiums and real schools, which educated children from wealthy backgrounds, were typical kinds of schools in prerevolutionary Russia. While they adhered to all educational and health requirements, these schools were not widespread; for example, there were only five in the entire province of Kazan. However, the quality of their architecture was so high that, to this day, many are used as buildings for Kazan's higher educational institutions, such as the main building of Kazan Federal University and the Kazan National Research Technical University, although they have undergone thorough reconstruction and renovations. Other categories of schools included parish schools, where classes took place in huge classrooms of 120 square meters, with children of different ages and capabilities simultaneously studying in this space. For more on this topic, see: *Proshloe shkol'nykh zdaniy* [The Past of School Buildings]: *tipovye proekty*, <http://www.forma.spb.ru/Arch_project/project-history.shtml> (accessed: August 6, 2014).

¹² *Sovetskaya arkhitektura za 50 let* [50 Years of Soviet Architecture], Moscow, Construction Literature Publishing House, 1968.

saw the light of day¹³. Similarly, most school buildings of that time remained organized around the traditional classroom system used in the prerevolutionary era.

Between the mid-1920s and the early 1930s, the situation changed dramatically. The synthesis of avant-garde thinking, civic indifference to solutions of contemporary social problems, and a growing professional interest in the search for new architectural forms led to the creation of bold architectural projects specifically designed for educating and raising the new Soviet man. These projects emerged during the discussions about 'socialist resettlement' in 1929 and 1930 in one of the most important constructivist architectural journals, «Sovremennaya arkhitektura» (Modern Architecture). These plans strove to create a 'model socialist city' that would meet all social, cultural, and everyday needs of the Soviet citizen. Notably for this study, this city would prioritize education and adhere to the Bolshevik doctrine of the «new socialized, communistic way of life» through «collective education outside the family unit» as its ideal model¹⁴.

Two sides emerged in these debates¹⁵. The 'urbanists', led by L. Sabsovich, supported the construction of large-scale socialist cities comprised of enormous communal houses¹⁶. Their opponents, the 'deurbanists' led by M. Okhitovich, advocated the creation of small, 'non-stationary' settlements, in which homes could be easily disassembled and reassembled at another location¹⁷. These settlements would be established along a long belt of land in an effort to erase the boundaries between city and countryside. Interestingly, though, in their approach to the organization of children's space, the urbanists and deurbanists found common ground. Both proposed creating communal child-rearing spaces in small groups that operated in almost complete isolation from adults (although

¹³ These architectural projects, known as 'paper architecture', were not undertaken for various reasons, such as technical complexity, cost, scale, or censorship. For example, in the Architectural and Art Workshop of the RSFSR Narkompros, several kinds of these 'model' schools were proposed: the school-monument to Leo Tolstoy in Yasnaya Polyana (1919) and a working school (1920). For more, see: Khan-Magomedov, *Arkhitektura sovetskogo avangarda*, <http://www.alyoshin.ru/Files/publika/khan_archi/khan_archi_2_109.html> (accessed: August 9, 2014).

¹⁴ «This is our primary requirement, the ABCs of socialism. Nurseries, cafeterias, and orphanages are all letters in this alphabet. But these letters must converge into one word, the commune, and this is a difficult task. The proletariat must immediately work to destroy the family as an organ of expression and exploitation» (V. Kuz'min, *O rabochem zhilishchnom stroitel'stve* [On the Workers' Housing], «Sovremennaya arkhitektura» [Modern Architecture] (subsequently cited as: «SA»), n. 3, 1928, p. 82).

¹⁵ For more on the contours of these debates, see: V.E. Khazanova, *Sovetskaya arkhitektura pervoy pyatiletki* [Soviet Architecture of the First Five-Year Plan]. *Problemy goroda buduschego*, Moscow, Science, 1980.

¹⁶ A. Pasternak, *Spory o buduschem goroda* [Disputes on the Future of the City], «SA», 1930, n. 1-2, p. 57.

¹⁷ M. Okhitovich, *Zametki po teorii rasseleniya* [Notes on the Settlement Theory], «SA», 1930, n. 1-2, pp. 7-17.

after being criticized by an architect A. Pasternak, L. Sabsovich permitted a child to live with her mother for a short time as a «transitional period»¹⁸. For example, the deurbanist project «Green City» designed by M. Barsch and M. Ginzburg, based on the principle of belt construction, incorporated so-called «children zones» as well as small schools that could accommodate 150 pupils, on the opposite side of the road from the adult residential areas¹⁹. The same concept can be found in urbanist proposals for new Soviet cities such as Magnitogorsk, Avtostroï, and Kominternovsk²⁰. Children's areas, including school campuses, were either located across from the sectors designated for the social and cultural life of adults, or placed between adult apartment complexes. From infancy to eighteen years of age, children would live separately from their parents and other adults, but could communicate and interact with them in special classrooms or «zones for collaborative work». As one designer elaborated, «The internal discipline and regulation of time required in [these children's institutions] means that direct contact with the living quarters of adults is not only unnecessary, but even harmful»²¹.

The urbanist and deurbanist projects also reflected changes to the ideal content and organization of school education. In the context of the rapid industrialization of the country, the demand for 'work schools' (*trudovaia shkola*) notably increased. The polytechnic school in particular emerged as a popular form for incorporating mandatory child and adolescent labor in the educational process, inextricably linking schooling with industrial production. Introduced in 1928, the laboratory-brigade teaching method²² required a fundamental change in the structure of the school building itself by replacing traditional classrooms with industrial laboratories, workshops, and offices²³. Every school in M. Barsch and M. Ginzburg's Green City had its own technical specialization, and children were to rotate through several different schools

¹⁸ L. Sabsovich, *O proektirovanii zhilykh kombinatov* [On the Design of Housing Centers], «SA», n. 3, 1930, p. 6.

¹⁹ M. Barsch, M. Ginzburg, *Zelyonny gorod* [Green City], «SA», 1930, 1-2, pp. 17-29.

²⁰ *Poyasnitel'naya zapiska k rasseleniyu pri Magnitogorskom khimiko-tekhnologicheskome kombinat* [Explanatory Note for the Settlement near the Magnitogorsk Chemical and Technological Industrial Complex], «SA», 1930, n. 3, pp. 1-4; M. Zhirnov, M. Sinyavskiy, L. Komarova *et al.*, *Proekt goroda Avtostroy* [Project of the City Avtostroy], «SA», 1930, n. 3, pp. 10-12; G. Vegman, M. Latysheva, *Proekt goroda Kominternovska* [Project of the City Kominternovsk], «SA», 1930, pp. 12-14.

²¹ Vegman, Latysheva, *Proekt goroda Kominternovska*, cit., p. 14.

²² The brigade-laboratory method of teaching was based on students working together in teams to complete independent studies projects rather than the traditional class-lesson system under the close supervision of a teacher. The educational process of these groups took place in a laboratory or office where students worked on assignments on their own.

²³ «The new kind of school building should be based on the principles of: a) mass production; b) active learning; c) rationality; and d) maximum collectivity» (M. Paushkin, *Otvet na anketu "Sovremennoy arkhitektury"* [Answer to the «Modern Architecture» Questionnaire], «SA», 1927, n. 1, p. 25).

in order to receive a complete polytechnic education²⁴. The school campuses included within some of the aforementioned designs for new Soviet cities often included laboratories, workshops, and self-study classrooms for developing adolescents' technical skills.

In general, the wave of constructivist architectural plans that emerged during this period paid only secondary attention to schools. Spaces designed for children, often identified in the most general terms such as children's zone, center, area, and sector, faded into the background. The few children's institutions identified in these projects included traditional facilities such as nurseries, kindergartens, and schools. As a rule, children's lives were kept as spatially distant from adults as possible, with little overlap. The generalized architecture of schools in these projects did not feature any noteworthy design approaches. In developing Soviet socialist utopias, project designers paid more attention to the location of the school building within the city than its appearance and internal structure. Still, one can assume that the interior and exterior of the school would have mirrored the dominant constructivist aesthetics of the rest of the city.

Notably, even the children's journal «Pioner» participated in the public discourse concerning socialist resettlement. One science-fiction story published in «Pioner» in 1930 described cities of the future, clearly combining the deurbanist concepts of M. Okhitovich and the communal living proposals of L. Sabsovich:

An hour later, the packed home was on a truck, leaving behind only a blackened bald spot on the ground and some tire tracks in the sand. The trucks ... carried away the homes and their occupants to new places. Roads off the right side of the highway led to huge factories. On the other side of the highway [...] were multistory buildings, their countless windows reflecting the dazzling, shining sun. There were schools, teaching laboratories, clubs, libraries, public kitchens [...] This is how you should imagine the new city, surrounded by parks, a few kilometers away from the factories. Fifty or sixty thousand people live there. While there are not many houses, all of them are multistory, with five to ten floors each. Every resident has his own room in which he sleeps. These rooms are very small, with the majority of space devoted to common rooms that provide everything needed for the new, cultured life. [...] School campuses are located in another park, closer to the factories, which will be linked to the work of the school²⁵.

«Pioner» then invited its young readers to send to the editors their own descriptions of how the city of the future should function, encouraging particular attention to children's spaces²⁶. In turning our attention to these 'pioneer' submissions, we concede that the question of authorship is beyond

²⁴ Barsch, Ginzburg, *Zelyonyy gorod*, cit., pp. 17-29.

²⁵ *O kochyuyuschikh domakh, o gorodakh-parkakh, o tom, chto skoro nastanet* [On Migrant Houses, on Cities-Parks, and the Extent to which They will Soon Appear], «Pioner» (subsequently cited as: «P»), 1930, n. 2, pp. 10, 20.

²⁶ *Kak nam zhit' v sotsialisticheskoy gorode?* [How Will We Live in the Socialist City?] Konkurs, «P», 1930, n. 4, p. 12.

the scope of our study. Certainly, the journal's editorial board made sure to publish only ideologically correct proposals. If the submissions actually came from children, we might conclude that these issues resonated with the young readers as they dreamed of a fantastic future. On the other hand, if adults created these allegedly child-produced responses, we would observe a desire to convey the 'correct' view of the future Soviet city to young readers through interesting and accessible texts and examples.

Responses to the call for submissions, regularly published in «Pioner» over the course of 1930, were compiled so as not to contradict each other. Featuring fairly uniform content, all of the proposals described children living isolated from adults, some on separate streets²⁷ and some in their own cities²⁸. Children were assigned living quarters in specially constructed dormitories. Adults only appeared as teachers and educators on a rotating basis. As one submission described, «All adults must be taught how to raise children. For three months they will work on raising and educating children, then for three months they will go back to work in the factory, during which time they will be replaced by others»²⁹. Any adults that children found «objectionable» (neugodnye) would be subject to immediate removal from the children's zones³⁰.

In one of the most radical and detailed submissions, the pioneer A. Seretskii from Khar'kov described a vision of the new socialist city in which the only acceptable citizens, besides children, were workers who had never been convicted of a crime and were «not drunkards, but rather friends of Soviet power»³¹. The 'well-organized' lives of children, isolated from adults, would be concentrated around the school campus, which consisted of two enormous semicircular school buildings. With an astounding nine hundred classrooms each, the schools would accommodate 70,000 pupils from ages twelve to twenty. The proposal called for including a tram system inside the schools to facilitate efficient movement between study areas.

These children's proposals fully adhered to the Soviet regime's vision for educational space. Based on the principle of collective labor training, the proposals reflected the growing interest in polytechnic institutions. Schools were assigned an appropriate place in the city of the future, not far from plants and factories³². As one orator noted on behalf of the Commissariat for Education:

²⁷ F. Mil'kov, *Kak nam zhit'?* [How Must We Live?], «P», 1930, n. 15, p. 7.

²⁸ A. Bogdanova, *Kak zhit' v sotsgorodakh* [How to Live in Socialist Cities], «P», n. 12, 1930, p. 11.

²⁹ *V novye goroda – novuyu zhizn'* [To New Cities, to New Life], «P», n. 4, 1930, p. 1.

³⁰ Bogdanova, *Kak zhit' v sotsgorodakh*, cit., p. 11.

³¹ A. Seretskii, *Proekt novogo goroda* [Project for a New City], «P», n. 17, 1930, cover.

³² «It is important to link theory with practice; for this regard, the factory should lead the school» (M. Epshtein, *Otchyot Narkomprosa pered rebyatami o stroitel'stve shkol* [Narkompros Report to Children on School Construction], «P», 1930, n. 1, p. 1).

As with industrialization, so to for the school! ... I recently read the works of Lenin, who said that only through the labour of workers and peasants can a person become a true communist. Yet, when we go to factory workshops, we look at them as if they were in a museum³³.

Although under the influence and supervision of adults, the image of the school, as well as the entire 'children's universe' constructed by youth in their proposals to «Pioner», resembles the classic fairy tale trope in which children exist as far away as possible from adults. In fact, proposals described a world in which children were fully responsible for adult issues. In these scenarios, children played an active role in creating and educating ideal Soviet subjects, citizens of the great Soviet country heading into a bright communist future. Most notably, even these illusory and fictitious proposals foregrounded the disciplinary role of the Soviet school.

The projects published in «Pioner» were never destined for reality, though. In June 1931, the Plenum of the Central Committee of the Communist Party brought an end to the dreams of architectural utopias, strongly condemning both urbanist and deurbanist trends as «deviations of Left-opportunist phrasemongers who advance all kinds of fantasies»³⁴. M. Okhitovich and, likely, L. Sabsovich subsequently perished in the dungeons of the Gulag. The April 23, 1923, resolution from the Central Committee of the Communist Party, On the Restructuring of Literary and Artistic Organizations, dissolved all extant architectural groups, creating in its stead a single Union of Soviet Architects³⁵. Finally, in July 1935, the USSR Council of People's Commissars and Central Committee of the Communist Party jointly approved a new General Plan for the reconstruction of Moscow, which reflected the official position of the state in regard to the reconstruction and development of Soviet cities.

During this period, the People's Commissariat for Education (Narkompros) drastically revamped its school curriculum. In a joint resolution from August 25, 1932, On curricula and operation of primary and secondary schools, the Sovnarkom and Central Committee instructed the Narkompros to «liquidate» the «perverse laboratory-brigade method» and return to the traditional, classroom-based learning process. On May 15, 1934, the resolution On the Structure of Primary and Secondary Schools in the USSR ended all other educational experiments³⁶. Subsequently, architects began receiving clearly defined orders

³³ *Perepiska za 1930 god* [Correspondence for 1933], «P», n. 2, 1930, p. 18.

³⁴ *Postanovlenie Plenuma TSK VKP(b)* «O moskovskom gorodskom khozyaystve i o razvitií gorodskogo khozyaystva» [Plenum of the Central Committee of the All-Russian Bolshevik Communist Party's Decree «On the Moscow Municipal Economy and on Municipal Economy Development in the USSR»], June 15, 1931, <http://www.1000dokumente.de/?c=dokument_ru&dokument=0008_gen&object=translation&l=ru> (accessed: August 8, 2014).

³⁵ *Istoriyu – v shkolu* [To School for History]: *Sozdanie pervykh sovetskikh uchebnikov*, Moscow, [s.n.], 2008, p. 18.

³⁶ According to the decree «In Interests of Ensuring a Clear Organizational Structure and

for designing Soviet schools. They were to be built in the best parts of cities and draw from the so-called Stalinist neoclassical style of architecture, a physical manifestation of the ‘happy Soviet childhood’.

2. Schools and the spatial landscape of the socialist city: A case study of Moscow

As we argue in this section, while construction in the Soviet Union generally slowed during the late 1920s and early 1930s, school buildings continued to grow in size, in part due to the popularity of the polytechnic and brigade-laboratory pedagogical approaches, rooted in the perceived economic viability of large institutions. The introduction of universal primary education for the Soviet Union in 1930 also furthered the expansion of school space.

In Moscow, the construction of new school buildings began picking up pace in 1926. That year, the Moscow Department of Education introduced its polytechnic pedagogical approach. This new form of school organization was utilized in creating seven-year factory schools that could accommodate 560 pupils at a time. The first of their kind, these truly Soviet schools fundamentally differed from their pre-Revolutionary counterparts, which until that time had dominated Moscow’s educational landscape. The new schools, around 25,000 cubic meters in volume, were equipped with sports facilities, laboratories, workshops, and dining rooms³⁷. During this period, several seven-year schools were built in Moscow based on the designs of B. Sidorov (1927); I. Rybchenkov and A. Zharkov (1928); and others³⁸. Most classroom spaces remained similar in organization to their predecessors, though.

In 1928, the transition to the brigade-laboratory educational method prompted the development of new school designs. For example, the ten-year factory school model could accommodate eight hundred pupils, including ninety children with absolutely no education. Designs for these schools expanded to include eleven grade levels, three laboratories, and a range of offices, workshops, libraries, recreation and fitness facilities, and cafeterias. In 1931, one draft plan even proposed a 1,100-pupil school with an enormous volume of 41,000 cubic meters³⁹.

Order in Schools», the USSR established elementary, junior high, and high schools, setting their capacity at 880, 400, and 280 pupils, respectively (<<http://www.bestpravo.ru/sssr/eh-dokumenty/z2r.htm>> (accessed: August 10, 2014).

³⁷ For more on this project, see: I. Zvezdin, *Ot primitivov-gigantov k dvortsam uchyoby* [From Primitive-Giants to Palaces of Education], «Stroitel’stvo Moskvy» [Construction of Moscow] (subsequently cited as: «SM»), n. 7, 1933, pp. 5-7.

³⁸ Khan-Magomedov, *Arkhitektura sovetskogo avangarda*, cit.

³⁹ Zvezdin, *Ot primitivov-gigantov k dvortsam uchyoby*, cit., p. 5.

At an all-Russian conference dedicated to discussing school construction in 1928, delegates debated the contemporary functions and objectives of schools, as well as their social and aesthetic role in the Soviet city. The conference recognized the need to create a plan so that the architecture of future schools would better reflect their basic political and ideological function of training new cadres to work in the country's massive industrial enterprises⁴⁰.

Before too long, the disadvantages of these massive schools became apparent, particularly given the difficulty of finding sufficient space to build them in overcrowded cities. Architects had to temper their aspirations upon assessing the size and location of available construction sites⁴¹. Following the abandonment of the brigade-laboratory method and the return to the class-lesson pedagogical system in 1932, these impractically large school designs were abandoned in favor of more realistic sizes.

Nonetheless, until 1935, architects continued to rely on what was described as «obsolete and abandoned forms of pedagogy» in planning the structure of the school building itself, as well as when designing interior and exterior décor⁴². These schools, overcrowded with ancillary facilities and laboratories at the expense of classroom space, were filled with depressing and dark interior hallways rather than uplifting, bright, and spacious corridors⁴³. The 'impoverished' and minimalist constructivist design of the building's interior and exterior hindered school administrators' ability to inundate pupils with Soviet symbols and values.

The increasingly important Culture-2 of the Stalinist era demanded new architectural forms⁴⁴. Between 1933 and 1935, Soviet architectural publications harshly criticized the design of existing Soviet schools. The famous Soviet architect I. Zvezdin, who also served as the head of preschool and primary school construction for Mosproekt, raised this issue in the article, *From Primitive Giants to Palaces of Study*. Zvezdin described the ongoing stylistic shift in Soviet architecture from the laconic aesthetics of constructivism to the monumentality and solidity, pathos and grandeur, and hierarchy and dogmatization of Soviet neoclassicism⁴⁵. Zvezdin considered the school designs

⁴⁰ A.S. Nikol'skiy, *O novom shkol'nom stroitel'stve* [On New School Construction], «SA», n. 4, 1928, pp. 114-116.

⁴¹ A.F. Rodin, *Planirovka goroda i deti* [Urban Planning and Children], «SM», n. 17, 1936, pp. 2-4.

⁴² A. Schelokov, *Novye formy shkol'nogo stroitel'stva* [New Forms of School Construction], «Arkhitektura SSSR» [Architecture in the USSR] (subsequently cited as: «ASSR»), n. 5, 1935, pp. 25-26.

⁴³ P. Tol'tsiner, *K voprosy o tipe shkoly-kholla* [On the Subject of Types of School-Halls], «Sovetskaya Arkhitektura» [Soviet Architecture] (further cited as: «SA»), n. 6, 1933, pp. 36-39.

⁴⁴ Papernyy contrasts two models and periods of Soviet culture against each other, the more 'democratic' *Culture One* (1917-1920s) and the 'totalitarian' *Culture Two* (1930s-1953): V. Papernyy, *Kultura Dva* [Culture Two], Moscow, New Literary Review, 1996.

⁴⁵ Zvezdin, *Ot primitivov-gigantov k dvortsam uchyyoby*, cit., p. 7.

proposed between 1929 and 1931 ‘primitive’ in their architectural formation. He contrasted them with newer, more compact proposals designed for 600 pupils and with a volume of 18,000 cubic meters. As Zvezdin explained, these designs reflected a «rich architectural study of interior decoration», evidenced by polished plaster, marble, marble paint styles, and interior sculptures and bas-reliefs featuring Soviet symbols and ideological content.

For example, in the school designed by I. Zvezdin and A. Antonov as part of the Chemical Plant named for Voikov, located on Moscow’s Leningrad highway, recreational facilities were lined with polished, fluted pilasters. Between them, busts of revolutionary leaders and key figures of the Party, as well as of science and technology, were placed on pedestals. Behind these busts were two large decorative murals, and bas-relief over the doors depicted revolutionary themes. Murals portraying the latest achievements of ‘socialist construction’, including the Dnieper Hydroelectric Station, the White Sea-Baltic Canal, and the Kuznetsk Basin, also lined the school’s corridors⁴⁶. Moscow’s School No. 201, also designed by Zvezdin, was decorated in an equally luxurious style⁴⁷.

These structures, however, were the exception to the rule. Most Soviet schools of the time were poorly decorated, simple buildings. The journal *Stroitel’stvo Moskv*y published the photo of a school in the Moscow suburb of Fili, built from 1930-33 by architect A. Antonov. Commenting on the photo, editors noted, ‘The building has a uniformly dull appearance, its architecture more evocative of a bakery than a school. Such a depressing building is not suitable for children’⁴⁸.

Debates about Soviet school architecture peaked on February 22, 1935, with the adoption of the resolution *On the Construction of Schools in Cities and Admission to Higher Educational Institutions* by the USSR Sovnarkom and the Party Central Committee⁴⁹. The resolution contained clear instructions for the design of school buildings throughout the Soviet Union, calling for their quick design and construction. Marked by an «elevated and solemn form», these schools were to feature a more rational layout, with the percentage of space devoted to classrooms increasing from 35 per cent, the previous norm, to between 60 and 65 per cent. Enrolment was limited to between 280 and 880 pupils. Schools were to be built as close to their places of residence as possible.

A large-scale program for the construction of schools gripped the country. In Moscow alone, 72 schools were built in 1935, with another 150 in 1936⁵⁰.

⁴⁶ *Ibid.*, cit., p. 6.

⁴⁷ *Ibid.*, cit., pp. 6-7.

⁴⁸ V. Khandros, *Iz opyta odnoy perekhodyaschey stroyki* [From Experiences of One Transient Construction Site], n. 12, 1933, p. 8.

⁴⁹ *Narodnoe obrazovanie SSSR* [Popular Schooling in the USSR]. *Obscheobrazovatel’naya sbkola*. [Collection of Documents]. 1917-1973, Moscow, Pedagogika, 1974, pp. 517-519.

⁵⁰ D. Aranovich, *Vtoroy tur sbkol’nogo stroitel’stva* [Second Round of School Construction], «ASSSR», n. 4, 1936, p. 26.

Design and construction were carried out as quickly as possible⁵¹. Yet architects admitted that this backbreaking pace resulted in a number of design flaws, particularly as many architects were designing and building schools for the first time⁵².

School staff actively discussed these new schools. The teacher L.M. Malinovskaia criticized the inappropriate, 'massive' scale of her school, which rendered it «difficult to create and implement a rhythm for school life». F.F. Roshchin, the director of School No. 4 in Moscow's Krasnopresnenskii District, lamented the 'crushing' feel of narrow corridors and the lack of vents in the windows, which made the winter feel colder and the summer unbearably stuffy⁵³. V.V. Serpitskii, assistant director for instruction of Exemplary School No. 2 in Moscow's Frunze District, and A.D. Sergeeva, director of Exemplary School No. 1 in Moscow's Frunze Region, complained about the incorrect balance between classroom space and other facilities, a holdover from the former brigade-laboratory method of teaching. Sergeeva decried how the uniformity of her school's interior design led to disorientation and psychological trauma among children. She wrote:

I remember one child walking down a third-floor hallway, weeping bitterly. He was lost and did not know how to find either his floor or classroom. Of course, we could not accuse the child of being inobservant. The floors, corridors, and classrooms are all too monotonous⁵⁴.

Criticisms about poor school construction ultimately fell on deaf ears, as their structure and style were consistent at least on paper with the overall plan for the city. These designs were included in the Master Plan for the reconstruction of Moscow, approved on July 10, 1935, by the USSR Sovnarkom and Central Committee. Known as the Stalin Plan because of the Soviet Union leader's direct participation in its development, the detailed project served as the overall stylistic and ideological guide for the planning of all other Soviet cities as well. The Stalin Plan even addressed the format and function of children's spaces in the Soviet state⁵⁵.

Moscow's General Plan of 1935 established quantitative indicators for school construction, calling for 390 new schools to be built by 1938 and 530 schools by 1945⁵⁶. These schools were expected to play a large role in the creation of

⁵¹ D. Aranovich claims that 72 schools were built in Moscow over the course of 145 days, *ibid.*, p. 14.

⁵² Ya. Kornfel'd, *Novye shkoly Moskvy* [New Schools in Moscow], «ASSSR», n. 5, 1935, pp. 27-35.

⁵³ N. Kazantsev, *Ne povtoryat' oshibok proshlykh let* [Do Not Repeat the Mistakes of the Past] (*shkol'nye rabotniki ostroitel'stve shkol*), «SM», n. 5, 1935, pp. 34-35.

⁵⁴ *Ibid.*, p. 36.

⁵⁵ Khmel'nitskiy, *Zodchiy Stali*, cit., p. 51.

⁵⁶ <[http://www.landscape-design.ru/articlex.php?c=Moscow-reconstruction 1935&p=4](http://www.landscape-design.ru/articlex.php?c=Moscow-reconstruction%201935&p=4)> (accessed: August 10, 2014).

new residential and social clusters. Located in the middle of neighbourhoods, the schools would educate the children living nearby and also function as community and recreation centres⁵⁷. In this manner the school regained its role as a cultural locus for promoting communist ideals.

While not going into great detail about the construction of urban children's space, Moscow's General Plan did denote a significant shift in the conceptualization of schools. The massive increase in the number of schools reflected the growing popularity of the state-endorsed 'happy childhood' concept, with its complementary spatial and visual elements. Architects faced complex challenges in responding to this new ideological directive. In order to support the development of Soviet children, the spatial planning of the new schools needed to reflect the importance of children and childhood in the Soviet urban landscape. The schools should utilize aesthetic forms to embody the 'happiness' of Soviet children. As one critic explained, «The USSR is the country of the happy childhood. Children's architecture should also be as joyful and full of life as our children»⁵⁸.

Some experts, though, dismissed this design tack as leading to «boring, unattractive, and unambitious» schools, particularly when compared with the grandiose and epochal projects of the mid-1930s, such as Moscow's Palace of Soviets. Yet that era was quickly drawing to a close, in accordance with the Party's line «on children's architecture, with its own style and character», which should «speak about the importance of cultural and social institutions in the same serious tone as industrial and residential architecture»⁵⁹. Typical school buildings were to adopt a solemn appearance without the «exaggerated monumentalism» often «mechanically» assigned to public buildings. Such a monumental approach would look absurd in small towns, workers' settlements, and regional centres⁶⁰. Instead, the architect should imitate the facades of surrounding residential buildings, weaving the school into the fabric of the domestic and social environment.

Widespread construction of these new types of schools began in 1936. Soon after, architects began to report on the remarkable achievements enabled by the «true and complete Stalinist care for children» evident in Moscow's Master Plan, which allocated the most desirable urban areas for construction to schools and other children's institutions⁶¹. In reality, the Master Plan did more to establish an ideological approach than provide any specific directives for construction. Still, the 'breakthrough' in the construction of schools can be dated to 1936, after which new schools also began appearing in other cities, following the

⁵⁷ *Ibid.*

⁵⁸ *Pochyotnaya zadacha* [Honorable Task], «SM», n. 17, 1936, p. 1.

⁵⁹ L. Kashkarova, *Stalinskaya zabota o detyakh* [Stalin's Concern for Children], «ASSSR», n. 10, 1937, p. 60.

⁶⁰ Kornfel'd, *Novye shkoly Moskvy*, cit., p. 31.

⁶¹ *Ibid.*, pp. 56, 58.

example of Moscow. A Plenum for the Leningrad City Economy, held in March 1936, noted the rapid change in pace of school construction as compared to the previous year. By March 10, 1936, construction had begun on 68 of 106 planned schools in Leningrad, with 30 of those scheduled to be roofed by April 1, 1936⁶². Of course, the most progressive changes in school design did not take place in provinces or Leningrad, the 'cradle of the revolution', but rather in Moscow. The Soviet capital, represented in Stalinist culture as the 'city of design' and the 'capital of the world's first socialist state' was to serve as an example for the transformation of all other cities in the country.

The school designs recommended for use by the Union of Soviet Architects in 1935 and 1936 developed in response to contemporary political and pedagogical challenges.

Conclusion

As we have argued, the design for the new Soviet school emerged over the course of the first decades of the Soviet era through a complex and inconsistent process. Historians often describe the 1920s in Russia as a period of quicksand. On one hand, everything was in motion. Ideas of what was normative and non-normative were up in the air; everything was contradictory, chaotic, and changing with rapid speed. On the other hand, Sovietization began to change the country in a persistent and energetic manner. Within the conditions of relative liberalization, even the most daring of projects seemed possible. This is seen in the 'communal child raising' proposals advanced by revolutionary and utopian urbanists and deurbanists during the late 1920s and early 1930s. These projects sought to destroy the old, pre-Revolutionary worldview and replace it with new Soviet values, behaviours, and lifestyles. Soviet schools were to play a critical role in this process. Ultimately, though, these projects were not implemented not only because of a lack of financial resources, but due to a drastic shift in ideology. In the early 1930s, Soviet culture began to transition from revolutionary to statist. In line with these trends, by the mid-1930s, the architectural composition of Soviet schools had adopted more standardized features, shifting away from monumentality toward a plain, solemnly decorated façade, as well as richly decorated interior sacred spaces. Pioneer Corners and Rooms, as well as assembly halls and recreation areas, hosted the most important educational events in the lives of Soviet children, including the celebration of Soviet holidays, receptions for Pioneer and Octoberist children's organizations, and meetings with noteworthy guests and heroes. Most importantly, the children

⁶² «*Leningradskaya Pravda*», 1936, March 14. For more on this topic, see: Smirnov, *Peterburgskie shkoly i shkol'nye zdaniya*, cit., p. 110.

were trained to read and understand Soviet symbols and paraphernalia, such as busts of revolutionary leaders, murals with revolutionary themes, slogans, Soviet posters and banners, and quotations from classic Marxist-Leninist texts.

The place of the school of the Soviet city changed as well, becoming a more organic component of each residential complex. The school functioned as the centre of a neighbourhood's political and educational life; for this reason, polling stations for central and local elections were often set up in schools. By the mid-1930s, schools had acquired all of the components of a 'useful therapeutic space' within the Soviet urban landscape. Soviet schools retained these characteristics until the period of 'Khrushchev utilitarianism' that emerged in the late 1950s and early 1960s. Moscow had a paradoxical role throughout this process. On one hand, the capital set the tone for the construction of schools throughout the rest of the Soviet Union. On the other hand, Moscow existed on a unique and inimitable plane as the epitome of socialist construction.

The efforts of this era had tangible effects, as students and teachers began to understand their obligation to obey the behavioural standards enforced by the cultural space of the new Soviet school, which added to the totality of Soviet rituals. The new schools of the 1930s significantly improved the learning and work environment for students and teachers, as well as their overall living conditions. In moving out of old, dilapidated pre-Revolutionary school buildings, students and teachers found themselves in new, spacious, and bright facilities built in accordance with contemporary sanitary and hygienic standards. The improvement of schools was the key factor in implanting Soviet values in the minds of both students and teachers.

The 19th and 20th-century school as a laboratory for national identity and citizenship education: the case of Uganda

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ABSTRACT: This paper aims at discussing the role of education in advancing national identity and citizenship in Uganda during the 19th and 20th Centuries. The present inhabitants of the region now known as Uganda acquired education through different means, with different actors at different times, and each time period has yielded a different form of educational system, which had a significant role in shaping the changing perceptions among Ugandans as far as national identity was concerned. The central thesis of this article is that national identity as defined by the state came into existence fairly recently in sub-Saharan Africa. During the 'Partition and Scramble for Africa', European countries carved up Africa in a fierce competition for global influence. While striving to ensure their access to the continent's wealth of resources, they severed ethnic groups and grouped different ethnicities together into colonies, in order to prevent the unification of indigenous groups from rising against their rule. Although, it has been suggested that internal political and economic changes in African countries in the 1870s and 1880s prompted the conquest by outsiders, it is nevertheless, clear that Europeans took advantage of the situation by furthering confusion among different ethnic groups. By reinforcing ethnic identification; the British forestalled the rise of a collective consciousness and a common identity among the different groups. When Uganda gained independence in 1962 it strove to restructure its education in order to raise a social consciousness among citizens and thus bring about a national identity and integration. This article however, observes that developing an inclusive national narrative poses real challenges to people as ethnic groups struggle to control the interpretations of the past taught to younger generations.

EET-TEE KEYWORDS: History of Education; Civics; Nationalization; Cultural Identity; Educational System; Uganda; XIX-XX Centuries.

Introduction

Civic education revolves around the concept of the nation and its citizen's natural affinity with it. The spirit of citizenship and national identity has long been absent in most sub-Saharan African countries, as a result of a lack of a national collective awareness. Anderson observed that in most democracies, civic education draws on the liberal idea of related rights and equal participation, but this has been marred in less developed countries such as in sub-Saharan Africa¹. Kabwegyere noted that a national narrative has never been taught to pupils in schools, yet the school context and school work constitute the central domain of a student's life experience to determine who they are and who they would like to be².

What then is national identity? The phrase national identity is closely linked to the concepts of nation and identity. It is important therefore to begin with defining these concepts and showing how they finally give rise to the idea of national identity. It should however be noted at offset that there is a lack of consensus amongst scholars who have attempted to define the above concepts. The notion of 'Identity' in itself refers to an individual's conception of the self. It is the response to the question: «Who am I?» Every individual embodies many different identities; social theorists like Tajfel and Turner observed that every identity is fundamentally linked to a social group, which ties people together with a certain set of values, norms and ideals associated with the group identity³. Thus, having an identity means being part of a social group with its own level of cohesion. This view presupposes that the group's identity differs from the national one in an important respect: the idea of a nation has recently obtained enormous emphasis with nationalists working to ensure that the nation comes first before all the other social groups that individuals belong to. According to Smith a nation is a named human population sharing an historic territory, common myths and historical memories, a mass public culture, a common economy, common legal rights and duties for all members⁴. It is this sense of common sharing and belonging, which brings the question of national identity to the fore, implying that national identity has therefore, to do with the collective identity of a group of people within a given territory. Similarly, Marshall defines citizenship as being not only about rights and responsibilities,

¹ B. Anderson, *'Imagined communities' reflections on the origin and spread of nationalism*, 2nd ed., London, Verso, 1991, p. 61.

² T.B. Kabwegyere, *The politics of the state formation: the nature and effects of colonialism in Uganda*, Nairobi, East African Literature Bureau, 1974, p. 145.

³ H.Tajfel, J.C. Turner (edd.), *The social identity theory of inter-group behaviour*, Chicago, Nelson-Hall Publisher, 1986, p. 20.

⁴ A.D. Smith, *Ethnic election and national destiny: some religious origins of nationalist Ideals*, «Journal of the Association for the Study of Ethnicity and Nationalism», vol. 5 n. 3, 1999, pp. 331-355.

but also about the expression of a 'shared identity'; citizenship is then not only a static universal value narrowly related to democratic regimes, but also a volatile notion related to the dynamics of belonging. It is about being a member, or not, of a political community, irrespective of whether this community is democratic⁵. In my opinion however, a meaningful sense of belonging in the form of national identity exists only if individuals who comprise the group are willing to take action on behalf of others.

Anderson observed that the perceptions of such commonalities are often unfounded; leading him to call such nations 'imagined communities'⁶. In this context, one's birthplace determines one's citizenship in the nation. These requirements for citizenship do not necessarily demonstrate that an individual shares a common history and common interests with the rest of the nation. Even if people strongly believe that they belong to a community with other nationals, most of them will never meet each other and thus will never discover whether they indeed do have more in common than they do with nationals.

This article discusses how education has shifted this perception to the transformation of true citizenship in Uganda. The paper is divided into three sections: (i) pre-colonial, (ii) colonial and (iii) post-colonial education. Each section elaborates on a specific aspect of education and examines to what extent it contributed to the building up a spirit of citizenship and national identity.

1. *Pre-colonial education in Uganda*

The Ugandan educational system has gone through different phases and with different actors, which had a significant influence on the general population. Pre-colonial education was centred on the native communities. It was referred to as traditional education that was imparted to natives before the coming of the missionaries. Ocitt asserted that Uganda was comprised of various ethnic communities each with specific social and cultural educational features, which were passed on to future generations⁷. Bray, Clarke and Stephen concurred with Ocitt that there were varied communities, but they also acknowledged that African traditional education shared significant fundamentals with regard to philosophical, sociological and educational features⁸. Based on this, part of

⁵ T.C Marshall, *Class, citizenship and social development*, Garden City, N.Y., Doubleday, 1964, p. 75.

⁶ B. Anderson, *Imagined communities*, New York, Verso, 1983, pp. 141-142.

⁷ J.P. Ocitt, *An Introduction to indigenous education in East Africa*, Nairobi, East African Publisher, 1975, p. 45.

⁸ M. Bray, P. Clarke, D. Stephen, *Education and society in Africa*, London, Arnold Ltd, 1998, p. 21.

the work in this section will be discussing the shared common core values in Uganda as far as social and educational realities are concerned.

Traditional education aimed at developing ethnic identity and solidarity. The ethnic group discussed here is one «whose members share a common identity and affinity based on a common language and culture, myths of common origin and a territorial homeland»⁹. Also in this context ethnicity is considered as a primordial group characteristic that scholars argue is biologically based. The two key points in the primordialist thesis are (a) that ethnicity is derived from birth and (b) that the nature of ethnicity is fixed and permanent. It has also been observed that ethnicity has been conceptualized as a tool used by individuals, groups, or elites to obtain some larger, typically material end¹⁰. Some scholars have refuted this view however, it is not to the interest of this paper to enter into such detailed debate. Nevertheless, the primordialist view suggested that ethnic identities carried more weight and could easily pose a challenge towards national integration.

The social and educational activities of these ethnic groups were carried out informally within the context of family and community for example; all adult members, particularly the parents and elders were responsible for teaching the children how to live and appreciate their roles as members of the family, clan, and ethnic group. The methodology of handing down these skills was based on oral forms of literature through storytelling, proverbs, riddles, poems and songs¹¹. This oral literature played a significant role in preserving the history of the ethnic groups. Mbiti observed that such literature served various purposes: some pieces served as a warning, some taught morals, and others were told as a commentary on the people's lives in a given period, while others served as entertainment¹². This implied that despite the dynamic nature of ethnic identities, each was perceived to be firmly rooted in the past and had a powerful potential for guiding behaviour, and each social group transmitted its collective narrative to future generations to bolster its social identity. This was in contrast to Western educators, who defined this education narrowly. To them, 'education' meant instruction in reading and writing with a specialised group of teachers. The absence of this formal structure must have meant, therefore, that there was no educational system. This idea was not acceptable to Won Nyaci [a traditional ruler] of Langi District in the northern part of Uganda, who had argued that education was not essentially introduced to Uganda by Europeans. He added that the introduction of the European educational system was not the same as introducing education because not all education was European¹³.

⁹ D. Rothchild, *Inter-ethnic conflict and policy analysis in Africa*, «Ethnic and Racial Studies», vol. 9, n. 1, 1986, pp. 66-86.

¹⁰ *Ibid.*

¹¹ Ocitt, *An introduction to indigenous education*, cit., p. 45.

¹² J. Mbiti, *Introduction to African religion*, Nairobi, East African Publisher, 1996, p. 8.

¹³ K.T. Ado, *Missionary teachers as agents of colonialism: A study of their activities from*

Marah however, observed that this system of education lacked codified records and the ability to preserve its wisdom for future generations. He argued that it was confined to its own ethnic identity, and that its recipients lacked contacts with the wider world¹⁴. Also, Levy opposed this education system, stating that education should lead to open-mindedness, should accept other societies, and should weaken ethnic attachments¹⁵. Levy's view appealed more for inclusivity. While it is true that the pre-colonial education was considered relevant and beneficial to all members as it fostered unity and productivity. On the other hand, however, psychologically good it might be to educate children to confine to their ethnic groups; doing so could do little to broaden their intellectual horizons, to facilitate communication outside their home area, or to assist in developing the stability of larger administrative units. Moreover, such educated young Ugandans will exclusively not be well equipped to take positions of responsibility outside their own environment. Although, this traditional form of education was suitable and relevant in its own time, education itself had to change according to the present social, political and economic circumstances. Consequently, in spite of the fact that this form of education still exists, it nevertheless, lost its considerable influence with the advent of colonialism during the 19th Century.

2. *Education during the colonial era*

During the 19th Century the Christian Missionaries altered the traditional education system. Some indigenous leaders encouraged the introduction of European missionary education into their society in order to pursue their objectives of ensuring the continued existence and expansion of their ethnic group. In Uganda, the King of Buganda (Kabaka), had welcomed various visitors into his Kingdom. The first of the foreigners he welcomed, were the Arab and Swahili traders from Zanzibar who were encouraged to stay near the palace of Kabaka [King] Muteesa. In 1877, Protestant teachers of the Church Missionary Society arrived from Britain, and in 1879 the French Catholic Missionary Society, also known as White Fathers, were welcomed into the Kingdom¹⁶. By building relationships with the powerful foreign powers associated with each group, the Kabaka wanted to protect his Kingdom against foreign invasion.

1877-1925, Kampala, Fountain Publishers, 1998, p. 1.

¹⁴ J.K. Marah, *The virtues and challenges in traditional African education*, «Journal of Pan Africa Studies», vol. 1, n. 4, 2006, pp. 15-20.

¹⁵ M. Levy, *Modernisation & structures of society*, Princeton, Princeton University Press, 1966, p. 35.

¹⁶ J.C. Ssekamwa, *History and development of education in Uganda*, Kampala, Fountain Publishers Ltd, 1997, p. 25.

This implied that before the coming of the missionaries and colonial ventures, there were internal and external threats in Uganda. Internally, the rivalry and the war between Buganda and Bunyoro had reached its height and externally, Khedive Ismail of Egypt had started to expand southwards thereby, threatening to invade Buganda and Bunyoro in order to control the source of the River Nile, which was the lifeline to Egypt¹⁷.

These new religious groups spread their ideology and influence by educating the indigenous population, beginning with the Baganda people. The Protestant and Catholic missionaries instructed the Baganda chiefs and servants primarily on Christianity and taught them reading, writing and arithmetic, commonly known as the 3Rs. They taught history through a religious and European lens. The Christian missionaries educated them to change their beliefs too. The introduction of Western education in Uganda aimed at enhancing the evangelization of Ugandans and thus converts them to Christianity. The need to train Black clergy, who would become agents of the missionaries among their own people, led to the establishment of formal schools¹⁸. The main source of their training centred on the inculcation of biblical knowledge as far as Anglican missionary teachings were concerned, while the Catholic missionaries concentrated more on catechetical instruction. This they hoped would liberate Ugandans from their tradition and spirituality. Fafunwa of Nigeria observed that being able to read and write, the missionaries foresaw that the converts would be able to read the Bible and understand the word of God. Thus, the knowledge of the Bible, the ability to recite the catechism, as well as the ability to communicate orally and in writing was considered essential in the education of good Christians¹⁹. This fact was also considered as proof of the sincerity of their newfound faith. While that may have been viewed as a positive gesture, it should nevertheless, be noted that these schools were not in any way geared towards helping Ugandans towards self-assurance and confidence building.

The schools established by the missionaries were boarding schools and the young Ugandans were isolated from traditional education. Watson confirmed that many schools were boarding institutions so that at secondary level, the missionaries could ensure that there was an actual physical separation from their families. Based on this, the teaching methods and the type of curriculum would create a new outlook for the pupils, which was conditioned by European teaching and culture rather than by traditional teaching²⁰. This implied that the missionaries were convinced that if Ugandan children stayed at home they would

¹⁷ J.A.R. Wanetos, *Mastering East African history for O'level*, Kampala, Liso Printers, 1998, p. 136.

¹⁸ Ssekamwa, *History and development of education*, cit., p. 29.

¹⁹ A.B. Fafunwa, *A history of education in Nigeria*, London-Boston-Sydney, George Allen & Unwin, 1974, p. 81.

²⁰ K. Watson, *Colonialism and educational development*, in K. Watson (ed.), *Education in the third world*, London-Sydney, Croom Helm, 1985, pp. 1-39.

be exposed to the evil influences embedded in the Ugandan traditional culture. Notwithstanding the fact that the disparagement of traditional education, which had sustained people from time immemorial and which had been the source of remedies for multiple societal anomalies, had a negative effect on indigenous people. Ngugi Wa Thiongo, lamented this colonial education:

The process annihilate[s] a people's belief in their names, in their languages, in their environment, in their heritage of struggle, in their unity, in their capacities, and ultimately in themselves. It makes them see their past as one wasteland of non-achievement and it makes them want to distance themselves from the wasteland. It makes them want to identify with that which is furthest removed from themselves²¹.

What Wa Thiongo is probably saying here is that the missionaries' formal education system in itself would have done well if it incorporated some of the values of traditional education. However, the ethos of their schooling betrayed and denounced some of the traditional beliefs and practices, with no consideration of local knowledge or local people's everyday experiences. In doing so, they destroyed some relevant and good beliefs. From this perspective, Kelly P. Gail and Phillip G. Altbach were right in their assessment that colonial schools sought to extend foreign dominion throughout the colonies. They observed that this process was an attempt to strip away the indigenous structure and thus force the colonized to conform to the cultures and traditions of the colonizers²². What the promoters of this new type of education did not spell out was that the internationalization of the curriculum would be skewed toward Eurocentric paradigms, particularly, British. The dominance of Eurocentric education over indigenous ways of education undoubtedly created inequality, which resulted in conflict and failure of the education system, which failed to shape the indigenous people's identity and destiny.

Another feature of colonial education was that schooling was minimal at the higher level in comparison with the primary level of education, in the sense that the number of those who attended high schools was small and selective. The colonial government supported the education of the sons of kings and chiefs, groomed for ruling positions²³. Bishop Streicher's educational report of 30th June, 1910, indicated that Lubaga School was founded for the sons of chiefs and other promising Catholic boys to prepare candidates for chieftainship and clerical work within the administration²⁴. Also, they wanted to minimise

²¹ N. Thiongo, *Decolonizing the mind: the politics of language in African literature*, London, Currey, 1994, p. 45.

²² P.L. Van Den Berghe, *Education, class, and ethnicity in Southern Peru: revolutionary colonialism*, in P.G. Altbach, G.P. Kelly (edd.), *Education and the colonial experience*, New Brunswick-London, Transaction Books, 1984, pp. 181-203.

²³ S.M.E. Lugumba, J.C. Ssekamwa, *A history of education in East Africa*, Kampala, Fountain Publishers, 2002, p. 25.

²⁴ White Fathers' Archives (from now on cited as: WFA), C.13, Henri Streicher, educational

costs and avert the possible danger of arousing nationalism among the masses. Kumar observed that such a school system mirrored the British schools based on 18th Century English political ideas, which consisted of Bourgeois individuality, equality and security of property²⁵. The implication was that by controlling the educational system the traditional ruling class had been able to preserve its power. A similar programme was upheld in British colonies to train a small number of property holders. As such it appears to suggest that one of the objectives of colonial education in Uganda was to divide and weaken the subjects, by making them subordinate to their rulers. Education was therefore meant to facilitate the ultimate goal of political domination, economic imperialism, and social subjugation.

The rising tide of sectarianism in Uganda was brought about by missionaries; this was witnessed in the pattern and structure of their schools. Although these schools were all founded by missionary bodies, Catholic missionaries did not allow Catholic converts to attend Protestant schools and vice versa. This view was expressed in the words of Bishop Streicher, when he encountered Mr. Tomkins, sub-Commissioner at Kampala, who had communicated to him his plan to make sixteen year olds to spend a year's apprenticeship at a technical school, he replied as follows:

As soon as the Government Protectorate opens a technical school, under the direction of European or Indian teachers, paid by the Government, and unconnected with missionary work, our Catholic youth will be happy to be admitted to it and will attend its courses assiduously. But so long as there are in Uganda technical schools of the kind founded at Namirembe by the Church Missionary Society, a school under the immediate and exclusive control of the Protestant Mission, I shall feel bound as a Catholic Bishop to continue to forbid my converts to attend it²⁶.

This showed that the White Fathers forbade Catholic children from mingling with Protestant children in schools. Similar remarks were also extracted from the printed conclusions of the synod of 10th October 1909 and 3rd October 1913, respectively; they indicated the White Fathers' stance forbidding Catholics from attending the Protestant hospitals and even any use of their literature²⁷. This pattern, therefore, revealed that education was viewed at a denominational level. Professor Low concluded by stating that: «if born of Protestant parents, and therefore baptised in the Protestant church, an aspirant was educated at a Protestant school, and thereafter found himself a member of the Protestant

report, 30th June, 1910.

²⁵ K. Krishna, *Political agenda of education a study of colonialists and nationalist Ideas*, New Delhi, Sage Publication, 2005, p. 23.

²⁶ Rubaga Archives Kampala (from now on cited as: RAK), F.22, report on educational progress of White Fathers in Uganda, 1902.

²⁷ RAK, F.22, Synodaux number 392-3, 593-622: 55-59 and 75-94, 1909 & 1913.

political party»²⁸. From the close observation of this study what Professor Low said of Protestants equally applied to Catholics. This also suggested that some of the major political parties in Uganda continue to reflect the major religions that Ugandans fall into. It equally reflected that much as religion can enhance national identity, it can also be used instrumentally to cause conflicts in much the same way as others have analyzed the instrumental role of ethnicity in conflict. There is no doubt that the seed of sectarianism in Uganda was planted by the missionaries. This rivalry created unhealthy relationships leading to unseemly behaviour like discrimination in society, the promotion of people in the offices of the civil service was done on the basis of religious affiliations. The Christian teachings which were supposed to promote love and unity among the people were used to promote mutual enmity between one another. This attitude of the missionaries towards one another was in sharp contrast with the gospel message. This suggests that although education was a source of a positive move in the direction of progress, it was also a source of conflict and division.

In 1925 the British Colonial administration, which had established itself gradually from 1894, finally assumed an active role in education. They formed a partnership with the missionaries and adopted the policy of running schools through the missions. In the same year the Department of Education was established in order to coordinate and provide financial support to the churches' educational activities whilst increasing state control over education. They further supported the missionaries' work whilst seeking to change the focus of education: it encouraged primary schools to emphasize technical training over literacy education in order to serve economic interests²⁹. In the same year the British developed a document education policy in British tropical Africa. Its aims were to adapt education to the local environment, to strengthen the feeling of responsibility among tribal communities and to raise moral standards³⁰. This meant that the common policy running through all the versions of adapted education was an emphasis on 'industrial education'. This idea originated from the British Privy Council of Education in 1847 regarding 'coloured education', which stated need for «securing better conditions of life and development of the African as a peasant on the land»³¹. In general terms this meant manual work. The concept of 'adapted education' was not only visible in the philosophy of British education, but was also in the curriculum, in textbooks and in the content

²⁸ D.A. Low, *Political parties in Uganda 1949-1962*, London, Athlone Press, 1962, pp. 11-12.

²⁹ Ssekamwa, *History and development of education*, cit., p. 27.

³⁰ Colonial Office, *Education Policy in British Tropical Africa: Memorandum submitted to Secretary of State for Colonies by Advisory Committee on Native Education in British Africa Dependencies*, London, His Majesty's Stationary Office (from now on cited as: HMSO), Cmd 2374, 1925.

³¹ Brief practical suggestions, on the mode of organizing and conducting day-schools of industry, model farm schools, and normal schools, as part of a system of education for the coloured races of the British Colonies, *Foreign and commonwealth Office Collection*, London, 1847.

and methods of teaching in all the subjects, especially history and geography³². Such an educational system was put in place to justify the aim of colonial – mission education, which aimed at building character and teaching good manners, and promoted loyalty to masters as it emphasised manual work³³. Hattersley, the pioneer of Church Missionary Society Elementary education in Uganda had confirmed that the process of civilising the nation would be incomplete without the formation of the Christian character³⁴. In this way, by focusing on agricultural and manual training, adapted education resulted in preventing Ugandans from pursuing life outside their rural environment. This makes it clear that with the emergence of the colonial administration in the field of education, the Ugandan graduates were not suitably trained to address Ugandan challenges to the development and improvement of their citizens' welfare. They were rather to become intermediaries in advancing colonial rule and moral education through labour. This further manifested that the interest of the missionaries in Uganda was centered not so much on intellectual training and growth, but rather on moral education.

As part of their divide-and-rule policy, the British implemented policies to increase the influence of local ethnic groups on missionary education. For example, the Thomas Education Committee of 1940 reviewed Uganda's education system and made recommendations which eventually led to the adoption of policies that increased local control over education. The system of a Board of Governors was established in order to promote local involvement in school administration and in local governments who were given the responsibility over the financing of primary education³⁵. This support for the enhancement of ethnic identity runs parallel with the colonial regime's other policies that increased hostilities among the different ethnic groups of Uganda. By encouraging the indigenous people to remain as fragmented ethnic groups, the colonial regime implemented educational policies to prevent the Ugandans from identifying and collaborating with each other to oust the colonizers.

The colonial regime further divided Uganda into administrative provinces and districts, each representing the dominant ethnic group of the region that would act as the local government and extension of colonial rule. In the education sector there was similar alignment: the Director of Education and his assistant, who operated at headquarter through provincial education officers, whilst at the district level there was the District Education Officer, who worked closely with the District Commissioners in each district. The district encompassing the

³² A.I. Madeira, *Portuguese, French and British discourses on colonial education: Church-State relations, school expansion and missionary competition in Africa 1890-1930*, «Paedagogica Historica», vol. 21, n. 1/2, 2005, pp. 31-60.

³³ A. Wandira, *Early missionary education in Uganda: A study of the purpose of the missionary education*, Kampala, Makerere University Press, 1972, p. 45.

³⁴ RAK, F.21, education meeting held on 13 April 1894.

³⁵ WFA, C.13, education report of the year ended 31st Dec 1940.

Buganda Kingdom's geographical domain of rule became the centre of colonial administration, while the other districts were brought under colonial control through the Baganda chiefs³⁶. On the other hand, the members of ethnic groups in the northern region, such as the Acholi and Langos, were considered as skilled warriors, and were recruited for positions in the police and the army³⁷. This indicated that army officers were recruited along ethnic lines and on the basis of physical strength, rather than on educational criteria. This inequality based on selection process, created problems later on for Uganda as those who dominated the military there after controlled the politics of Uganda. The British education policies deliberately discouraged the formation of unified nationals and patriots among the indigenous people. As a result, most students retained a strong identity with their clans and even those who went to the mission schools remained loyal to their ethnic roots. Twaddle observed that even at the demand for independence, the students at the State Run University at Makerere worked to progression towards decolonisation through university associations linked with their ethnic backgrounds³⁸.

It was Lugard who invented the British policy of indirect rule in Africa, a policy that attempted to govern Africans through their own 'native authorities' at its face value this system suggested that there was a reciprocal benefit here, in that the natives to have responsibility for themselves, and in that it further reflected the British values of liberty. However, scholars like J. Comaroff and L. Comaroff argued that the British colonial rule used indirect rule rather than direct rule because it made it easier for them to dispossess the indigenous people of their land, extract labour and legitimize their subordination³⁹. In short, the motive behind this system was to sustain tribal identities and continuous confrontation with their neighbours as they extracted land from them. Indeed far from the supposed objective, this encouraged local people to remain as fragmented ethnic groups, and such policies were meant to prevent Ugandans from identifying and collaborating with each other. It was therefore, a political strategy whereby, the traditional leaders were used as an instrument to curb political and social unrest.

The government also continued to support missionary education to alter aspects of ethnic identities in order to bring them into line with British and Christian values. For example, Ado revealed that in the mission schools,

³⁶ B. Charles, *African education: A study of educational policy and practice in British Tropical Africa*, Oxford University Press, 1953, p. 61.

³⁷ E.A. Brett, *Neutralising the use of force in Uganda: The role of the military in politics*, «The Journal of Modern African Studies», vol. 33, n. 1, 1995, pp. 129-152.

³⁸ H. Dinwiddy, M. Twaddle, *The crisis at Makerere University*, in H.B. Hansen, M. Twaddle (edd.), *Uganda now: between decay and development*, London-Athens, J. Currey-Ohio University Press, 1988, pp. 195-204.

³⁹ J. Comaroff, J.L. Comaroff, *Of revelation and revolution: Christianity, colonialism, and consciousness in South Africa*, Chicago University Press, 1991, p. 45.

children were not only taught catechism and knowledge of the Bible, but they were also repeatedly told that Ugandan customs and traditions were wrong and unacceptable to the 'new God'⁴⁰. Moreover, Ssekamwa pointed out that the colonial-mission schools taught about European personalities like Speke who discovered the source of the River Nile, but not about Ugandan heroes. They taught European history, not Ugandan history⁴¹. Various research studies based on this Eurocentric view have firmly claimed that there was only European history in Africa and that the rest was darkness. According to Zachernuk remarked:

That until about 1950s those whose opinion on the study of the human past mattered, held firmly to the view that Africa had no history before Europe made contact with her, and that even with the coming of Europeans to Africa one would still not talk of African history properly so called, but of the history of European activity in Africa⁴².

This implied that Africa and indeed Uganda was a dark 'Continent' with no history. This view however, contrasted sharply with the early pedagogical activity in ancient Africa. Rodney observed that in Egypt, there were different educational systems; one was for the scribes and the other for the priests and that they taught many subjects, in addition to reading and writing⁴³. This supports the idea that the African process of education was transmitted throughout the continent before the advent of the missionaries and the colonial powers. Missionary, colonial education gave a negative image of Ugandan traditional education to Ugandans. Okoth of Uganda asserted that the colonialists concentrated on the process of negating the personality, identity and dignity of the colonized people⁴⁴. Agbiboa concurs with Okoth as he argued that ethnicity persisted because it was used as a mechanism for adaptation to the imperialist system to ensure effective dominance over the colonized⁴⁵. While this assertion may be true to a large extent, it was not applicable to all Ugandans. For example, from an educational point of view these discussions revealed that Buganda enjoyed considerable advantages, because the early missionaries concentrated more in Buganda than in any other region. Although, some Baganda adopted Christianity and chose to wear Western clothing, they nevertheless, managed to maintain their Buganda identity. For example after attending the missionary

⁴⁰ Ado, *Missionary teachers as agents of colonialism*, cit., p. 35.

⁴¹ Ssekamwa, *History and development of education*, cit., pp. 169-170.

⁴² P.S. Zachernuk, *African history and imperial culture in colonial Nigerian schools*, «Journal of International African Institute», vol. 68, n. 4, 1998, pp. 484-505.

⁴³ W. Rodney, *How Europe underdeveloped Africa*, Washington D.C., Howard University Press, 1982, p. 240.

⁴⁴ P.G. Okoth, *The creation of dependent culture*, in J.A Mangan (ed.), *Imperial curriculum: racial images and education in the British colonial experience*, London, Routledge, 1993, pp. 134-145.

⁴⁵ D.E. Agbiboa, *Ethno-religious conflicts and elusive quest, for national identity in Nigeria*, «Journal of Black Studies», vol. 44, n. 1, 2012, pp. 3-30.

schools some Baganda wrote about Buganda emphasizing their own pride about their culture, including their own history⁴⁶. However, in 1948 the attitude towards education changed and a memorandum for responsible citizenship was signed and it stated that:

His majesty's government has often proclaimed that responsible self-governance is the goal at which all colonies should aim. The central purpose of the British Colonial administration was to pledge to guide the colonial peoples along the road of self-governance within the framework of the British Empire, to build up their social and economic institutions, and to develop their natural resources⁴⁷.

This meant that self-governance was the aim which all economic and social development, and particularly the development of education, should have in view. In this regard education for responsible citizenship meant that there were some ideals to be followed in order to educate the Ugandans along this line. For example at primary level, the ideal required to promotion of certain subjects like: history and geography. Meanwhile at the secondary level there was an introduction to democratically run societies in order to break autocracy, which led to the development of clubs and societies in schools. Debates were promoted at secondary schools in view aimed at inculcating the young citizens against the common deception of argument and propaganda. This would help them to scrutinize the documentations, which had emotional contents⁴⁸. The question arises as to why the British suddenly changed their tone to focus on education for citizenship. Was this education different from other colonial programmes? Some scholars argue that the British changed their tone to ensure their colonial influence by placing educated Ugandans, who remained loyal to the colonial power. One thing which is clear from this study is that British government policies on Ugandan education could not possibly have been designed to go against colonial interests. They were formulated in the interest of the British colonial office by colonialists without involving one single Ugandan. Pearce noted that the statement of July 1943, made by Oliver Stanley, Colonial Secretary of the State, when he pledged «Britain to guide colonial peoples along the road to self-government within the framework of the British Empire», had a note of insincerity and unreality in his declaration: it was very much designed for international consumption, to appease American critics of British imperialism, and Oliver himself doubted that the majority of the colonies would ever be capable of full self-governance⁴⁹. It is therefore evident that the policies which governed the development of education in Uganda between 1925 and 1961

⁴⁶ J. Roscoe, *The Baganda: an account of their native customs and beliefs*, London, Frank Cass, 1965, p. 78.

⁴⁷ Ssekamwa, *History of education development*, cit., p. 164.

⁴⁸ *Ibid.*, p. 164.

⁴⁹ R. Pearce, *The colonial office and the planned decolonization in Africa*, «African Affairs», vol. 83, n. 330, 1984, pp. 77-93.

were not intended to promote the interest of Ugandans. The motive behind the promotion of education for citizenship, would guide the domestic policy along lines supportive of the society's dominant, social and economic interest⁵⁰. This suggested that the reforms in the Ugandan educational system were conceived and implemented within the framework of this relationship. Although, there was a lot of enthusiasm on the part of the Ugandan public, there were nevertheless, strings attached to this educational programme.

In conclusion, the fact that education is meant to make a real difference in life by instilling knowledge, skills, attitudes, and values into students, who can use these assets to gain a higher status in society, this was to some extent under-valued by both the colonial administration and the missionaries. The Western educational system undoubtedly helped in creating and maintaining the colonizing system, with its glaring disparities and inequities structured along lines of ethnicity, culture, and class.

The study has documented that the form of adapted education was as result of the fear of colonial officials, who believed that new Ugandan leadership would endanger their existence. In this sense, by focusing on agricultural and manual training, adapted education was restricted in limiting Ugandans to pursue life within their rural environment. Consequently, the British government kept within the scope of the education system it desired. It should however, be noted that within these limits, its education was quite productive. By emphasising the study of agriculture (manual labour), hygiene, and the strong moral values, the teachers and their pupils were instilled with awareness of their local environment and good discipline. Moreover, by establishing higher education colleges, it raised highly educated Ugandans. However, only a small number of students attended such schools. This restrictive factor was later to create tensions in the Ugandan society.

It should nevertheless, be noted that even if the missionary educational activities left much to be desired, they ought to be viewed on the merit of their own time and circumstance. We cannot therefore, attribute all the present problems in Uganda to the failings of missionaries and the colonial educational system without considering the environment they were working in. It should however, be acknowledged that such contemporary problems date back to the colonial past.

⁵⁰ E. Berman, *Foundations, philanthropy and neo-colonialism*, in P.A Gail, P.K Gail (edd.), *Education and colonial experience*, New Brunswick & London, Transaction Books, 1984, pp. 253-256.

3. *Education during post-colonial Uganda*

Uganda regained independence from the British on 9th October 1962, under the leadership of Milton Obote as Prime Minister and Kabaka Edward Muteesa II (King of Buganda) as the President. During the colonial period and the early period after independence Buganda as a Kingdom enjoyed considerable autonomy from the rest of Uganda and this almost took on the shape of a state within a state. In 1966 Obote overthrew Edward Muteesa II, and changed the constitution to enable him to become the president of Uganda⁵¹. Unlike Kenya and Tanzania, Uganda did not gain its independence through a nation-wide movement that unified the indigenous people against their common oppressor.

Obote's priority was to use education as a pillar to consolidate the national sovereignty of the country, to foster unity among the masses and to produce wider human resources capable of transforming society and safeguarding national ideals and beliefs. The new Ugandan government also pursued the Africanization and the nationalization of the school curriculum⁵². Just as traditional education continued to reinforce ethnic identity at the family level, and the missionary education continued to promote the Christianization and Westernization of local ethnic identities. So now, the post-colonial state sought to bring Ugandan and African identity to the fore by revamping the Anglo-centric curriculum to suit the needs of the Ugandan people. Nyerere of Tanzania noted that although educational policies had often been motivated by political views, during the post-colonial period most African leaders were more concerned with promoting education for the purpose of national identity and integration⁵³.

In 1963 Uganda appointed the Castle Education Commission to review the educational system in Uganda. The recommendation of this Commission provided the framework for reform, which also involved public participation through written memoranda. In this way, the curriculum and other aspects of the educational system became stronger or more relevant to the challenges of the time⁵⁴. In 1964, the education act was passed and all the grant aided schools which belonged to religious groups were nationalised by the state. By doing so, this government control was meant to offset any further grip of the missionary and racial segregations and paved the way for greater unity under national unity⁵⁵. Once under government control, the schools were prohibited from

⁵¹ E.A. Brett, *Neutralising the use of force in Uganda: The role of the military in politics*, «The Journal of Modern African Studies», vol. 33, n. 1, 1995, pp. 129-152.

⁵² W.S. Kajubi, *Education for national integration and development: Report of education review Commission*, Ministry of Education, Kampala, 1974.

⁵³ J. Nyerere, *Freedom and development*, Dar-es Salaam, Government Press, 1973, p. 56.

⁵⁴ *Ibid.*

⁵⁵ Ssekamwa, *History and development of education*, cit., p. 170.

barring children of the local area, who were not of the same race or religion, from attending their school.

Also, 1973 saw the dawn of curriculum reform, which was meant to unify the curriculum and inculcate the formation of national identity⁵⁶. In spite of the reforms in education, the progress made in the promotion of national ideals was slow and insignificant. It suffered a setback due to the political chaos, civil strife, and economic stagnation that engulfed the country during the regimes of Idi Amin from 1971 to 1979 and Obote, from 1981 to 1985. Amin eventually fell out with Obote on 25th January 1971 while Obote was out of the country attending a Commonwealth Summit. He staged a coup d'État as far as a change of government was concerned. Ethnicity became more pronounced as Amin recruited for the army his own tribesmen from North Western Uganda – the Kakwa, at the expense of the Acholi and the Langi who had dominated the army during Obote's tenure⁵⁷. The infrastructure of educational institutions was run down and the country lost most of its trained manpower⁵⁸. Besides, the Bantu speaking people of the south and the non-Bantu of the north continued to struggle for power. Scholars attribute the failure of democratization in African countries to the strength of ethnic identity. Horowitz argues that the more ethnically divided a country is, the more difficult it is for democratization to succeed. Since in his view, the democratic system encouraged inclusivity and excluded ethnicity⁵⁹. It is thus clear that the new Ugandan leadership could not use diversity as a source of their strength.

All in all, these conflicts reflected that the 19th Century nationalistic attitude in Uganda fostered the sense of ethno-cultural superiority for fear of insecurity from both within and without. It also manifested that the leaders at the time were not equal to the task intellectually; politically and morally, hence, independence was seen as a concession for the purpose of tribal grouping, instead for unification.

It can further be noted that decades of self-rule and independence have not succeeded in empowering Ugandans to determine their educational framework. In part, this difficulty was/is as a result of the continued social and economic ties between Uganda and its former colonising powers. Although, Uganda was/is politically independent, it remains technologically and economically dependent on countries that colonised it. During both the Obote and Amin regimes educational structures were meant mainly to foster this bond, rather than reduce it. For such reasons they did not go far enough to develop and

⁵⁶ *Ibid.*

⁵⁷ Brett, *Neutralising the use of force in Uganda: The role of the military in politics*, cit.

⁵⁸ I. Karinjabo, *Curriculum Development and Educational Innovations: The problems of quality and relevancy in Ugandan Secondary Schools*, Doctorate in Sciences of Education, Faculty of Science of Education, Roma, Pontifical Salesian University, 1995.

⁵⁹ D.L. Horowitz, *Democracy in divided societies*, «Journal of Democracy», vol. 4, n. 4, 1993, pp. 19-25.

foster a common culture. Under the current president Museveni however, the education system is trying to take on different direction.

4. Under the Umbrella of the National Resistance Movement: Education for National Unity

In 1986 Museveni took over from Milton Obote II. The country was tattered by the effects of colonialism, and post-colonial mismanagement. People were largely illiterate, culturally diverse and divided on religious grounds. In contrast to the Obote and Amin regimes, Museveni's government took steps to increase access to education with the enhancement of national identity as a central objective. He advocated for broad-based policy to encourage the inclusion of all Ugandans, regardless of ethnicity, ideology, or previous political affiliation. The ten point program of the NRM (National Resistance Movement) is the defining document of Museveni's regime, which includes the consolidation of national unity through the elimination of all forms of sectarianism⁶⁰. This clearly demonstrated that through the nationalisation of education, and the call to national unity, the government of Uganda fosters the development of a well-defined national identity and reduced its citizens' previous allegiance to ethnic groupings.

In 1997 and 2006 the government, supported by international donors, made tremendous strides towards achieving a universal primary and secondary education. The government has taken responsibility for providing and administering a standardized nationalized education for Ugandans throughout the country. Thus far, remarkable progress has been made in the area of education in terms of increased access, equity, and quality. One such area is the democratisation of education, inclusive of female students through funding, advocacy, and affirmative action. In fact most educated women in Uganda feel empowered and are able to make their voices heard in contrast with traditional laws and customs⁶¹. Today some of these women participate actively in various matters of national issue at parliament

In a bid to promote science and technology, policies have been adopted aimed at encouraging boys and girls to venture into information and technology. According to the recent report, 25 years of nation building and progress in Uganda from 1986 to 2011, people's access to the telecommunication sector has increased to 86% in terms of geographic coverage. Consequently,

⁶⁰ Report on 25 years of nation building and progress in Uganda from 1986-2011, <www.statehouse.go.ug/.../files/departments/25.years.2.pdf> (accessed: September 21, 2014).

⁶¹ Ministry of Education and Sports, development of education in Uganda in the Last Ten Years: the 46th Session held at Geneva, May, 2001, <<http://www.ibe.unesco.org/International/ICE/natrap/Uganda.pdf>> (accessed: October 21, 2014).

the advancement of hi-tech has increased communication within different ethnicities, thus enabling exposure to national issues and to a call for collective responsibility where need arises⁶².

In promoting national unity and eliminating all forms of sectarianism, citizenry education known as chaka-mchaka was introduced to all graduating senior six students of secondary schools. Chaka-mchaka education included self-defence training and political education. This education was especially meant to create awareness of the national consciousness and the need to defend it. This move however, was opposed by the opposition parties and some human rights observers, who viewed it as political indoctrination⁶³. Although heavily criticized by opponents of the ruling government as a tool of political indoctrination, chaka-mchaka education helped raise national consciousness and facilitated the formation of a coalition among various ethnic groups in southern Uganda against northerner rule.

Grooming young people to fulfil their civic duties to the nation necessitates fostering a spirit of national pride. In Uganda unlike other nations like Britain and the United States of America, schools teach civic education as a separate subject to inculcate national values and patriotism⁶⁴. On the other hand, Uganda use history lessons at higher and social studies at lower levels. Currently, elements of Ugandan civic education have been incorporated into the primary schools' social studies curriculum. This curriculum attempts to promote democratic values and ideas of a national Uganda, as opposed to ethnic identity. The syllabus of social studies for primary schools at fourth to seven level, are designed to enlighten the pupils on matters both local and national leadership. It also discusses the influence of foreigners, the formation of Uganda and postcolonial Uganda⁶⁵.

Meanwhile, the history of Uganda for form one to four (high school) students is taught how to promote and appreciate the value of national unity and patriotism⁶⁶. So far, education has remained the cornerstone of the NRM's efforts towards national integration.

In Uganda however, no national language exists, which could unite all Ugandans. English is spoken as the official language, but many people in Uganda especially the elderly do not speak English thereby limiting communication across the different ethnic groups. With Swahili being spoken widely in Tanzania and Kenya, Uganda will have, but limited option to popularise and

⁶² *Ibid.*

⁶³ P. Bouckaert, *Hostile to democracy: The movement system and political repression in Uganda*, New York, Human Rights Watch, 1999, p. 66.

⁶⁴ J.J. Cagan, 'Civic education in United States': A brief history, «International Journal of Social Education», vol. 4, n. 1, 1999, pp. 52-64.

⁶⁵ Telephone interview to department of education Kyambogo University, Uganda on 22 January, 2014.

⁶⁶ *Ibid.*

effect Swahili in their educational system since the leadership in Uganda seems to be very interested in reviving the idea of regional integration in East Africa⁶⁷. In doing so, Kiswahili language, will help to a great extent to weaken ethnic identity and strengthen national unity.

Whilst a great effort has been undertaken to promote national identity, there are still some loopholes in the curriculum where no mention whatsoever is made of its conflicts-ridden post-independence history. Despite the prominence accorded to national unity in the curricular objectives, Ugandan schools do not provide a glorious national narrative about the unification of the different ethnic groups into one nation in a joint struggle against colonialism, as compared to Kenya's Mau Mau's struggles for self-independence. Students are taught that the Ugandan nation was a product of the colonial rule. Surprisingly however, the curriculum barely touches on the History of post-colonial Uganda after independence, for example Amin's brutal rule is virtually left untouched and taught. Additionally, teachers do not detail the current President Museveni's rise to power through guerrilla warfare against his opponents and its impact on the nation. This is in stark contrast for example with Germany, who after World War II, revisited issues of its historical past during the Nazi regime to accurately portray the brutality of its regime toward minorities. By so doing, they reduced the bias associated with their History curriculum by incorporating more perspectives about the country's violent past into its national narrative⁶⁸. The importance of such study of common experiences of the past bonds people together and creates a feeling of community and eventually closes some gaps by means of a reconciliation. In addition to sharing these past experiences, people share the present and future as they move forward together as a group. By pushing such past experiences under the carpet is to perpetuate the conflicts, which could easily be resurfaced from time and again.

Conclusion

This article attempted to demonstrate the different forms of the educational system in Uganda, and how diverse actors used education to manipulate different identities as far as national identity was concerned. Notably, traditional education manifested that members of the group were bound together by the values, beliefs, and ideals associated with the groups' identity. The mission-

⁶⁷ B.O. Oduor, *Prospects of Kiswahili as a Regional Language in a Socioculturally Heterogeneous East Africa*, «Journal of International and Intercultural Communication», vol. 1, n. 4, 2008, pp. 327-347.

⁶⁸ E.A. Cole, *Teaching the violent past: History education and reconciliation*, Review by Alan Sears, «British Journal of Educational Studies», vol. 50, n. 4, 2008, pp. 488-490.

colonial education used the method of divide-and-rule policy, which pitted indigenous ethnic groups against each other in their pursuit of the social and economic advantages offered by the colonial bureaucracy. This clearly reveals that the colonial policies served to increase competition among different ethnic groups. In part, because of this colonial legacy of division, Uganda and many countries in sub-Saharan Africa have suffered from internal fragmentation and conflict. This suggests that when knowledge is introduced by an external actor and imposed on an education system of a particular society, it becomes biased and has a negative influence on the indigenous knowledge of the people.

The study manifested that the missionaries shifted sides by co-operating with the colonial power in promoting this form of education. The fact that they did so, was a clear indication that the missionaries had compromised with their Christian message. It has been shown that religion is another defining aspect of identity that some authors have argued can be used instrumentally to prosecute conflicts in much the same way as others have analyzed the instrumental role of ethnicity in conflict. Moreover, this study has fully revealed that the development of the colonial educational system was related to the historical orientation of the Western economic, political and cultural transmission, which was at the centre stage for the missionaries and colonial government. Due to their limited ability to meet their own ends however, the missionaries and the colonialists had to follow the ideals prevailing in their home countries.

After independence however, the state-sponsored nationalized education gained greater influence over the youth. This study revealed that a comparison of interethnic and international relations in Uganda during the Obote (1966-1971, 1980-1985) and Amin (1971-1979) years and under the current President Museveni's regime (1986-present) illustrates how the Museveni regime's strong commitment to national unity along with the promotion of universal education has enhanced Ugandans' sense of citizenship and national identity and reduced the occurrence of ethnic conflict in the country.

The system as a whole has increasingly become more open and inclusive. Although, Uganda has made significant strides in promoting a national identity and citizenry spirit, challenges like tribalism have persisted, which reflects that the end of colonialism did not completely bring about the end of ethnic divisions, thus posing challenges for national integration.

Also, manner of authoritarian rule not marked by openness, transparency and accountability are likely to water down the above efforts. Finally, the oral histories of ethnic groups still remain hanging in a dilemma, whilst the post-colonial brutal history with references to power struggles between different factions is hardly covered in the current curriculum. This study has however, shown that greatly fragmented ethno linguistic groups, can gain a path to nationhood through education as a unifying tool for all citizens under its rule of law.

The construction of the Basque Fatherland: religion, nationalism and education (1895-1931)*

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ABSTRACT: A key problem in and for the history of Spain is the construction of its national identity. In this constructive process, the political and ideological goal of Basque nationalism was the creation of an independent State, following a pattern of identities where religion, Fatherland and language – in that order – were fundamental elements. The school and the teaching profession were fundamental agents in this process. The period under study here is that coinciding with the rise of Basque nationalism until the Second Spanish Republic, one in which we can understand the ideological structure of Basque nationalism: made up of patriots, members of religious orders and speakers of the Basque language.

EET-TEE KEYWORDS: School; Nationalism; Nationalization; Educational Policy; Religious Education; Language Teaching; Spain; Basque Country; XX Century.

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Introduction

One of the conflicts that currently still exist in Spain is that caused by the non-recognition by the Spanish State of Spain as a plurinational and plurilingual State. Catalonia, the Basque Country and, to a lesser extent, Galicia, are historic and linguistic realities that have, over the years, found their niche within the Spanish State¹. The Constitution of 1978, with the creation of the «State of the Autonomous Regions» aimed to resolve this question, granting all the autonomous communities «privileges» that were thought to have been reserved for these historic nations. Nevertheless, over recent years, and especially in the educational field, already 17 educational systems corresponding to the number of existing Communities could be spoken of, due to the powers devolved from the State in educational matters. This current situation had its roots in the process of construction of the Spanish educational system and the role that has been played by the various nationalisms; particularly Spanish, Basque and Catalan ones². In the field of the history of education there exists abundant bibliography about the construction of national identity and its relation to education³.

The objective of this article is to show how Basque nationalism based its discourse on religion as the fundamental premise around which Basque national identity would be constructed. For Sabino Arana, founder of the Basque Nationalist Party (PNV) in 1895, the Basque Fatherland would only make sense if it was orientated «to the greater glory of God» (AMDG), paraphrasing the motto of the Jesuits. Based on this premise, one can understand other substantial themes of Basque nationalism, such as the Fatherland, race or the language. Despite the permanence of the original discourse of Sabino Arana, in the second part of this work we analyse the contributions of other ideologues of Basque nationalism – after the death of the founder –, noting continuities and ruptures in this discourse. In opposition to this ideological position were its declared enemies – secularism, Spanish nationalism and the Spanish language. But as these enemies had no life of their own other than that which their transmitting agents (the school, teaching staff, text books, etc.) could give them, the targets of attacks by Basque nationalism at the beginning were to be precisely these

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¹ R. López, M. Cabo (edd.), *De la idea a la identidad: estudios sobre nacionalismos y procesos de nacionalización*, Granada, Comares, 2012. This work includes important contributions on theoretical aspects of nationalism and the processes of identity referring to the Spanish case.

² P. Dávila, *Las políticas educativas en el País Vasco durante el siglo XX*, Madrid, Biblioteca Nueva, 2004.

³ In the monographic section of issue 27 (2008) of the «Historia de la Educación» journal, entitled *Educación y construcción de las identidades nacionales*, there exists abundant bibliography and case studies on the topic.

players. The representative schema of this nationalism follows the canon of any nationalist ideology: choosing a viable world that enabled emphasising one's own identity, interpreted in terms of positive values, and confronting another world, inhabited by the enemy and with its negative values.

This architecture of nationalist representation had a relevant importance in the educational field, as this was the element which would sustain the national construction of Euzkadi (neologism created by Sabino Arana). Euzkadi was a nation made up of the seven territories in which Basque was spoken (four depending to the Spanish State and three in the French Republic), and for which the players were to be Basque patriots, under the auspices of Catholicism, that is, the territory historically known as Euskal Herria (literally, the land of the Basque language)⁴. The analysis of Basque nationalist ideology in this article is focused on written texts by Sabino Arana describing a political-religious doctrine that has lasted almost unaltered since its inception up until the 1970s. After the Spanish Civil War (1936-1939) the PNV went into exile and did not resurface on to the political scene until the death of the dictator Franco. The emergence of radical nationalism in the 1960s, led by ETA (Euskadi and Freedom), marked a rupture with these positions, on focusing its discourse on the importance of the language in order to construct an independent Euskal Herria. Consequently the PNV had to adapt its discourse to the new reality, without losing sight of its traditional one.

But Basque nationalism did not involve itself solely in the field of discourse but, when it gained some measure of power, locally or at a provincial or national administration level, it strove to put into practice these principles through educational experiments (creating Basque schools (*ikastolas*), training Basque teachers and creating school texts in Euskera). In short, what Basque nationalism discovered, as with other nationalisms, is that the school is the best agent for the processes of nationalisation, although not the only one.

1. *Sabino Arana – architect of the Basque Fatherland (1895-1903): «For God and only for God»*

Most conservative nationalisms resort to religion as a fundamental principle of their system of ideas and beliefs. The same occurred in the case of the Basque Country, if we consider the principles of the founder of the PNV, Sabino Arana Goiri⁵. This credo is summed up by the motto «Jaungoikoa eta Lege Zarra»

⁴ In this text the names *Euskal Herria*, *Euskadi*, *Euzkadi* or *País Vasco* are employed indistinctly to refer to all the geographical territory in which Basque is spoken.

⁵ Sabino Arana (1865-1903) went through three distinct phases throughout his life. The first from 1893 to 1898, marked by intense political radicalism and religious fundamentalism; the second until 1902, when he became close to the industrial bourgeoisie of Vizcaya; and the third,

(God and Ancient Laws)⁶. For Arana religion was the central pillar around which the construction of the Basque Fatherland turned, as is well explained by the ideologue of nationalism, Aranzadi, after the death of the founder: «for him religion was everything»⁷. In this sense Arana placed religion at a superior level, being «a religious mission»⁸ that the PNV was destined to fulfil. Thus, the end goal aimed at by nationalism was to Christianise all of Euskal Herria: «my patriotism is not based on human motives, nor is it aimed at material ends: my patriotism is founded on, and each day that passes is founded on my love for God, and the end pursued therein is that of guiding towards God my brothers and sisters of the same race, my grand family – the Basque people»⁹.

In this sense, Basque nationalisms are based on the umbilical connection between the Basque Fatherland and God, expressed in a nutshell with the motto «Gu Euzkadí rentzat ta Euzkadi Jaungoioa´rentzat» («We for Euzkadi and Euzkadi for God»), a Messianic message also detected in other political parties, although not necessarily Christian¹⁰. But the ideas of Arana only continued a long tradition of the Church in the Basque Country. The role of religion has been anchored in Basque society since the Catholic Counter-Reformation, to the extent that being Catholic and Basque were perceived as the same, this equivalence giving rise to one of the most frequent clichés regarding the Basque people¹¹. Thus, Arana perceived in political terms a widespread and traditional Catholic reality¹² and, in this way, could closely connect to a Catholic fundamentalism that constituted the fundamental pillar for the legitimization of his political ideology¹³. This traditionalist ideology, manifesting itself in various political parties and levels, would play a role as a cohesive element of a society going through a crisis of values and transformations that was the industrialisation which occurred at the end of the XIX century in the Basque

in the last year of his life, in which a shift to Spanish nationalism is observed. He was the founder and ideologue of the Basque Nationalist Party and President until his death.

⁶ During the Middle Ages the Basque provinces had special administrative privileges or rights («fueros») that lasted until 1876 in some cases. After the Second Carlist War (1872-1876) this ‘fueros’ re-emerged with the aim of recovering these rights and the motto of which was «Jaungoikoa eta Foruak» (God and Our Rights). C. Rubio, *La identidad vasca en el siglo XIX: discurso y agentes sociales*, Madrid, Biblioteca Nueva, 2003.

⁷ E. Aranzadi, *Sólo por Dios*, «Euzkadi», 20th November 1930.

⁸ J.C. Larronde, *El nacionalismo vasco. Su origen y su ideología en la obra de Sabino Arana Goiri*, San Sebastián, Txertoa, 1979, p. 79.

⁹ S. Arana, *Tres Cartas*, La Patria, 12th January 1902.

¹⁰ F. García de Cortazar, J.P. Fusi, *Política, nacionalidad e Iglesia en el País Vasco*, San Sebastián, Txertoa, 1988, pp. 69-70.

¹¹ J. Caro, *Los vascos*, Madrid, Itsmo, 1971, p. 268.

¹² F. Letamendia, *Euzkadi, Pueblo y Nación*, San Sebastián, 7 vols., Kriselu, 1990, vol. 1, p. 172.

¹³ F. García De Cortázar, *La iglesia vasca. Del carlismo al nacionalismo (1870-1936)*, in J.C. Jimenez de Aberasturi (ed.), *Estudios de Historia Contemporánea de País Vasco*, San Sebastián, Haranburu Editor S.A., 1982, p. 219.

Country¹⁴. In this context, Arana longed for a mythified tradition that was out of place and time¹⁵.

Within his nationalist ideology, a required union between «Euzkadi» and Catholicism would be established, with the aim of Christianising Euskal Herria. The political project that underpinned Sabino Arana was that of a confederated Basque State, based on the unity of the race and Catholic unity¹⁶. Victory for national liberation makes sense if this contributes to the victory of religion¹⁷. As Arana himself stated «the cry of independence HAS BEEN HEARD ONLY BY GOD»¹⁸. Thus, the fundamental features of Arana's nationalism (independence, Euskera, defining the Basque nation, etc.) is directly connected to religion: God and Fatherland make one¹⁹, and the Fatherland must be subordinated to God: «I proclaim Catholicism for my Fatherland, because its tradition and its political and civil nature is essentially Catholic; if this were not so, I would still proclaim it; but if my people resisted, I would deny my race; without God we do not want anything»²⁰.

With this ideological approach it can be understood that, carried by this zeal, both liberalism and Spanishism were targets of attack for Arana, as both were against the work of God. This attitude connected liberalism and Spain in such a way that both came to be considered enemies of Euskal Herria²¹. Liberalism, as understood by Arana, was an atheistic and anticlerical ideology and a «sin». The freedom that it defended brought moral degradation and secularisation and, in consequence, the situation of domination that religion suffered from. If this was unpardonable in itself, it was more so coming from the hand of the Spanish.

It can be understood in this context, thus, the reaction against the «maketo» (racist expression against anything Spanish and linked to immigration caused by industrialisation)²². Anything Spanish was the reflection of the many evils

¹⁴ L. Castells, *Modernización y dinámica política en la sociedad guipuzcoana de la Restauración 1876-1915*, Bilbao, E.H.U.-U.P.V./Siglo XXI, 1987, p. 6.

¹⁵ J. Juaristi, *El bucle melancólico: historias de nacionalistas vascos*, Madrid, Espasa Calpe, 1997.

¹⁶ J.L. De la Granja, *Sabino Arana: de creador de los símbolos de la nación vasca a símbolo del nacionalismo vasco*, in López, Cabo (edd.), *De la idea a la identidad: estudios sobre nacionalismos*, cit., p. 16.

¹⁷ García de Cortazar, Fusi, *Política, nacionalidad e Iglesia en el País Vasco*, cit., p. 66.

¹⁸ S. Arana, *Efectos de la invasión*, «Baserritarra», n. 11, 1897.

¹⁹ J. Corcuera, *Orígenes, ideología y organización del nacionalismo vasco 1976-1904*, Madrid, Siglo XXI, 1979, p. 320

²⁰ S. Arana, «*Discurso de Larrazabal*» (1893), en L. de Guezala, *El pensamiento de Sabino Arana y Goiri a través de sus escritos*, Bilbao, Partido Nacionalista Vasco, 1995.

²¹ A. Elorza, *Ideologías del nacionalismo vasco*, Zarautz, Itxaropena, 1978, p. 134.

²² Corcuera comments on this phenomenon: «there exist objective conditions such that autochthonous sectors of a population that has grown disproportionately consider that an authentic 'invasion' has taken place». Corcuera, *Orígenes, ideología y organización del nacionalismo vasco 1976-1904*, cit., p. 81.

causing the lack of religiosity. As a consequence, on mixing with the Spanish, the Basques were losing their virtues. Thus, in the view of Arana, «amongst the morass of terrible scourges afflicting our beloved Fatherland, none is more terrible and afflictive [...], as our children being in contact with the children of the Spanish nation»²³. This is why independence was the only path to save Euzkadi and guarantee the Catholic religion.

1.1. *Attack on liberal education*

Within this discourse, under the auspices of God, the educational question is present, based on the criticism that nationalism makes of two central themes: the liberal education system and Spanish teaching. And within this educational field, the pedagogic goal feeding the Aranist discourse is the following: «young people well educated for God and for the Fatherland»²⁴. As regards the first question – the Spanish educational system – the very fact that it was liberal means it was an enemy of God and beholden to «secular or freethinking schools», meaning that the training thereby received by young Basques was harmful to them. It is true that the educational system was liberal, but there also existed a Concordat, signed with the Vatican in 1851, that maintained certain privileges for the Church. Nonetheless, Arana understood that, in this regard, the Church was relegated to the State.

In any case, the State guaranteed the education of the Christian doctrine in the schools and reserved the last word over what was to be taught in the schools²⁵. The State was liberal and so denied obedience to God. Arana was not the only one to see things as such – in the Congress of Spanish Deputies, Campi3n²⁶ railed against liberalism as he believed it would bring terrible consequences: masonry would ensconce itself in educational fields, there would be heresy in the universities and High Schools, and in text books, schools, and so on. Arana knew perfectly well that public education was not secular and he would praise the work carried out by the Church-run schools, given that it was these that guaranteed a fundamental (i.e. Christian) education.

Arana apparently defended the independence between State and Church, arguing that men of the Church could not participate in politics. Nonetheless, he stated that the State should always be subordinated to the Church. As this

²³ Arana, *Efectos de la invasi3n*, cit.

²⁴ S. Arana, *Educaci3n moderna*, «Bizkaitarra», 25th January 1895.

²⁵ A. Vi3nho, *Confesiones y educaci3n religiosa en la escuela p3blica: tradiciones hist3ricas y situaci3n actual en Espa3a*, in J. Pintasilgo (ed.), *Laicidad, Religi3es e Educa3o na Europa do Sul no S3culo XX*, Lisboa, Universidade de Lisboa, 2013, pp. 255-276.

²⁶ A. Campi3n, *Discurso en el Congreso de los Diputados el d3a 24 de Mayo de 1893*, in *Discursos Pol3ticos y Literarios por Arturo Campi3n*, Pamplona, Imprenta y librer3a de Erice y Garc3a, 1907, pp. 72-79.

was not, in fact, the case, Basque children were condemned to fall into the clutches of the «maketos» or «philomaketos», given that the schools were in their hands: «Yours is our people [...] yours our sons and daughters in the schools»²⁷. The figure of the schoolmaster that Arana described approaches this idea of the «possession» of Basque schoolchildren. It is precisely the schoolmaster who is presented in Arana's discourse as the main target for his attacks and as the didactic embodiment of all the evils emanating from the liberal and Spanish school.

1.2. *The schoolmaster – agent of 'Spanishization'*

The second theme underlying Aranist thinking on the educational question is the role of teaching. Spanish domination, in Arana's view, has the schoolmaster as the fundamental protagonist within the framework of the school. The reaction that the Spanish educational system provoked in him occurred because he believed that the essence of all that was defective about what was Spanish was the figure of the master. The attacks on the «foreign» schoolmaster were radical in the discourses of Arana, although the fueros (territorial rights) had referred to the presence of a teaching that was alien to the traditions and language of the Basque Country. In other words, the schoolmaster was to be the priority objective of Arana's attacks on who was considered as a soldier in the invader army of the State²⁸.

Thus, and within what we can refer to as a simple schema, Arana believed that the welfare of the people had three fundamental pillars: the priest, the doctor and the schoolmaster. Arana took it that the doctor and the priest «fulfilled» their function, but not the schoolmaster, because he was a person alien to the country, and who «sought to infiltrate into the hearts of children a hatred for our Fatherland and scorn for Euskera»²⁹. What was more, «it is not the Spanish government that orders Euskera and the 'Euskerian' race to be destroyed so that this people [...] cannot lift up their heads, but it is the schoolmasters in our schools that seek this end»³⁰. In this sense, the schoolmaster is not a submissive agent, but consciously labours in favour of Spain. Thus the foreign schoolmaster hits directly at the heart of the personality of the Basque children through his teachings³¹. The attitude of Arana with respect to the schoolmaster is clear: «it

²⁷ S. Arana, *¡Au da aukera!*, «Bizkaitarra», 31st March 1895.

²⁸ P. Dávila, *La profesión del magisterio en el País Vasco, 1857-1930*, San Sebastián, UPV-EHU, 1994. In an analysis of Basque Teacher Training of this period, it can be shown that a high percentage of schoolteachers came from provinces adjoining the Basque Country, given that the open public examinations for teaching posts emanated from Valladolid, which was the capital of the university district.

²⁹ S. Arana, *Causas del mal*, «Bizkaitarra», 25th July 1895.

³⁰ S. Arana, *Nuestros maestros*, «Bizkaitarra», 30th November 1894.

³¹ S. Arana, *La protesta Pedagógico-maketil*, «Bizkaitarra», 17th February 1895.

is necessary for us to see the maketo schoolmaster as one of the fiercest enemies of our beloved Fatherland»³². Beyond prejudices, Arana would make sure to interpret things in a political context and point to the fact that the schoolmaster, being a «maketo», was an evil in itself, when referring to morality and religion: «Basque-speaking children being schooled by maketo schoolmasters not only politically harmed Vizcaya, but equally seriously harmed religion and morality amongst the Bizkainos»³³.

Arana realised that this situation required a solution, as to continue along this path; Euskal Herria would lose God, Euskera, the race, its national character, and the virtuous beliefs and customs of the Basques. The question was asked whether the Church schools might be able to provide a solution. Arana's response made subtle caveats: Do not the Church schools have «maketo» schoolmasters? The submission of Arana to the Church reached such extremes that he refrains from referring to «maketo» schoolmasters in the confessional schools, at least explicitly. It could be thought that, in exorcising the ghost of liberalism, these schoolmasters, even while being «maketos», worked with the goal of training young people for God and, in this sense, there should be no reason for attacking them (given that they were guaranteeing a Christian education). Nonetheless, he aims a mild criticism at education of doctrine in Spanish: «we could ask in which school run by priests is teaching doctrine in Spanish carried out for Basque speakers who have learnt Euskera in their childhood?»³⁴.

1.3. *Confessional schools for an independent Euskadi*

To conclude with the arguments regarding the educational question, the logical consequence of the discourse of Arana would be to create a confessional educational system within the framework of an independent Euskadi. However, we found no manifestation of Arana expressly formulating this proposal. In fact, in the rules of what was the first batzoki (a local social and political centre for Basque nationalists), we can find this interesting and clarifying article: «Bizkaya will be established on a complete and unconditional subordination of the political to the religious: of the State to the Church»³⁵. This complete subordination and without conditions would mean that any kind of educational policy would be reverential and submissive to the Church. The confederation that, in the nationalist vision of Arana, the Basque territories would have to construct, would not therefore have anything more than an educational framework of

³² S. Arana, *Carta de un Maestro*, «Bizkaitarra», 17th February 1895. It would seem that Arana limited himself to publishing a letter written by a schoolmaster, but we have serious doubts about its authenticity and we would venture to say that the author was Arana himself.

³³ S. Arana, *A los maestros*, «Bizkaitarra», 17th February 1895.

³⁴ S. Arana, *Epilogo*, «Bizkaitarra», 31st December 1894.

³⁵ *Estatutos del Euskaldun Batzokija*, Art. 6.

a confessional nature, with no room for any kind of secular school which, in itself, places the complete Christianisation of Euskadi in danger.

Nevertheless, this independence, and the break with this liberal Spain, would not resolve the problem of contact with the Spanish that live in Euskal Herria. We imagine, following Arana, that there would be an independent Euskadi and that the dream of an educational system of a confessional nature would be beyond reality. If the dangers that liberalism and secularism entail were to disappear, the star of God would be the only one illuminating the sky over Euskal Herria. But no: Spanish residents in the country would cause to rupture this species of «mystical harmony» about which Arana appeared to dream; because «it's well known» that the Spanish are not easily permeable to Catholicism. The best solution, according to Arana, is to segregate the Spanish «as foreigners, to be always isolated from natives in [...] worship, associations, education, customs and friendship, and relations»³⁶.

This isolation of those who are of a non-Basque race would also be applied in the field of education. It is true that Arana argued in favour of a confessional education, but he did not offer any kind of precise explanation as to how this separate development would be put into practice. Would special schools be created? If so, under whose control would they be – the Basque State that he envisaged – and how would such control of such schools be managed? Would they be included within the framework of a hypothetical Basque educational system or be side-lined? What is certain is that, from the point of view of hard proposals, Arana's ideas were extremely weak. On the one hand, and spurred on by a vehement Catholicism, he strongly attacked the liberal school, for being liberal and Spanish (an enemy of God, therefore). On the other, inspired by the defence of religion, and within the political objective of independence, there would only be room for a school of a confessional nature (because politics, including educational policy, had to be subordinated to religion)³⁷. Finally, it cannot be said that he considered an educational system for all of Euskal Herria, but that he called on the unity of Basques to create Basque schools³⁸.

Even when Arana put forward the need to structure a national Basque educational system, it should be underlined that the idea never went beyond a generalised formula; any clear signs of true political will in this sense were not present. He simply limited himself to pointing out the advantage of creating Basque schools, that being such they would necessarily have to be staffed by

³⁶ Arana, *Efectos de la invasión*, cit.

³⁷ As pointed out by Luis Arana – brother of and inspiration behind Sabino – the hypothesis of a non-confessional State from the perspective of «Jaungoikoa eta Lege Zarra» would be «the height of aberration», and in fact the history of the PNV in its first decades did not give credence to formulating such a hypothesis (L. Arana, *Formulario de los principios esenciales o básicos del primitivo nacionalismo vasco contenidos en el lema Jaun-Goikua eta Lagizarra*, Abando-Bilbao, Artes Gráficas Grijalmo S.A., 1932, pp. 46-47).

³⁸ S. Arana, *Regeneración*, «El Correo Vasco», 11th June 1899.

and enrol patriots (and, thereby, Christians). What, in our view, behoves us to see how exaggerated his position was on secular schools, knowing now that they had little significant presence in the Euskal Herria of his time. Nevertheless, although the secular school was practically non-existent, his attacks can be explained in a purely ideological context, aspiring to have effects in the political field: he would have a formidable excuse, another weapon, to concentrate all his energies against liberalism and against the Spanish State.

2. *State and Church at the beginning of the XX century (1903-1930)*

The death of Arana in 1903 opened the doors to two processes: the first, linked to the nationalist discourse, which would be adjusted over the years until the Second Republic (1931-1939), and the second, the expansion of the PNV in a political context of modernisation, transforming itself into a modern movement of masses. As we are analysing Basque nationalist ideology from an educational perspective, we are not going to refer to the political achievements of Basque nationalism during the first third of the XX century, that concluded with the approval of the Statute for the three Basque provinces and a coalition government presided by the PNV³⁹. In this context, nationalism spurred a series of educational experiments overseen by its own ideology: schools in poor neighbourhoods (1919-1938); Basque schools controlled by the Basque association of women, and so on⁴⁰.

This situation occurred within a Spanish context in which two processes emerged: the growing presence of the State in education and the latter position of the Church in developing united action⁴¹. The position of the State became structured from the beginning of the XX century, with the creation of the Ministerio de Instrucción Pública (1900) and the development of basic tenets regarding the educational system: extending the school age, changes in primary

³⁹ E. López Adán, *Nacionalismo vasco y clases sociales*, San Sebastián, Txertoa, 1976; L. Mess, *Nacionalismo vasco, movimiento obrero y cuestión social*, Bilbao, Sabino Arana Kultur Elkargoa, 1992; S. De Pablo, L. Mess, *El péndulo patriótico: historia del Partido Nacionalista Vasco (1895-2005)*, Madrid, Crítica, 1999; J.L. De La Granja, *El nacionalismo vasco: un siglo de historia*, Madrid, Tecnos, 2002.

⁴⁰ G. Arrien, *Educación y Escuelas de Barriada de Vizcaya (Escuela y autonomía 1898-1936)*, Bilbao, Diputación de Vizcaya, 1987; P. Dávila, *Las políticas educativas en el País Vasco en el siglo XX*, Madrid, Biblioteca Nueva, 2004.

⁴¹ P. Dávila, *Las órdenes y congregaciones religiosas francesas y su impacto sobre la educación en España. Siglos XIX y XX*, in J.M. Hernández, *Ensayos sobre las influencias francesas en la educación española e Iberoamericana*, Salamanca, Universidad de Salamanca, 1989, pp. 124-169; P. Dávila, L.M. Naya, *La enseñanza privada religiosa en España: instituciones, políticas e identidades*, in Pintasilgo (ed.), *Laicidad, Religiões e Educação na Europa do Sul no Século XX*, cit., pp. 367-392.

education curriculum, reforms in the teacher training colleges, teachers' pay, reforms in secondary education, the imposition of Spanish in the education of the Christian doctrine, etc. All this with a political instability between 1902 and 1923, when there were 32 presidents of government and 53 ministers of Instrucción Pública⁴². But the most relevant question was the anticlerical measures of the liberal governments, considered as hostile enemies of the Church. Against this policy the data was quite clear as regards the religious orders dedicated to education given that, of the religious communities existing in 1923, 56.59 per cent of the congregations of men dedicated themselves to education, while only 35.14 per cent of women devoted themselves to this end⁴³.

As regards the unified action of the Church, this was to develop in the face of political secularism, throwing off its traditional isolation⁴⁴. The Church then began to organise on the basis of Congresses and, above all, with Acción Católica which, from 1903 on, began to bring together the forces around its prelates and outstanding personalities in Catholicism, such as the Marqués de Comillas⁴⁵ and which, with the passing of time, would constitute a movement for the defence of the Church and for the decided Catholic right to organise the masses⁴⁶. The appearance of Catholic circles or unions of a Catholic bent, complemented this complex organisation of the Church, and which would also be complemented with other kinds of organisations, amongst them being the Federación de Amigos de la Educación in 1930⁴⁷, in which a number of clerics belonging to religious orders and congregations played an important role.

2.1. *Basque nationalism and the religious problem*

Looking into the internal workings of nationalism from 1903 until 1930, it can be said that the legacy left by Arana was confusing. A number of different tendencies can be detected, although all of them sought to follow

⁴² M. Puelles, *Educación e ideología en la España contemporánea*, Barcelona, Labor, 1986.

⁴³ Dávila, *Las órdenes y congregaciones religiosas francesas y su impacto sobre la educación en España. Siglos XIX y XX*, cit., p. 101.

⁴⁴ V. Faubell, *Educación y órdenes y congregaciones religiosas en la España del siglo XX*, «Revista de Educación», Núm. extraordinario, 2000, pp. 137-200; B. Bartolomé (ed.), *Historia de la acción educadora de la Iglesia en España*, Vol. II: *Edad Contemporánea*, Madrid, Biblioteca de Autores Cristianos-BAC, 1996.

⁴⁵ W.J. Callahan, *La Iglesia católica en España (1875-2002)*, Barcelona, Crítica, 2003, pp. 100 and ff.

⁴⁶ F. Montero, *Del movimiento católico a la Acción Católica. Continuidad y Cambio*, in J. De La Cueva, F. Montero, *La secularización conflictiva. España (1898-1931)*, Madrid, Biblioteca Nueva, 2007, pp. 169-186.

⁴⁷ C. Labrador, *Federación de Amigos de la Enseñanza*, in D. Delgado (ed.), *Historia de la Educación en España y América*, Madrid, Morata/SM, 1992, Tomo III, pp. 823-826; A. Viñao, *Escuela para todos: educación y modernidad en la España del siglo XX*, Madrid, Marcial Pons, 2004.

the «schoolmaster» (Sabino Arana). All this was due to the ideological confrontation for the control of the party. The defenders of independence and home rule began a heavy battle but which did not end in a split. Nonetheless, it has to be pointed out that the renovation of structures and the creation of a wide network of organisms were to remain practically unchangeable in the first two decades. This allowed the party to become a modern movement of masses, taking a pragmatic line, both on the ideological plane as the organisational. In this sense, leaving aside ideological disputes, the clear commitment in favour of achieving a statute of home rule has to be stressed, expressing itself as a bourgeois and moderate nationalist project⁴⁸.

In this period, the PNV, which arose as a Catholic body, would maintain this character after Arana's death. It was Catholic with regard to faith and also in its party members. This fervent Catholicism went beyond the area of beliefs, not tolerating any non-confessional or secular perspective. The attempts to create the Partido Nacionalista Liberal Vasco, the Partido Nacionalista Republicano Vasco or the Unión Federal Nacionalista Republicana turned out to be absolutely sterile⁴⁹. In few words, Basque nationalism is either Catholic or it is no Basque nationalism. The patriot party is confessional or, if not, it is not worth being considered nationalist. What is more, the non-confessional party that aimed to appear nationalist, besides being an enemy of religion, was also an enemy of the Fatherland.

In this sense the legacy of Arana remained immaculate and the religious question was taboo within Basque nationalism. A clear example of this is the work *Ami Basque*, a book of a doctrinal character in the form of a catechism, and also used in a number of schools, where it was proclaimed: «God comes before the Fatherland [...] The prime duty, the capital duty of a nationalist Catholic is, thus, to maintain their Fatherland in the knowledge of Christ, through the subjection to the authority and the teachings of the Church»⁵⁰. Thus, a position of nationalism submissive to the Church is observed. There was no margin for vagaries of any kind; no place to be tolerant and the attitude of the party had to be necessarily inflexible, with a «radical exclusion of any heresy, any schism, any rational or liberal spirit, of any non-Catholic cult, of any public or official tolerance towards error»⁵¹.

Thus there existed a clear harmony with the master», now dead. The manifestations of the principal actors of Basque nationalism make up a continuous rosary in the defence of Catholic orthodoxy. Standing out in this sense is the figure of Aranzadi, ideological protagonist of nationalism after the death of Arana, with whom he maintained a devoted conformity: the «master»

⁴⁸ De Pablo, Mess, *El péndulo patriótico*, cit.

⁴⁹ Mess, *Nacionalismo vasco, movimiento obrero y cuestión social*, cit., pp. 123-353.

⁵⁰ E. Ibero, *Ami vasco*, Bilbao, Imp. De E. Arceche, 1906, pp. 23-24.

⁵¹ *Ibid.*, p. 42.

was a «perfect Basque» because he was a «perfect Christian»⁵². In his view, the religious question was and always is the fundamental one, the only thing that really interests man: «God first, above all that exists, above all things, above the Fatherland of the Basques. Then, subordinated to God, is Basque nationality»⁵³. The spirit of Arana remained alive and the nationalist movement transformed into a religious one: «the mission of the Basque nationalists is to save the people for what God wished us to form part of, save them from national dissolution and save them from Latin impiety, and for the reintegration of their rights for being racial – always identifying with Catholicism»⁵⁴.

Effectively, «for God only» could be understood as Arana's cry for liberty. In this sense, Aranzadi did not allow for the possibility of being able to think otherwise, and patriots would have to staunchly defend this principle, at the risk of being accused of being fanatics⁵⁵. Nonetheless, the examples of intransigence were seen in all walks of life: «horrendous blasphemy», the «wanton abandonment» that sullies public life, the «lewd» dances⁵⁶; all a product of the «Latin impiety» that was the enemy of Christian religion and morals and that poisoned the «clean habits and customs» of the Basques. All this occurred, according to the new ideologues of nationalism, because of the existence of socialism, atheist republicanism and liberalism⁵⁷.

2.2. *The enemy of the Basque Fatherland: the phantom of the secular school*

On the ideological plane, nationalism committed to being a confessional party, but also to being a confessional Euskadi. This proposal meant a combative attitude against secularism that was also reflected in education. Thus, a clear line of continuity with Sabino Arana's founding proposals is seen. It is easy to conclude that Basque nationalists were in favour of confessional education. In general, it can be said that Basque nationalism rebelled from the moment when the State showed any sign of enacting laws that affected religion⁵⁸. For example, the presence of Basque nationalism against the Bill on Religious

⁵² Aranzadi, *Sólo por Dios*, cit., p. 170.

⁵³ *Ibid.*, p. 172.

⁵⁴ Also Eleizalde, to highlight one more example, while not talking of religious organisation, believes – after underlining the theistic nature of what is Basque, Christian and Catholic – that the political-social doctrine of Basque nationalism should be based on Christian doctrine (L. Eleizalde, *Cuatro conferencias*, Bilbao, Editorial Vasca, 1918, p. 21).

⁵⁵ *Ibid.*, p. 174.

⁵⁶ E. Aranzadi, *La unidad de fe y la nacionalidad vasca*, «Euzkadi», 30th August 1916.

⁵⁷ E. Aranzadi, *Ante todo y sobre todo*, «Euzkadi», 8th August 1916.

⁵⁸ As reflected in the manifestations of a discourse that in its day achieved great social resonance «*Jaungoiko gabeko, Jaungoikuaren kontrako eskolak badatoz*» («Godless schools are coming, the schools against God»). Cf. J.B. Larreta, *Las Escuelas Láicas. Jaungoikorik gabeko eskolak*, San Sebastián, Est. Tip. De «El Pueblo Vasco», 1910, p. 12.

Associations presented in the Cortes (Spanish Parliament) by the State in 1906, when the PNV joined various Catholic forces (Carlists, fundamentalists, etc.) and in the context of which the clergy played a fundamental role of social mobilisation⁵⁹. We must remember that the anticlerical crisis that the French State went through (1901-1905) would have powerful consequences in the Basque Country⁶⁰. Although it cannot be said that it was a mere reflection of this⁶¹, the consequences were to be felt on this side of the frontier.

In this context of secularisation, Euskal Herria lived through a period of conflict, where the presence of nationalists was felt in an outstanding way. Basque nationalists participated in the defence of religious congregations, although not jointly with the rest of the political forces of the right⁶²; or they adopted a passive attitude when involved in those acts organised against the secular school⁶³. Clear evidence of this is in the very intense press campaign deployed against the secular school. In the view of Basque nationalism, it is in the school that the fundamental reasons for falling out of God's «grace» are found, as can be appreciated in the following verses published in Bizkaitarra:

Where are the clean customs / of this beautiful Euskal Herria, / where are the men of peace / where are the wonderful laws? / Just mentioning this and my eyes / are filled with copious tears; / because the peoples that were doing well / are now not at all well; / we lived in peace / in the grace of God; / amongst Basques / There was not the confusion of today. / But since the devil has insinuated himself / amongst the angels / there has been no good / in our beloved Euzkadi⁶⁴.

Basque nationalists adopted a moralising attitude towards the spectre of the secular school. To this end, and with a very clear didactic proposal, a number of different situations and scenes were used. For example, who would say they were in favour of secular schools? Answer: the drinking father who spends his time in the socialist tavern. In this line, fear was one of the most valued weapons of the nationalist press, a weapon which, in our view, is a measure of the ideological perspective of Basque nationalism at the time: «Look what your secular school has brought upon us! / – The education of liberty / – Of freedom

⁵⁹ L. Castells, *Modernización y dinámica política en la sociedad guipuzcoana de la Restauración 1876-1915*, Madrid, UPV-EHU/Siglo XXI, 1987.

⁶⁰ Dávila, *Las órdenes y congregaciones religiosas francesas y su impacto sobre la educación en España. Siglos XIX y XX*, cit.

⁶¹ Y. Turin, *La educación y la escuela en España de 1874 a 1902*, Madrid, Aguilar, 1967, p. 331.

⁶² Castells, *Modernización dinámica política en la sociedad guipuzcoana de la Restauración 1876-1915*, cit., p. 273.

⁶³ Mess, *Nacionalismo vasco, movimiento obrero y cuestión social*, cit., p. 101. Mees appreciates, referring to the thesis upheld by Castells, the difference between the Basque nationalism and the other right-wing forces.

⁶⁴ *Jaun-Goikoa eta Euzkadi*, «Bizkaitarra», 23th January 1909.

for evil. / Liberty for the perdition of the young; / The perdition of our children; / the perdition of families»⁶⁵.

Socialism was, in or view, the real reason that gave rise to fears amongst Basque nationalist circles. The complicated political situation of the time obliged the liberal governments to give way, limiting their aims of secularising education and stepping back from control by the State. As regards Euskal Herria, private education enjoyed stupendous health, compared to the practically inexistent problem of the secular school⁶⁶. Apart from reasons of an ideological nature, it has to be understood that the provision of education by religious congregations adapted perfectly to urban contexts, quite capable of responding to demands from disparate social sectors⁶⁷. That is, Basque nationalism – and the political right in general – not only defended confessional education for ideological principles; but also because the provision was completely satisfactory. It can also be seen that there was concern about the education that the working class would receive directly. Thus, secular schools could favour the flourishing of the revolution; while Christian education aimed at the working classes could put an end to socialism. Thus, and while not being dependent on nearby events, nationalists would remind us of the benefits of the school of Ferrer i Guardia⁶⁸ in order to highlight the harm that the secular school causes. According to the nationalists, nothing justifies the existence of these schools which were contrary to faith and incited the lack of beliefs in the hearts of the children. Accepting them would be an insult to the honour of Catholics.

In any case, Basque nationalism denounced that the risk of secular schools was one of a political nature. The right defended the principle of freedom of education against the monopoly that the State was trying to impose and, in this sense, the position of Basque nationalism was similar to that of the parties of the Spanish right. Nonetheless, there was an element that marked out the difference: the belief that secularism found its *raison d'être* within the framework of the law, in Spanish laws that regulate education and which caused a problem in Euskadi that was not of their making. That is, the Spanish educational system and the State made possible the unthinkable – the loss of religiosity in education. In this sense, Belaustegigoitia drew no difference between liberals and conservatives, as Spanish politicians had a clear aim: to conquer and assimilate the Basques, which labour would be effected through a centralised education aimed at the

⁶⁵ E. Aranzadi, *Escuelas laicas*, «Bizkaitarra», 2nd March 1910.

⁶⁶ M. Ostolaza, *Entre religión y modernidad*, Leioa, Universidad del País Vasco, 2000.

⁶⁷ This thesis can be contrasted in the following works: A. Yetano, *La enseñanza religiosa en la España de la Restauración (1900-1920)*, Barcelona, Anthropos, 1988; P. Davila, L.M. Naya, H. Murua, *Bajo el signo de la educación. Cien años de los Hermanos de la Salle en Gipuzkoa*, San Sebastián, Hermanos de las Escuelas Cristianas. Distrito de Bilbao, 2009; Ostolaza, *Entre religión y modernidad*, cit.

⁶⁸ P. Solà, *Ferrer Guardia, pedagogo y hombre de acción: la mirada apasionada de Alban Rosell sobre el fundador de la escuela moderna*, Barcelona, Clavell Cultural, 2011.

death of the ethnic, social and political personality of what is Basque. With this end in mind, all the Governments of the State were taking steps aimed at absolute control, at the monopoly over education, this being a fundamental arm for the strengthening of the State itself. The attitude of the State is transparent for Basque nationalism: centralisation to ensure control of education in order, amongst other objectives, to take firm steps «towards secularist monopoly». As can be appreciated, and as Belaustegigoitia himself referred to, hovering over this discourse was the fear of what was happening in France at the time, and the possibility of something similar happening in the peninsular Basque Country⁶⁹.

What was at stake was a determined way of understanding the principle of freedom of education. The Spanish liberals and radicals defended liberty of education, demanding the right of schoolmasters to defend positions contrary to the doctrine of the Church. Nevertheless, all that could be questioned regarding the State – textbooks, educational content, etc. – had to be subject to the strictest control. That is, in the name of freedom of education, the State defended the liberty of teaching, making it clear that the doctrines of the Church did not have an untouchable status. However, there was no place for the freedom of teaching when the State was involved; when the «constitutional regime» that imposed the hegemonic position of the State was attacked. Meanwhile, Basque nationalism defended the principle of liberty of education, meaning it did not tolerate that the doctrine of the Church could be called into question. In Belaustegigoitia's opinion, the monopoly of education by the State was completely irrational, whatever State was involved and thus, this same position would be defended in the hypothetical case of a Basque State.

2.3. In favour of a Basque school: the Basque language (Euskera) and religious education

The position of the PNV at this time, with regard to education, was clear: defending any kind of school in which Basque and religion were taught, given that Spanish laws in educational matters had pernicious effects. For such a situation there was a solution: «intelligent and organised patriotism»⁷⁰. That is, the recipe was as follows: Basque nationalism and a well organised nationalist movement to act as a bulwark against falling into the nets of the Spanish right, or into that of the Spanish Church.

It is our view that this perspective is worth highlighting, especially because it enables responding directly to the question: is there a reason for drawing a difference between Basque nationalism on the one hand and, on the other, the

⁶⁹ F. Belaustegigoitia, *Las leyes españolas sobre la enseñanza y Euzkadi*, «Euzkadi», 5th July 1918.

⁷⁰ *Ibid.*

Spanish political right and the Spanish Catholic Church? In our view, Basque nationalism, within the schools' system, made another demand – the defence of Basque was a basic defining element of the Basque personality and the safeguard of Basque religiosity. Euskera was the temple-refuge of the Catholic faith. The attitude opposing Euskera of the Spanish political forces, including Catholic ones, was well known. Thus, from the religious perspective, it was a source of harm and the damage to the Basque language was very deep. But, in the field of education, what was the role that the Church played, given that it was the main guarantor of the faith? Belaustegigoitia could not have been more clear: «the majority of schools that we can see today are prejudicial for Euskera; both the enemy government (of little faith), as well as those schools created amongst us, whether dressed in red, white or even the colour of the priest's cassock»⁷¹.

Nor white nor red – Spanish or Spanishist political forces –, nor the clergy either. Within the framework of the State, the Church acted as if it were Spanish and in this sense its lack of responsibility was terrible. It is true that Basque nationalism often favoured schools belonging to religious congregations and defended the right to support the clergy, in the name of the need for a Christian education, first and foremost; and, secondly, making an issue of the principle of the freedom of education. The PNV considered two fundamental tenets when defending this position: on the one hand, its intransigent Catholicism for ideological reasons; and, on the other, the intensification of its confrontation with the State. Basque nationalism was in favour of the Church, but only when it did not manifest itself as Spanish. The PNV was submissive to the Church in as much as the latter was the representative of God on Earth. In this sense, the difference between the attitude towards the Church of Rome – absolute submission – and that which Basque nationalism showed to the Spanish Church should be stressed. It accepted the authority of the latter provided it did not go against the faith – in short, it was Rome who set orthodoxy as regards the faith.

From this perspective the PNV was contrary to many of the schools in the hands of religious orders – those that went against the Basque personality, and also because they went against Christianity, although perhaps unconsciously. This situation, Basque nationalism denounced, was fairly widespread in Euskal Herria and examples were not lacking that bore witness to a veritable persecution which can only be regarded as reprehensible: persecuting the Basque language is persecuting the faith. Basque nationalists expressed their dismay and surprise many times: «not a few religious communities continue in their incomprehensible labour of bringing down the sanctified wall of defence of the still profoundly religious Basque popular conscience»⁷². The schools, that had had such an excellent welcome in Euskal Herria – on many occasions

⁷¹ F. Belaustegigoitia, *Euskerazko Eskolak, in Lenengo euskalegunetako itzaldiak*, Bilbao, Euzko-Argitaldaria, 1921, p. 109.

⁷² F. Belaustegigoitia, *Persecución indigna*, «Euzkadi», 4th March 1916.

thanks to help from Basque nationalists –, did not show the least minimum sign of Basquism.

Bustinza, Basque nationalism ideologue and defender of Euskara, was critical of the Church and the position of many religious congregations with regard to Euskera. Thus, for example, the Marists, besides being enemies of the Basque language, were doing a disservice to the faith of Basque speakers on obliging the pupils to learn Spanish, including the Christian doctrine⁷³. The same could be said of those brothers that made use of punishment with the ring (symbol of the repression of Euskara)⁷⁴ or, in general, those elements belonging to the Church that undervalued, perhaps due to fear of Basque nationalism, the importance that Euskera had from the perspective of religion, more so when many were Basque speakers⁷⁵. With the goal of stirring the conscience of the Basque clergy, Basque nationalists constantly called for reflection on the situation of the faith and the attacks on Euskera⁷⁶. Of course there were clerics who endeavoured to radically transform the situation; although it cannot be said that it was a phenomenon that was widespread. Basque nationalism deemed it essential to do the impossible so that (professional) Christians be aware of what was happening and thus have a key element in achieving the vital goal: bringing Euskera to the school in favour of Catholicism⁷⁷.

In this vein, we can highlight the schools of the Christian Brothers in Gipuzkoa for the presence of activities that defended a certain Basque identity. Thus, the Brother Visitor showed his concern at a number of schools attended by Basque-speaking children who did not know Spanish, and called for the Brothers to know Basque in order to educate Euskaldun pupils. From the 1930s on it began to be observed, not so much this kind of recommendation or observation that demonstrated the language situation, but the fact that classes were being taught in Basque – such as in the Escuela de los Ángeles in Donostia-San Sebastian, in Zarautz and also in Zumarraga. Besides these situations, we can also find examples involving the presence of a certain identification with Basque culture in out-of-school activities or in extramural ones within the school. In this sense, we see the day of Euskera was held in Zumarraga in 1931. But it was also more common to find that, at prize-giving ceremonies, or on the occasion of a visit to schools, poetry in Basque being recited, songs with a «Basque air» being sung, or Basque dance groups performing – all activities very particular to Basque nationalism.

Finally, in the field of the publication of books in Euskera, the De La Salle Brothers contributed to the creation of text books in Euskera to be used in their

⁷³ E. Bustinza, *Euskeraren arerioak* (22nd June 1915), in *Edo geuk edo iñok ez*, Bilbao, Labayru Ikastegia, 1915, pp. 114-115.

⁷⁴ Bustinza, *Oinatiko mutikoei*, in *Edo geuk edo iñok ez*, cit., pp. 141-142.

⁷⁵ Bustinza, *Euskal abadeak, zain!*, in *Edo geuk edo iñok ez*, cit., pp. 143-144.

⁷⁶ E. Bustinza, *El clero vasco y el Euzkera. Ejemplos y meditación*, «Euzkadi», 7th March 1916.

⁷⁷ Dunixi, *La instrucción religiosa del euzkeldun*, «Euzkadi», 22nd March 1918.

schools. In this sense, the Zumarraga School encouraged a number of Brothers to become involved in this task, the schools in Azkotia, Beasain and Zarautz also being involved⁷⁸.

In the following illustration, we can synthesise Basque nationalist ideology throughout the period of the study, and its relation with the Church and education.

Criticism of the Spanish Educational System	Defence of Basque Identity
Sabino Arana (1895-1903) <ul style="list-style-type: none"> • Ideological bases: <ul style="list-style-type: none"> - Defence of the Catholic religion (Feature of Basque identity) - Spanishization (the school and Teacher Training as agents) • Proposals: School for Basque patriots 	Moderate Nationalists (1903-1930) <ul style="list-style-type: none"> • Ideological bases: <ul style="list-style-type: none"> - Permanence of Arana's discourse - Pragmatic defence of Euskera • Proposal: Decentralisation of education and Basque schools.

Pic. 1. *The nationalist discourse in the first third of the XX century*

As can be observed, the ideological basis of Sabino Arana was based on criticism of the Spanish educational system, its teaching, etc. Against this, moderate nationalists did the same on the basis of the defence of Basque identity, based on religion and Euskara.

Conclusions

Within the nationalisms in Spain, the nationalist ideology held by the PNV had certain identifying features, such as the defence of the race, the Basque language and, above all, the Catholic religion. The founding father of this nationalism was Sabino Arana, who defended from the beginning the inextricable link between the Catholic religion and the construction of a Fatherland of the Basques. This position was so strong that it could not be understood in any other, dissociated way. In this way, the ideologue of Basque nationalism understood that the Catholic Church should be subordinated to the creation of a Basque State. As a consequence, there was a hierarchy where all values depended on this fundamental objective. This social representation played a role that binded the militancy of the PNV together, but also transmitted and spread a discourse that

⁷⁸ Davila, Naya, Murua, *Bajo el signo de la educación. Cien años de los Hermanos de la Salle en Gipuzkoa*, cit.

identified the keys of Basque national identity: the formation of a patriot in the service of the Catholic religion. Basque nationalism was based on a motto that was greatly loved by its card-carrying members: «for God and only for God». With this the idea was to cement political action based on the option of the Catholic religion.

Based on this basic premise of Sabino Arana, the pedagogic discourse gels, and follows the model of a political ideology, highlighting the positive values and rejecting or attacking the negatives elements that they opposed. In this sense, he proclaimed arguments in favour of the Christianisation of Euskadi and the construction of the Basque Fatherland and, against secularism and Spanish imposition, the transmitting agents being the liberal school and the «maketo» schoolmaster. From this analysis of the content of Arana's texts we have been able to observe two outstanding dimensions: the attacks on liberal education and the teaching profession, both inextricably linked given their Spanish origin. In this way, in the ideological drawing up of Sabino Arana's nationalism, these attacks and rejection were justified given that the targets were representatives of a Spain that criticised and placed obstacles to implementing the political project of an independent State.

The death of Sabino Arana did not deaden the rigour and strength of this discourse, but a moderate and pragmatic interpretation thereof arose, especially amongst those who had responsibilities in political positions. Nonetheless, the ideologues of nationalism maintained a discourse along similar lines. So, during this second stage the pragmatism of a moderate and continuous discourse can be observed. In this way the attacks against secular schools and the non-use of Euskera in education were two points of confrontation, as they did not favour the process of learning and the religiosity of the children. Nevertheless, the confessional schools that could also have undertaken the task proposed by the PNV were also object of criticism, as the teaching staff of these schools did not defend the education of Euskera. An exception is the case of the de la Salle Brothers who, towards the end of the period studied, became more decidedly involved in the defence of the Basque language and culture, drawing up texts and developing 'Basquist' activities.

Czechoslovak identity and history course books in the Czechoslovak Republic (1918-1939)

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ABSTRACT: The formation of states after the First World War in 1918 was justified by the idea of the distinct national identities of the created states. In the case of Czechoslovakia, being a multi-ethnic state, it was crucial to sustain the unity of the newly formed Czechoslovak statehood. Before – and naturally after – the foundation of the Czechoslovak Republic, the official ideology of *Czechoslovakism* took root in an attempt to proclaim national unity and point out that there was a Czechoslovak nation and Czechoslovak language, although no such language existed. The paper focuses on the Slovak part of the republic and explores the process of the building and strengthening of national identity in the context of the creation and use of history course books during the Czechoslovak Republic. The article surveys the legislation and offers detailed characterization of course book publication. As a case study, ‘Slovak’ history course books for secondary schools written by Czech historian Josef Peka are analysed.

EET-TEE KEYWORDS: Nationalization; Civics; Cultural Identity; History Teaching; Textbook; Czechoslovak Republic; Century XX.

Introduction

After the dissolution of the Austro-Hungarian Empire and with the foundation of the Czechoslovak Republic, two distinct school systems merged

into one. From the very beginning, there existed differences at all levels of the educational systems – for instance in the length of compulsory education, in the institutions of school administration, the language of education, content of school subjects and in other spheres¹. This paper explores the discourse on the building and strengthening of national identity in the context of the creation and use of history course books during the Czechoslovak Republic. The article surveys the legislation and offers detailed characterization of course book publication. As a case study, ‘Slovak’ history course books for secondary schools by Czech historian Josef Pekař are analysed.

1. *History course books after 1918 and major legislation*

The question of course books, and particularly the lack of proper educational materials in the Slovak territory, was a major problem of the early years of the new state. According to the Language Act n. 122/ 1920 (*Jazykový zákon 122/1920*), the official language in the Czechoslovak Republic was ‘Czechoslovak’ (*českoslovenčina*). However, Section 4 of the act stated that in the Czech, Morava and Sliezsko regions the language of administration should ‘usually’ be Czech and in the Slovak part ‘usually’ Slovak. While the option to use Slovak in official communication was thereby supported by law, preference for the use of the Czech language in practice was evident. This was determined primarily by the presence of Czech clerks and teachers in the Slovak part of the state.

History course books published before the foundation of the Czechoslovak Republic did not meet the requirements of the new statehood, especially regarding their content. Already in October 1918, a special committee for course books discussed the urgency of the situation. The committee consisted of František Drtina², Jaroslav Vlček³, Karel Kálal⁴, Stanislav Klíma⁵, Jozef Sedláček and Bohumil Vavroušek⁶. Their uneasy task was to come up with concrete suggestions as to how to provide course books for all types of schools

¹ In the Slovak territory, the school system was initially based on the former Austro-Hungarian legislation taken over by the Czechoslovak legal framework. This was formally established by Act n. 11/ 1918.

² František Drtina (1861-1925) was a philosopher, university professor and an assistant secretary at the Ministry of Education until 1921.

³ Jaroslav Vlček (1860-1930) was a literary historian, university professor and one of the major representatives at the Ministry of Education until 1923.

⁴ Karel Kálal (1860-1930) was a writer and an officer at the Ministry of Education.

⁵ Stanislav Klíma (1878-1944) was a writer, author of Slovak language course books and an officer at the Ministry of Education.

⁶ Bohumil Vavroušek (1875-1939) was a writer.

in the territory of the new republic⁷. Though former Czech course books were used provisionally in the Slovak territory⁸, it was expected that they would be shortly replaced by Slovak course books/course books in Slovak.

In 1919, Referát ministerstva školstva (School Office of the Ministry of Education) in Bratislava prepared and distributed to schools a list of course books, mostly written by Hungarian authors, which were recommended not to be used. On the other hand, the schools also received lists of recommended literature and guidelines for implementation of Slovak course books in the educational process.

Initially, according to a decree of the Ministry of Education and National Public Education, course books published outside Czechoslovakia were not allowed to be used⁹. While former course books might still be used to teach natural sciences and foreign languages, subjects such as history, geography and civics were placed in a different category, since one of their educational goals was to create a positive attitude towards the Czechoslovak Republic. Due to this, the Ministry of Education and National Public Education organized courses for teachers designed to re-qualify them in the school subjects most influenced by the change of the state system. These included history as well as geography, and Slovak and Czech languages¹⁰. Simultaneously, the Ministry in Prague encouraged Slovak teachers to participate actively in the preparation of Slovak course books, an initiative which met with a very positive reaction. Slovak teachers started to write new texts, but they also translated existing Czech books¹¹. The Ministry reminded the authors to limit the content as much as possible and to follow the requirements of a specific type of school. They

⁷ See O. Johnson, *Slovakia 1918-1938. Education and the making of nation*, New York, Eastern European Monographs, 1985, p. 91.

⁸ They were already in use in education practice in September 1919 as a result of the activity of the Minister of Education, Gustav Habrman (1864-1932), who initiated collecting of course books in Morava, Silesia and the Czech territory for the use in national and town schools in Slovakia.

⁹ On 16 December 1919, a meeting focusing on course books for Slovak folk and town schools was held at the School Office in Bratislava. The meeting was attended by school inspectors Jelínek, Mačenka, Rapoš, Bučenec, Černý, Štorch, Zikmundík, Ulrich, and administrators of folk schools Perra and Randýsek. They concluded that schools would prepare lists of course books which they would either use or need, together with written assessments of the quality of course books and suggestions for possible exclusion of problematic parts in the books. On 20 September 1919 Anton Štefánek sent an instruction to school inspectors and headmasters of secondary schools according to which geography and history should be taught exclusively according to the curricula approved for Czech schools, and not according to the previous Hungarian model. See State Archive in Nitra, *Topoľčany branch*, School Inspectorate in Topoľčany 1919-1949, box 1.

¹⁰ Participants of the courses were financially supported (accommodation, meals); they could also apply for financial assistance to cover other expenses. Courses were organized by the Ministry as well as by *Matica slovenská*. See A. Magdolenová, *Slovenské školstvo v prvých poprevratových rokoch* [Slovak Educational System after 1918], «Historický časopis», n. 4, 1981, p. 488.

¹¹ Regardless of their efforts, due to the lack of books the content of teaching had to be dictated during the first years.

were also to consider the age of learners and avoid too detailed texts. The authors were advised to bear in mind the goals specified for the subject in the educational plans and curricula. A course book which was thick was too heavy for children to carry and was obviously more expensive to print. The guidelines specified that a course book which did not follow the recommendations of the Ministry would have to be rewritten¹². From the overall perspective, the increase in the number of course books was evident in the second half of the 1920s, when 52 books for Slovak schools were published¹³.

According to a directive of the Ministry of Education from October 1920¹⁴ distributed to school inspectorates and schools, all course books which did not meet the official requirements of the new state system were to be eliminated from the school year 1920-21. From 1921-22 all course books published abroad were to be excluded from use, though the Ministry had the right to allow exceptions and reconsider special cases. The decree further stated that course books for secondary schools were not satisfactory as regards the new state system and therefore should be changed. The decree established re-authorization of course books which should be written following the ideology of the Czechoslovak Republic. It explicitly cautioned that the course books used in schools at the time of the edition of the decree contained passages loyal to the former state and were not adjusted to the “spirit” of the new republic and altered political-geographical situation. As a result, the publishers were asked to remove all references to the monarchy from course books and present new editions for approval as soon as possible.

Regulations of the decree of December 1919 were amended by the decree of the Ministry of Education of 15 October 1923 n. 121.648-II which observed that despite previous regulations, course books written by foreign authors and published abroad were still being submitted for approval by the Ministry. It warned that such publications would not be approved¹⁵. From the end of the school year 1920-21 a list of approved course books with their prices (valid for the school year 1921-22) was published as an attachment to the

¹² *Výnos ministerstva školstva z 10. januára 1923 č. 123.151* [Decree of the Ministry of Education of 10 January 1923, n. 123.151]; *Věstník ministerstva školství a národní osvěty 1923* [Newsletter of the Ministry of Education and National Public Education of 1923]. *Věstník ministerstva školství a národní osvěty* [Newsletter of the Ministry of Education and National Public Education] as a bulletin of the Ministry was published in its modified form from 1 January 1921. It was published monthly and its subscription was compulsory for all school offices and schools. Issues of the newsletter were archived. See State Archive in Nitra, Topolčany branch, School Inspectorate in Topolčany 1919-1949, box 1.

¹³ 21 books were for folk schools, 12 for town schools and 19 for secondary schools. 22 course books were published by the state-owned publishing houses, 30 were published independently.

¹⁴ The directive was based on the decree of the Ministry of 18 December 1919, n. 55.900. See *Věstník ministerstva školství a národní osvěty 1920* [«Newsletter of the Ministry of Education and National Public Education of 1920»].

¹⁵ State Archive in Nitra, Topolčany branch, School Inspectorate in Topolčany 1919-1949, box 1.

Věstník ministerstva školství a národní osvěty («Newsletter of the Ministry of Education and National Public Education»)¹⁶. In this way, course books which were not approved or mentioned in the list by the Ministry were to be gradually eliminated from use¹⁷.

2. Course books in Slovak

The lack of Slovak course books was discussed in parliament when Gustáv Habrman, the Minister of Education tried to explain the complexity of the situation¹⁸. After a parliament interpellation by an MP, Dr Karol Kmet'ko, on 15 June 1920, the Minister suggested that to accelerate the distribution of Slovak course books, an affiliated branch of the state publisher should be established in Bratislava and a special sum was reserved in the state budget for the publication of Slovak course books.

Spolok profesorov Slovákov (The Society of Professors of Slovakia)¹⁹ also became actively involved in the process of the introduction and distribution

¹⁶ See the decree of the Ministry of 8 October 1920, n. 63.238.

¹⁷ The information was mentioned in the section called «schválené učebnice a učebné pomôcky» [“approved course books and teaching aids”] of the newsletter. The text was divided according to the type of school. See Archive in Nitra, the Topolčany branch, School Inspectorate in Topolčany 1919-1949, box 1.

¹⁸ The Minister argued that a lack of paper was one of the reasons for the unacceptable situation in course book publication and distribution.

¹⁹ The society was founded in 1921. Its regulations were authorized by the decree of Ministerstvo s plnou mocou pre správu Slovenska [Ministry with the Supreme Authority for the Administration of Slovakia] n. 24.961/21 of 2 December 1921. Membership was allowed only to applicants from the teaching profession and of Slovak nationality. The aim of the society was to «defend the general, national, material, moral and class interests of Slovak professors». It promoted Slovak nationalism at Slovak secondary schools, specialized schools and pedagogical institutes. The society had 86 members in December 1921; in 1932 the membership increased to 300. The chairman in 1921 was Karol Murgaš, the headmaster of the grammar school in Košice; his deputies were Miloš Ruppeldt, the headmaster of the music school in Bratislava, and Ján Koválik, a professor of the grammar school in Trstená. The society met four times a year. See Slovak National Archive, The Society of Professors of Slovakia 1921-1941, box 1 and 2. On the regulations see *Sborník spolku profesorov Slovákov* [Proceedings of the Society of Professors of Slovakia] 1934-35 pp. 81-84. The society addressed several resolutions to the Ministry of Education (e.g. in 1922). They required a change in the name of the Slovak schools from ‘Czechoslovak’ to ‘Slovak’. In October 1924, the society sent a memorandum to the president T. G. Masaryk which asked that the language in pupils’ reports at the end of the school year should be either Slovak or Czech, not Czechoslovak. See Slovak National Archive, Society of Professors of Slovakia 1921-1941, box 1. To disseminate their thoughts, the society founded a journal «Sborník spolku profesorov Slovákov» [Proceedings of the Society of Professors of Slovakia] issued five times per year. The journal was a communication platform for educators to discuss – among other things – the situation regarding course books. The language quality of course books was specified as a major problem. See «Sborník spolku profesorov Slovákov» [Proceedings of the Society of

of course books in Slovak. According to the 1925 report of the society, the process of preparation of Slovak course books for secondary schools was extremely slow. Many Slovak professors responded to the 1921 call of Školský referát Ministerstva školstva a národnej osvety (School Office of the Ministry of Education and National Public Education) to write or ‘Slovakize’ course books, yet the results were unsatisfactory and the society criticized the passivity of the process and repeatedly warned of a critical situation at Slovak secondary schools, pedagogical institutes and business academies. The lack of Slovak course books was strongly felt in the subject of history, especially in higher grades, where the books were necessary. The society appealed for Slovak course books to be edited and their language proofread by Slovaks²⁰. At the meeting held on 9 January 1927, the society unanimously agreed that they would try to publish Slovak course books and handbooks²¹. However, in the memorial book of 1932 the society admitted that only limited success had been achieved²².

The situation concerning the course books and their distribution was criticized also by Zemský učiteľský spolok (Regional Teachers’ Society) in the society’s journal Slovenský učiteľ (Slovak Teacher). They objected that the available sample of Slovak course books was poorer than before 1907. The society further criticized the fact that the manuscripts of course books had been waiting for months at the ministry and many of them might have been approved within a week²³.

Professors of Slovakia], 1930-31 pp. 99-103.

²⁰ The following history course books for secondary schools had been approved by the Ministry of Education and National Edification by 30 April 1925: K. Hlavinka, *Stručné dejiny národa československého pre nižšie triedy slovenských stredných škôl* [A Short History of the Czechoslovak Nation for Lower Grades of Slovak Secondary Schools] (published by private press); J. Pešek, *Z doma a cudziny. Diel II. (starovek a stredovek) III. (stredovek a novovek)* [From Home and from Abroad. Part II (ancient and medieval history). Part III (medieval and modern history)] (published by private press); J. Vlach, A. Krecar, M. Bzdúšek, J. Svatik, *Dejepis obecný pre nižšie triedy stredných škôl. I diel (starovek)* [General History for Lower Grades of Secondary Schools. Part I (ancient history)]. See «Sborník spolku profesorov Slovákov» [Proceedings of the Society of Professors of Slovakia], vol. 1925, pp. 28-30.

²¹ Slovak National Archive, «Spolok profesorov Slovákov» [Society of Professors of Slovakia], vol. 1921-1941, box 2.

²² The failure and responsibility were rather unfairly ascribed to the reviewers. See M. Hornák, *Zpráva o desaťročnej činnosti SPS* [A Report of the Ten-year Activity of the Society of Professors of Slovakia], in P. Florek (ed.), *Pamätnica Spolku profesorov Slovákov 1921-1931* [Memorial Book of the Society of Professors of Slovakia], Turčiansky Sv. Martin, Spolek profesorov Slovákov, 1932, p. 54.

²³ «Slovenský učiteľ» [Slovak Teacher], vol. 1924, n. 1, pp. 8-11. See also: E. Novák, *Spisovná slovenčina a školstvo v ČSR* [Standard Slovak Language and Educational System in the Czechoslovak Republic], in A. Žitavský, *Pamätník slovenského školstva* [Memorial Book of Slovak Educational System], Bratislava, Vydavateľstvo pamätníka slovenského školstva, 1936, pp. 71-75.

2.1. *The decree of 1928*

Regulations for the preparation of course books were specified by the decree of the Ministry of Education and National Education of 3 July 1928 n. 41.260-II, issued as an instruction for the content and formal requirements of course books. The decree submitted for approval from the school year 1928-29 was valid for the course books of national schools, folk schools (*obecné školy*), business schools and specialized schools. Previous findings of the inquiry initiated by the Ministry had clearly indicated the need to modify not only the course books but also the guidelines for their preparation which would then serve as an aid for authors, publishers and reviewers.

The decree specifically discussed four major aspects of course books: scientific, educational, didactic and formal.

Scientific aspect

A course book should present current scientific knowledge, without erroneous and fallacious information and should be primarily based on the essential facts of general knowledge. Details which a professional might be interested in were to be omitted. It was also emphasized that the content of the course book of individual subjects should be composed 'in harmony', i.e. in a cross-curricular and cross-referential way so that learners acquire consistent and integrated education.

Educational aspect

This aspect focused on the questions of state, politics and ideology. This concerned primarily the course books of history, geography and civic education. Course books should instil patriotic sentiments in a fully objective, matter-of-fact and well-articulated way so that they would not arouse animosity and hostility against other states or nations, yet they would promote emotional attachment of learners to their homeland and nation.

Didactic aspect

The extent of the presented material should correspond accurately to the prescribed curricula. Special attention was given to terminology; new terms should be introduced consistently and foreign terms should be reduced in order not to overload learners' memories. The course book should address the mental ability of learners. Tasks, exercises and questions should develop independent learning and support self-study.

Formal aspect

This aspect prescribed the technical requirements of a course book from its title page to the exact specification of the grade for which the course book was designed. The scope of the course book should reflect the number of lessons recommended for the subject. The decree specified the rules which should be observed in the case of course books in Czech and German. Course books

in Czech, for instance, should be written in accordance with the most recent edition of *Pravidlá českého pravopisu* (Grammar Rules of the Czech Language). Interestingly, no specialized consultation of grammar rules was suggested for the course books written in the Slovak 'version' of the Czechoslovak language, neither for books in Polish, Ruthenian and Hungarian. In the case of course books written in the Slovak 'version' of the Czechoslovak language the question of language transferred to the area of terminology. According to the recommendation, special terms should be as close to Czech equivalents as possible; the only exception being if a Slovak term was already in use and firmly established, or a term taken from the Czech language contradicted the standard rules of Slovak.

Other formal requirements were the following:

- each course book should have a complete alphabetical index;
- illustrations should be closely related to the text;
- typefaces and fonts should be easily legible;
- paper should not be too glossy;
- specific book size 15 x 21 cm was recommended²⁴.

2.2. *The decree of 1932*

In April 1932, representatives of the Society of Professors of Slovakia visited the minister of education Ivan Dérer concerning the question of publication and approval of course books. They noted that according to the former procedure, the Ministry of Education and National Edification sent the manuscript to two professors whose reviews were published. According to the new procedure, there was only one reviewer whose review was not published and thus was not available for criticism. The society demanded that the former practice should be adopted again. The minister responded that there were actually still two reviewers, but due to economic reasons, however, the reviews were not published in the Office newsletter²⁵ and were sent only to the author(s) of the manuscript²⁶.

On 6 December 1932 the Ministry of Education and National Edification following the former legislature-issued decree 136.546-I on the introduction, use and approval of course books and teaching aids. It specified that the approval of a course book was valid only for one edition; further editions – even if there were no changes – had to be submitted for re-approval by the Ministry. To prevent frequent changes of course books, the Ministry allowed a

²⁴ An exception was for atlases, which had a bigger size.

²⁵ «Úřední list republiky Československé» [Office Newsletter of the Czechoslovak Republic] was published monthly from 1920 to 1961.

²⁶ Slovak National Archive, «Spolok profesorov Slovákov» [Society of Professors of Slovakia], vol. 1921-1941, box 4.

new edition of the already approved course book only after five years from its latest edition (if the course books had been already in use for five years) or if there were other important reasons (for example, concerning the subject of the course book or methodology, a significant discovery, a change in the law, etc.). When the course book was submitted for re-approval, the applicant had to state specific reason(s). New course books could be put in use until the end of May of the school year on the basis of the approval of school inspectors for Slovakia. Before that, however, the inspector considered suggestions/recommendations of teachers' meetings. The decree explicitly warned that the choice of course books (or teaching aids) for school had to be based on objectivity and pragmatic reasons. Personal relations, preferences and benefits were to be avoided²⁷.

Manuscripts of new course books were submitted to the Ministry of Education in three printed copies²⁸. If the submitted version met all the formal requirements, it was sent for review to specialists²⁹. The review assessed the content, form, pedagogical-didactic qualities, language as well as the state-educational aspect of the publication. Subsequently, a specialist submitted the review with the recommendation to approve or reject the manuscript. The reviews of Slovak course books were submitted to the School Office in Bratislava which prepared and attached an additional statement concerning the book and sent it to the Ministry in Prague. The Ministry of Education made a final decision on the approval or rejection of the reviewed book. In case the approval process were successful, the type of school and the language of teaching was determined as well as the time period during which the book might be in use. The approval was published in the newsletter of the Ministry. Each recommended course book contained a special statement as the evidence of the Ministry's approval³⁰.

²⁷ Proposals for new course books were submitted to the inspector at the latest from 1 April of the concerned year. The school administration was obliged to prepare a list of suggested course books for the following school year to the school inspector 90 days before the end of the school year at the latest. The list was publicly available so that learners' parents could see it in advance. After the school year started, the list could not be altered and new course books could not be introduced.

²⁸ Handwritten manuscripts were not accepted.

²⁹ The course book reviewers were specialists in the selected scholarly field, with no personal or professional connections (e.g. as employees) to the author of the course book. The reviewer could not be an author of a course book of a related type and language as the reviewed title. In terms of the state-civic aspect, the reviewer had to be of good moral character and reliable. The School Office in Bratislava modified and updated the list of reviewers of course books for national schools annually. The list was submitted to the Ministry of Education in Prague by the end of January (at the latest) of each year. It was subsequently published in the newsletter of the ministry. E. Kázmerová, *Spolok profesorov Slovákov v rokoch 1921-1941* [Society of Professors of Slovakia from 1921 to 1941], «Historický časopis», n. 3, 2008, p. 468; Slovak National Archive, *The Society of Professors of Slovakia 1921-1941*, box 4.

³⁰ Schváleno výnosom MŠaNO ze dne... č.... jako učebnice (pro obecné, ľudové, meštianske, pomocné, národné, materské školy) s vyučovacím jazykom... [Approved by the decree of the Ministry of Education and National Edification, date..., n.... as a course book for folk schools,

Despite all the effort, even in 1933 the Ministry of Education learnt that non-approved course books or course books approved by the Ministry though not yet announced in the newsletter were in use. The problem was mentioned in a circular letter³¹ of 27 October 1933 issued by the Ministry³². It particularly stated that the use of such course books must not be allowed (whether in manuscript or printed form), even though the use might have been explained by the need to test the book at school. However, exceptions by the Ministry were allowed³³. The situation did not improve significantly and on 26 May 1936 the Ministry of Education issued regulation n. 45.386-II about the purchase of teaching aids of domestic (Czechoslovak) production. The schools should purchase only such aids which were approved by the Ministry in Prague or the Schools Office in Bratislava. The regulation repeated that teachers and professors should not use foreign aids³⁴ if domestic aids of appropriate quality and price were available. They were expected to inform the learners why it was necessary to prefer domestic materials over foreign ones.

3. *History course books and promotion of Czechoslovak identity*

Regarding language, schools in the Slovak territory initially used three kinds of course books: course books in Czech, course books which were ‘re-Slovakized’ (translated into Slovak mostly from Czech) and course books in Slovak written by a Slovak author³⁵.

As far as the content was concerned, national and world history were taught separately³⁶, and course books emphasized the formation of Czechoslovak awareness and collective identity. The basic attitude was that Czechs and Slovaks represent two ‘branches’ of one nation, related via ethnic affinity,

town schools, schools for handicapped children, national and kindergartens) with as a language of teaching].

³¹ A circular letter was issued monthly. It was not an official publication.

³² Regulations of the decree and their observance were discussed in a circular letter of 5 April 1935. The School Office in Bratislava repeatedly issued reminders that the launching of new course books should be in accordance with the regulations of the decree of the Ministry of Education of 6 December 1932, n. 136.936/I.

³³ State Archive in Nitra, Topoľčany branch, School Inspectorate in Topoľčany 1919-1949, box 15.

³⁴ In case foreign materials or teaching aids were needed, the approval of the Ministry was required.

³⁵ The only original Slovak course book for secondary schools was the Karol Hlavinka’s *Stručné dejiny národa československého pre nižšie triedy slovenských stredných škôl*, cit. (1926).

³⁶ See 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. 37.

language affinity and cultural heritage³⁷. Course books depicted Czechs and Slovaks as ‘fighting’ together and supporting each other against the mutual enemy represented by Germans and Hungarians. The Austro-Hungarian Empire was compared to the prison of both nations³⁸ and Hungarians had always been major oppressors of Slovaks³⁹.

History course books focused mainly on Czech history, to which were added (usually at the end of a chapter or subchapter) selected parts about the Slovak past. As a case study, a ‘Slovak’ history course book for secondary schools written by Czech historian Josef Pekař is presented here. Two editions with the same title *Dějiny/Dejiny československé*⁴⁰ were published in 1921 and 1938 respectively⁴¹. The first edition was published in Czech, the second was ‘re-Slovakized’.

The 1921 edition of 198 pages was divided into eight chapters: 1. The Czech lands in the Migration period; 2. The Czech lands at the beginning of the Slavic age; 3. The Czech lands from 900 to 1200; 4. Czechoslovak history in the Gothic age; 5. Czechoslovak lands during the Renaissance and Counter-Reformation; 6. Enlightenment and revolution; 7. The era of Franz Joseph; 8. The foundation of the Czechoslovak state⁴². Regarding Slovak history, the course book mentions it only marginally, paying attention only to the arrival of

³⁷ A circular letter of the School Office in Bratislava from 8 January 1934 which addressed the question of the teaching materials stated that all illustrations related to history and geography which did not represent historical events according to the Czechoslovak ideology of nation and state should be removed from national schools (State Archive in Nitra, Topolčany branch, School Inspectorate in Topolčany 1919-1949, box 17).

³⁸ According to Czechoslovak ideology, historical circumstances before 1918 separated Czechs and Slovaks. The foundation of the Republic united them again.

³⁹ Decree of the Ministry of Education and National Edification 57.170 of 21 November 1919 focused specifically on the use of the terms «Uhor» and «uhorský». It is important to note that in Slovak there is a distinction between the noun and adjective describing the Hungarian nation and nationality before («Uhor» and «uhorský») and after («Maďar» and «maďarský») 1918. There is no such distinction in the English and Hungarian languages. The aforementioned decree stated that due to the changed political conditions, there was no reason to use the pre-1918 term «Uhor» in a political sense any more. The decree therefore ordered that in all educational documentation, official documents, in course books and in the educational process, the term «Maďar» and «maďarský» should be used instead.

⁴⁰ *Dějiny* [History – in Czech] / *Dejiny* [History – in Slovak] *československé*.

⁴¹ J. Pekař, *Dějiny československé pro nejvyšší třídy škol středních* [Czechoslovak History for Highest Grades of Secondary Schools], Praha, Nákladem historického klubu, 1921. Approved by the Ministry of Education by the decree of 2 August 1921, n. 68.887. J. Pekař, *Dějiny československé pro nejvyšší třídy škol středních* [Czechoslovak History for Highest Grades of Secondary Schools], Praha, Historický klub, 1938. Approved by the Ministry of Education by the decree of 25 July 1938 n.106.993/38-II/1. The course book was ‘re-Slovakized’ by Cyril Chorvát and edited by Josef Klik.

⁴² «1. Země české v době stěhování národů; 2. Země české na počátku doby slovanské; 3. Říše česká v době od r. 900 do 1200; 4. Dějiny československé v době gotické; 5. Země československá v době renesance a protireformace; 6. Doba osvětenství a revoluce; 7. Doba císaře Františka Jozefa; 8. Vznik československého státu».

the Slavs on the Slovak territory, Samo's tribal union and Svatopluk's kingdom⁴³. A separate sub-chapter focused on the 'Hungarian invasion'⁴⁴ and the conquest of the Carpathian Basin at the turn of the 9th and 10th centuries. Hungarians are described as a «wild nomadic nation», whose invasion caused that «Slovakia lost its national unity for more than ten centuries» and the settlement of Hungarians is described as «a great tragedy for the future of the Slavs»⁴⁵. Hungarians are mentioned as the reason for the fall of Great Moravia which was presented as the first common state formation of Czechs and Slovaks. Another common historical point was the activity of the Hussites, especially the deeds of Ján Žižka (c. 1360-1424) and the invasions of the Hussites of the Slovak territory⁴⁶. Another mutual point was the period of the Reformation. Pekař on one hand presents the conflicts of the time, and on the other hand he describes how the Reformation brought Czechs and Slovaks together, especially in the form of the spread of the Czech language into the Slovak territory through religious activity⁴⁷. Germans are presented in the course book as colonizers although without further negative connotations⁴⁸. Regarding the period of the National Revival in the 19th century, Pekař writes that «Prešpurk (Bratislava) became the centre of the patriotic Czechoslovak reform movement»⁴⁹. Hungarians are repeatedly described as initiators of all problems. For instance, in chapter seven, in relation to the educational policy against non-Hungarian nations in Hungary (Uhorsko) the author claims that «Slovak dioceses were forced to accept Hungarian bishops whose task was to suppress national spirit and to spread magyarization from the pulpit and the altar»⁵⁰. In the last chapter of the course book, the foundation of the republic in 1918 is described as an inevitable consequence and culmination of a mutual effort by Czechs and Slovaks. The course book pays specific attention to T.G. Masaryk as an influential statesman for the common state. The course book maps the history until 1921.

The 1938 edition published in Slovak consisted of nine chapters: 1. Earliest settlement of our lands; 2. Czechoslovak lands at the beginning of the Slavic age; 3. Czechoslovak history from 900 to 1200; 4. Czechoslovak history in the Gothic age; 5. Czechoslovak lands during the Renaissance and the Counter-Reformation; 6. Enlightenment and revolution; 7. The era of institutional life; 8. The foundation and history of the Czechoslovak Republic; 9. Development

⁴³ Pekař, *Dějiny československé pro nejvyšší třídy škol středních* [Czechoslovak History for Highest Grades of Secondary Schools], 1921, cit., p. 5, 7, 11.

⁴⁴ «maďarský vpád».

⁴⁵ *Ibid.*, pp. 13-14.

⁴⁶ *Ibid.*, p. 53.

⁴⁷ *Ibid.*, pp. 82, 85, 90, 96.

⁴⁸ E. Bakke, *Čechoslovakizmus v školských učebniciach (1918-38)* [The Concept of Czechoslovakism in Course Books], «Historický časopis», n. 2, 1999, p. 249.

⁴⁹ Pekař, *Dějiny československé pro nejvyšší třídy škol středních* [Czechoslovak History for Highest Grades of Secondary Schools], cit., p. 125.

⁵⁰ *Ibid.*, p. 136.

of domestic and foreign historiography⁵¹. The titles of the chapters indicate the shift and emphasis given to the idea of a common Czechoslovak history and Czechoslovak nation. In comparison with the 1921 edition, there were distinct changes in the tone of the discourse and inner arrangement of chapters. Again, the course book presents the fall of Great Moravia as a catastrophe for Czechoslovak unity and sees the Hungarian invasion as its major reason⁵². The course book promoted a mutual cultural heritage, for «the Czech cultural influence was noticeable also in the period of Hungarian rule and contributed to the establishment of the Hungarian Kingdom»⁵³. A special section at the end of each chapter in the course book was dedicated to culture and art and mentioned people of significance for Slovak cultural history, such as Ján Kollár (1793-1852), Pavel Jozef Šafárik (1795-1861) and Anton Bernolák (1762-1813)⁵⁴. The course book emphasized national unity and the fact that «mutual penetration of both national branches contributed to the maintaining of national unity»⁵⁵. The question of language was mentioned as well and the course book suggested that «a separate standard language should be the most powerful weapon of Slovaks against magyarization»⁵⁶. Magyarization in the form of educational policy in Hungary was documented also by reactions from abroad⁵⁷. The penultimate chapter presented the efforts to create the common state of Slovaks and Czechs, and the Martin Declaration of 30 October 1918 is mentioned. A separate chapter focuses on T.G. Masaryk⁵⁸. We may conclude that the 1938 edition pays more attention to the Slovak past, though the ideology of a mutual Czechoslovak identity is clearly maintained.

Conclusion

The subject of history in general and history course books in particular had a special significance in the development and promotion of the ideology of Czechoslovak identity. From the very beginning, statesmen and educators

⁵¹ «!Najstaršie osídlenie našich zemí; 2. Československé zeme na počiatku slovanskej doby; 3. Československé dejiny v dobe od r. 900 do r. 1200; 4. Československé dejiny v dobe gotickej; 5. Československé zeme v dobe renesancie a protireformácie; 6. Doba osvietenstva a revolúcie; 7. Doba ústavného života; 8. Vznik a dejiny Československej republiky a 9. Vývoj dejepisectva cudzieho i domáceho».

⁵² Pekař, *Dějiny československé pro nejvyšší třídy škol středních* [Czechoslovak History for Highest Grades of Secondary Schools], 1938, cit., p. 14.

⁵³ *Ibid.*, p. 18.

⁵⁴ *Ibid.*, p. 116.

⁵⁵ *Ibid.*, pp. 79, 94, 95.

⁵⁶ *Ibid.*, p. 117.

⁵⁷ *Ibid.*, pp. 133-134.

⁵⁸ *Ibid.*, p. 145, 156, 160.

realized that history course books played a major role in the formation of the ideological background of the newly founded Republic. As the paper shows, the legislature strongly supported the use of domestic teaching aids and materials and the promotion of attachment to the Republic was a natural part of the strengthening of patriotism. In retrospect, we may conclude that the course books used during the Czechoslovak Republic were notably different from modern and current books. In terms of content, Slovak history had a marginal place within the Czechoslovak discourse presented in the course books. An important reason for this was that course books were originally written in Czech and mapped Czech history; the Czech original was partially modified only later to deal with the lack of course books in the Slovak area. It is evident that the themes of the mutual past of the Slovaks and Czechs were promoted in order to support the legitimacy of the existence of the new state. This was done mainly through the discourse of 'the common fight for freedom' in the face of oppression.

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State Archive in Nitra, *Topolčany branch*, School Inspectorate in Topolčany 1919-1949, box 1

National, state and civic education in the Czech lands of the Austro-Hungarian Empire, and, after 1918, in Czechoslovakia*

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ABSTRACT: The study analyses the themes and issues of national, *völkisch*¹ and civic education in the last third of the nineteenth century in the Czech lands of the Austro-Hungarian Empire through close study of Czech and German pedagogical discussion. In addition, the study focuses on structural changes and key concepts of national and civic education after the advent of the Czechoslovakian state. In the second section, the paper analyses and questions the basis and scope of historical subjects in History text books, texts used in civic education and reading primers in elementary and lower-secondary schools teaching in the Czech and German languages in the Czech lands.

EET-TEE KEYWORDS: Citizenship Education; Nationalization; Civics; Cultural Identity; Austria- Hungary, Czechoslovakia; Century XIX.

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¹ The term *völkisch* has no direct English translation. It should be regarded as a conflation of folklore, ethnicity and race and was a crucial driving force in the period under review. The 'völkisch ideology' integrated ideas of: militarism, racism, anti-Semitism, anti-Slavic participation, high-Germanism, panGermanism and Darwinism. It rejected Liberalism and internationalism. This paper uses the original term throughout.

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Introduction

The origins of concepts of national and civic education in Central Europe differ markedly as they are based not only on professional, pedagogical discourse, but much more via general social and political debate which took place at the end of the nineteenth century and beginning of the twentieth century. The different meanings of the terms 'national' and 'civic' education were dependent on whether they were developed from Czech or German pedagogical discussion, as this would mean they were the result of work and actions by Czech or German teachers living and working in the Czech lands and speaking their respective languages. This link to language (especially at the end of the nineteenth century) also meant a broader connection to culture and society complete with all their subtexts, meanings and codes. These cultural frameworks were the complex and problematic result of two major forces and movements for national recognition and autonomy, the goals and dynamics of both the Czech and German movements were mutually determined, reactive to one another and ultimately dependent upon one another.

In the first instance, a key element was the emergence of Czech nationalism in the first half of the nineteenth century and the rapidly developing professional activities of scientists, cultural and literary figures in society which led to the public enlightenment efforts of the top leaders in Czech cultural, political and civic life during the latter part of the nineteenth century.

The second factor was the growth of the German national movement which was, for the most part, a reaction to demands for Czech national emancipation and the result of nationalistic liberal tendencies on the part of the German population in the Czech and Austrian lands in the Habsburg Empire².

After the defeat of the Austro-Hungarians and Germany at the end of the First World War and the founding of the subsequent states – in our case the Czechoslovakian Republic in 1918 – there was a radical revision of the map of Europe. This was mostly negotiated between multi-ethnic states or those 'burdened with the problems' of the co-existence of national minorities. As a result, Europe found itself with a new series of national problems and expectations in the post-war period.

Several new democracies and republics were founded in Europe in 1918, but culturally, socially and politically, most of the citizens of the new countries were

² After defeat for Prussia and the dissolution of the German lands, the Austrian Germans lost their previous cultural and linguistic power-base and they became an ethnic minority in the Czech lands of the former Austro-Hungarian Empire. Even though they were still leading and monitoring the old way of the Empire, they felt increasingly insecure and endangered by the strengthening demands of the non-German nations in the Empire – mostly Czechs – in public, societal and political levels. After the defeat of Prussia in 1866 it was clear that Emperor Franz Josef I had to decide if he would continue with centralised rule or if he would allow the model of federation and dualism to be pursued. In 1867 the Austro-Hungarian Empire was founded.

still anchored in the state-of-mind and prevailing models of the old Empire. The situation was difficult in the newly constituted Czechoslovakia which carried from its inception the 'burden' of attempting to integrate national minorities which refused to accept the new order and, at the same time, to meet the needs of others with a strong attachment to the new political structure in the middle of Europe. Although by 1938 Czechoslovakia was one of the last true democracies in Europe, its origins were far from easy. Czechoslovakia was geographically neighboured by Germany, Austria, Poland and Romania³. The state was composed of the Czech lands, Moravia-Silesia, Slovakia and sub-Carpathian-Ruthenia. The borders of the state were defined by the graduated peace treaties. The territorial compact was agreed by international guarantees from 1920 but it was only completed in 1924⁴. The situation was also difficult from the point of view of the national element of the population or from the different national groups within the newly-founded Republic. The new nation was established on what was supposed to be 'natural' evidence of a Czechoslovakian state, but in reality in Czechoslovakia there lived (according to the first census of 1921) a population totalling 13,374,364. In this figure there were less Slovaks (1,941,942) than Germans (3,123,568 – which was 23% of the population – in the Czech lands alone there lived 2,983,000 Germans). In Slovakia there was a large Hungarian minority (745,431 or 5.5% of the population). Other minorities were Rusyns (461,849 or 3.45% of the population). The Polish minority was also significant (75,873 or 0.56% of the population).

The new Czechoslovakia not only allowed the Jewish faith, but also acknowledged those Jews as a part of the larger Jewish nation (they represented 1.3% of the population). Although Jews formed a low percentage of the total Czechoslovakian population, their cultural and social influence on Czech society was much stronger. The important part Jews played in Science or professional discussion was especially significant. They were engaged in the spheres of Law, Literature, Medicine, Science and the Natural Sciences, though less so in Social Sciences and pedagogical debate. If Jewish intellectuals were dealing with questions of education then there arose the issue of assimilation, but with this factor came a form of disorientation from the reality that the Jewish population was also engaged in the continuing search for its own identity under the growing cultural and political influence of Zionism.

«Slovakian pedagogical development in public schools was strongly subdued by Hungarian pressure at the beginning of the twentieth century when [...].

³ The Czechoslovakian Republic shared the borders with Germany for a total of 1,545 kilometres, with Poland for 984 km, with Romania for 201 km, Hungary for 832 km and Austria for 558 km. The full length of the borders was 4 120 km.

⁴ From the point of view of foreign political analysts, the allies of Czechoslovakia during the whole inter-war period were France and Great Britain. Although foreign politicians expressed concerns with regard to the international developments in Europe and the emerging political situation in neighbouring Germany.

Hungarian became the official language in all schools»⁵. Czech pedagogues defended the results of the revolution – their own state and the concept of state-civic education. This was certainly linked to the concept of Czech national education in the nineteenth century and only in a very limited way was it sensitive to the needs of the German speaking areas of Czechoslovakia, which saw the new state as an element endangering the national aspirations of Germans in Czechoslovakia. This situation pertained in the inter-war period, an arena of various national endeavours which was very often at odds with the state-civic concept, where without accepting their linguistic and cultural identities, each citizen was tied to the state by the unilateral decision to call itself Czechoslovakia and to protect its national goals and principles, from the perspective of the ethnic or cultural heterogeneity.

The following study analyses the thematic concepts of national, state-civic and völkisch education, their roles and meaning at the cusp of the nineteenth and twentieth centuries, their influence and goals in the pedagogic discourse of this period. Attention is also given to contemporary sources which were; teachers and their views, pedagogical magazines and groups known as national protection organisations. In another section the study focuses on changes to national rhetoric, the national discourse after 1918, the newly constituted concept of state-civic education and the Republic's education policy. The experience of both nationalities are examined, the problems of co-existence between Czechs and Germans, as well as Czech, German and Jews after the founding of Czechoslovakia.

Additionally there is an analysis of the role of national, civic and völkisch education in the taught content of History lessons. After 1918 civic education began in the First Republic and its development and content is examined for the period 1918-1938.

National education – did it support or form the nation?

The question of national emancipation was characteristic of the pedagogical discussion at the end of the nineteenth century and we can see it as an important aspect in the formation of civic society in the Czech and Austrian lands of the Austro-Hungarian Empire. This began after the deep political crisis of 1867 when it became clear that the monarchy had to be reformed legalistically as well as politically and economically. These imposed solutions meant that, from the very outset, Czech teachers felt disillusionment and a lack of reassurance that Vienna did not have a genuine interest in the equality of nations in

⁵ B. Kudláčová, *Školstvo a vzdelavanie*, in B. Kudláčová, A. Rajský (edd.), *Europske pedagogické myslenie*, Trnava, Veda, 2012, p. 182.

Cisleithania (the common unofficial name given to the northern and western part of Austria-Hungary) or that the changes only advantaged Czech Germans⁶: «Constitutional law or the national, Vienna's centralised development was changing the Empire into two distinct linguistic areas – Hungarian in Hungary and German in Austria – the monarchy became a German- Hungarian compact to make the leading nations the dominant ethnic groups»⁷.

Czech teachers were bitterly critical of the educational policy from Vienna's ministries and law regulators, specifically Hasner's rule⁸ which «was a modern law – in the field of primary school education and teacher training»⁹. This was taken negatively by the teaching community working in the Czech language and they blamed Hasner for providing the tool that would lead to the Germanisation of Czech schools.

The Czech and German teaching groups communicated with one another in a sporadic manner even though the levels of professionalism in both camps were equal¹⁰. Both groups worked on; making their curricular material more scientific, developing the county schools (lower-secondary – in Czech, měšťanská škola, and known in German as Bürgerschule), supporting science and improving training for teachers in four-year long high school institutions, campaigning for independence for teachers away from the influence of the church and more engagement with civic laws¹¹.

The political representatives of Czech teachers found very little to be positive about «the first product of the political dominance of the liberals was the so-

⁶ Their response in this situation was from the very beginning to sabotage Vienna's political control, whereby the Czech members refused to attend the central Parliament and only actively engaged in political discussion at the provincial council in Prague. More H.C. Agnew, *Češi a země Koruny české*, Praha, Academia, 2008, p. 176.

⁷ J. Křen, *Dvě století střední Evropy*, Praha, Argo, 2005, p. 201.

⁸ A school law from 1869 known as Hasner's Law extended compulsory schooling in the lands of Cisleithania for eight years and in elementary schools (*obecná škola* or in German as *Volksschule*) or eight years in county schools – lower secondary schools (*měšťanská škola* or in German as *Bürgerschule*), or in the model of five years in the elementary schools and followed by three (later four) years in the county schools which was at the level of lower-secondary education. The publication of Hasner's Law had two important predecessors, legislative actions which liberalised society in the Czech lands of the Empire – the December constitution of 1867 and the law changing the position of schools with regard to the church from 25th May, 1868. The author of this law was a minister and professor of political science at Prague University called Leopold Hasner (1818-1891).

⁹ E. Protner, *The Development of private education regulation in the field of teacher training in Slovenia*, «History of Education and Childrens Literature», vol. 8, n. 1, 2013, p. 32.

¹⁰ T. Kasper, D. Kasperová, *České učitelstvo a Hasnerovy zákony 1869*, «E-Pedagogium», n. 3, 2010, pp. 26-37.

¹¹ T. Kasper, D. Kasperová, *České učitelstvo na cestě k reformě školy*, «E-Pedagogium», n. 3, 2012, pp. 22-34 and T. Kasper, *České učitelstvo mezi sjezdy československého učitelstva 1870-1880 v diskusi Posla z Budče*, in T. Kasper, N. Pelcová, S. Sztobryn (edd.), *Úloha osobností a institucí v rozvoji vzdělanosti v evropském kontextu*, Praha, Karolinum, 2013, pp. 37-45.

called December Constitution»¹² of 1867 which was a complete set of civic rights and freedoms which guaranteed citizens equality and freedom. It also guaranteed equality in the eyes of the law, freedom of belief and conscience, freedom to pursue scientific work, to petition and influence social law, freedom to assemble, even the right to cultivate the national language– all these elements ensured that Czech teachers were in danger of failing to achieve a specifically Czech national programme to resolve Czech national demands¹³. Due to this law the constructive political movements of the Czech representatives became weaker. However, there was a strengthening of the forces working for national emancipation, culture and scientific work undertaken by Czechs who wanted to enforce their own demands in scientific and cultural fields, because they did not have this opportunity in the political arena.

The work of groups involved in public entitlement, national preservation environmentalists, public education and other groups concerned with the preservation of the nation¹⁴ developed very quickly with the help of the new federal law of 1868. The Czech national emancipation movement was essentially founded on the concept of nationhood based on language identity. The Czech political movements referred to the concept of Czech state law, mainly as a historical model¹⁵ and, later, as an ethnic one. «The foundation of nationality is the language of the nation. Without a language it is not a nationality, it is not a nation. A nation which lost its political independence and political rights could get them back again, but if it lost its language it lost itself and died [...] the language is the soul of a nation. As much as a nation achieved with its education and understanding, thus far was its language cultivated. In the language a nation stores all its spiritual wealth»¹⁶.

¹² E. Protner, *The Development of private education regulation in the field of teacher training in Slovenia*, «History of Education and Childrens Literature», vol. 8, n. 1, 2013, p. 31.

¹³ At the end of the nineteenth century this led to the spread of pan-Slovanic thought between Czech teachers and supported co-operation with Slovenian, Croatian and Serbian teachers rather than the more obvious support for co-operation with German teachers in the Czech lands. These national barriers for Czech and German teachers increased and prevented them from co-operating. Slovanic nationals taught in lower schools and were characterised as an ethnic group who were going to play a major part in the political and social life of the nation in the near future. The personalities of the Czech and Slovakian leaders were intensively popularised in the pages of teachers' newsletters and magazines.

¹⁴ Already in the 1860s new groups were founded with the goal of popularising professional knowledge in the area of public enlightenment. These followed the enlightenment tradition and their activity was not reduced. In the 1890s, after the passing of the social law of 1867 some groups were founded which were not for enlightenment, but also national protection. These were the German *Deutscher Schulverein*, *Bund der Deutschen in Böhmen*, *Deutscher Böhmerwaldbund*, *Bund der Deutschen Nordmährens*, *Südmährens*, *Schlesische Nordmark* etc. These groups followed the activities of groups from 1848 *Verein der Deutschen aus Böhmen, Mähren und Schlesien zum Schutze Ihrer Nationalität a Verein zum Schutze der deutschen Grenzmarken im Osten*.

¹⁵ R. Petráš, *Menšiny v meziválečném Československu*, Praha, Karolinum, 2009, p. 151.

¹⁶ *České vlastenectví s německou vzdělaností*, «Posel z Budče», vol. 9, n. 32, 1878, p. 661.

In German-Austrian discussion the understanding of the nation was based on Herder's concept of the nation as a living form, an 'organic' entity termed Volk. The concept of the nation with regard to ethnic language and principles of culture as the basis of a healthy civilised society in the chosen language (Kulturnation), with the same traditions and same culture¹⁷ and the nation as a non-political concept, but as a group of people with blood relatives and gathered in groups with the same, or similar, racial features emerged in the teachings of F.L. Jahn¹⁸ (Volkskörper) which overshadowed the importance of individual values and was opposed to the freedom of choice for individuals¹⁹ and who decided matters based on their own beliefs to call themselves a political nation. This is shown in the brilliant analysis of the national revival and the German understanding of the Czechs by national historian Frantisek Kutnara in *Obrozenecké vlastenectví a nacionalismus – The Revival of Patriotism and Nationalism* (2006), «Jahn is not judging the nation as an organic cultural compact (Volkheit) but he can also see it in racial terms, which in its clear ethnic divisions is maintained permanently and passes on, through inheritance, the marks of the future»²⁰. In addition in the last thirty years of the nineteenth century the key arguments in German – Austrian political debate were voiced by those supporting a Greater German solution by calling for a pan-German interpretation of nationhood, which in turn led to demands for a higher estimation of German culture in the Austro-Hungarian Empire. The privileged position of the German nation, controlling the Habsburg monarchy, was underlined by the nationalistic voices of the German-Austrian representatives which did not fall short of anti-Semitism.

It is important to note that the Emperor did not want such developments, as the political targets of the multi-national Empire member states were not the same as those of individual national movements – German, Italian, Hungarian and all the Slavic nations. The Empire's court and Government saw the national movements as a threat to absolutist rule and the power enjoyed by the Emperor,

¹⁷ H. Mommsen, *Von Weimar nach Auschwitz*, Stuttgart, Deutsche Verlags-anstalt, 1999, p. 33.

¹⁸ Friedrich Ludwig Jahn (1777-1852) studied theology and philosophy between 1798 and 1802 in the University of Halle, Göttingen and Greifswald. After this he spent his time studying the German language in the German countryside. From 1810 he was a grammar teacher in Berlin. After the defeat of Prussia in the Napoleonic Wars and the invasion of Berlin, he could not accept the disgrace of defeat and he tried to 'enliven and awaken' the German national soul. With this in mind he created a new system, *The National Physical Education* (Deutsche Turnkunst, 1816) in addition to the national programme (*Deutsches Volkstum*, 1810) and after 1848 he became a leading member in German political life. With his teachings he greatly influenced the philosophical debate and the way the nation was educated in the concept of Völkisch. He influenced the German national revivalists, those who protected the German states and, after 1871, a united Germany, and also the German population in the Czech lands of the Empire. The thoughts of Jahn became authoritative for the leaders of the German youth groups in the Czech lands and following their models, it was believed, would ensure the safety and preservation of the Czech Germans.

¹⁹ J. Kořalka, *Co je národ?*, Praha, Svoboda, 1969, p. 27.

²⁰ J. Kutnar, *Obrozenecké vlastenectví a nacionalismus*, Praha, Karolinum, 2006, p. 206.

but mostly as a threat to the integrity of the monarchy. For this reason they tried to build against the destruction of their own concept of a supra-nation (the self-identification of individual peoples with the Empire) and extend the idea of supra-ethnic Austrianism. Austrianism and provincial patriotism essentially belonged to the traditional aristocracy who played an important part in the political and economical life of Cisleithania in the second half of the nineteenth century. Its members were active in the state services of the Empire in positions of authority.

Liberals against the conservative aristocrats and clerical power were prominent with their political programme, but this also had a national focus. The German Liberals in the Austro-Hungarian Empire were not keen, given the spirit of the revolutions of 1848 to give the Czech people their independent political and cultural rights (compared to the Hungarians, Italians and Poles), and they regarded the Czech lands as traditionally German with the belief that the «different linguistic groups» should adapt to the German-Austrian liberal goals²¹.

Very often school History textbooks skirted around perceived ‘explosive’ national themes. The History text books given to the Czech lands for schools teaching in the German or Czech languages did not advocate either German nationalist beliefs, nor their Czech equivalents. They were trying to support Austrianism (which the German and Czech teachers had no interest in and with which they did not identify) and to create the belief that these books were nationally unified documents which is apparent in many of the text books. This shows that in the last third of the nineteenth century the Empire did not allow an opportunity for the active promotion of the concept of national identity in the native population and instead promoted the view of the Empire as a kindly, benevolent ‘old man’ who held ‘his nations’ to positive relationships working for ‘their own good’.

Against the wishes of the Empire court, teachers and school educators became active participants in the formation of the nation and the key instrument of the nationalist process in the last half of the nineteenth century. In *The Theory of Nation and Nationalism* by Ernst Gellner (1925-1995)²² we can see that it was largely school institutional education and its participants – teachers and public educators who were crucial to the formation of the modern nation and development of national and civic society. At the same time it is interesting to note that the concept of national education was introduced as a tool of education and the national element was taken as an automatic aspect of education²³ that should support national identity²⁴ as a «norm and ‘natural’

²¹ J. Kořalka, *Češi v habsburské říši a v Evropě 1815-1914*, Praha, Argo, 1996, pp. 30-33.

²² E. Gellner, *Nations and Nationalism*, New York, Cornell University Press, 1983.

²³ M. Hroch, *Na prahu národní existence*, Praha, Mladá fronta, 1999 and M. Hroch, *Národy nejsou dílem náhody*, Praha, Slon, 2009.

²⁴ Minority schools from 1880 onwards served the Czech population in German-speaking

factor»²⁵. The elected national leaders were supposed to work with the groups where they were not so strongly informed about the nation and in such cases were expected to popularise the value of the nation and lead group members to self-identification with their vision of the nation and national life²⁶. Nationalist groups²⁷ schools, public educators and, most of all, the teachers were vital in

areas so that parents did not send their Czech-speaking children to German-speaking schools and vice versa. The minority schools were, from the beginning, mostly privately organised by the national school groups who attempted to give financial responsibility for the schools to the village or town, though this was not always possible. It was well known that the Czech population could not always send their children to schools which taught the Czech language because they were under pressure. If they did so they could lose their job with their employers who were usually German-speaking individuals. Therefore the whole issue of schooling became political. See more in T. Zahra, *From Christmas gifts to Orphans Pensions: How Nationalist Associations Created the Welfare State in the Bohemian Lands 1900-1918*, in P. Haslinger (ed.), *Schutzvereine in Ostmitteleuropa*, Marburg, Verlag Herder Institut, 2009, pp. 192-207.

²⁵ P. Judson, *Die Schutzvereine und das Grenzland: Aktivitäten zur Realisierung von 'Imagined Borderlands'*, in P. Haslinger (ed.), *Schutzvereine in Ostmitteleuropa. Vereinswesen, Sprachenkonflikte, und Dynamiken nationaler Mobilisierung 1860-1939*, Marburg, Herder Institut, 2009, p. 7.

²⁶ T. Kasper, D. Kasperová, *Die berufliche und nationale Emanzipation der tschechischen Lehrerschaft im letzten Drittel des 19. Jhrs. Motive, Ziele, Erfahrungen und Reflexionen*, «History of Education and Childrens Literature», vol. 8, n. 1, 2013, pp. 181-198.

²⁷ The role of the schools' protective groups were also important. In Vienna in 1880 the *DeutscherSchulverein* was formed whose target was to found German schools in nationally mixed areas in the Austro-Hungarian lands. A similar interest group was founded in 1881 in Germany with the name *Allgemeiner Deutscher Schulverein* in Deutschland. In 1886 there was a serious crisis inside the Austrian group, where, after failing to agree with the leadership, a leading nationalist, Georg von Schönerer (1848-1921) left the group. He was a self-styled patriot and nationalist who founded the Nationalist movement *DeutschnationaleBewegung*, but was also a well-known anti-Semite. He left the original group after the leadership failed to back his proposal that members should be expelled by officials acting at a local level. Schönerer and his radical, nationalist supporters from the ranks of university students wanted to be able to decide the make-up of local groups, and, more specifically, to be able to expel any members who were Jewish. After the failure of this motion he and his followers founded a radically nationalist and anti-Semitic group *Schulverein für Deutsche* which was banned by the Austrian authorities three years later. For more on this see G. Weidenfeller, *Verein für das Deutschtum im Ausland. Allgemeiner Deutscher Schulverein (1881-1918)*, Frankfurt am Main, Peter Lang Verlag, 1976.

As a reaction to these movements, the Czechs founded their own school protection group *Ústřednímaticeškolská*. This was also to promote Czech language learning in areas where there was majority German population in order to 'protect' Czech children against anti-revivalists. The group's seminars, theatre productions and bazaars were well-supported and they also published calendars, postcards and brochures with pro-Czech themes.

The above analysis is based on the study of archive materials regarding the activities of the *Deutscher Schulverein* in *Österreichischer Staatsarchiv* in Wien, Fund *Deutscher Schulverein 1880-1945*. Sig. AT-OeStA/AVA mostly the files 8-15 regarding to *Deutscher Schulvereines* in the Czech lands. The following analysis is based on archive sources from the activities of the Czech protectionist group *Ústřednímaticeškolská* in the National Archive in Prague 690 cartons 59-60 and 67-77.

ensuring that the concept of the nation found followers and then formed groups who appeared to be nationally unified²⁸.

In conclusion, it can be seen that in the German speaking areas in Cisleithania the concept of state-civic education did not take root, however, what was developed was the model known as *Völkische Erziehung* or *Heimatliche Erziehung*, with the support of «militant attitudes of German nationalist agitators»²⁹. In addition, Czechs rejected the concept of Austrian-patriotism and even the idea of national identity when Czechs were removed from the higher positions in the Austro-Hungarian Empire. Furthermore they viewed the new form of the Empire with disappointment as one that was deaf to their political and constitutional demands. It is definitely the case that «concepts of national development in the Czech and German areas of the Empire were designed from different initial bases»³⁰.

National education in extra-curricular organisations at the beginning of the twentieth century

Because the subject content and teaching of History and other subjects in elementary schools were controlled by the central administration there were no intensive developments of *völkisch* education or nationally focused concepts of education in the Empire's schools. It was very different in the extra-curricular education of young people of high school age or later for apprentices and young workers³¹. In the youth groups, where their activities could not be controlled by the state, ideas of national education played a much greater role.

In Czech youth groups (*Sokol*³² and *Junák* – the Czech version of the Scouts) we can see the idea of national emancipation was at the heart of their programmes of self-improvement for young people in the professional, physical

²⁸ In addition the development of tourist groups not only meant a tendency towards a healthy life-style and the development of the body. Interest in physically experiencing the beauties of the nation led to a greater awareness of the nation's culture and traditions which were supposed to be preserved in the countryside. The countryside was known not only as a centre of experiences, but also as a place of professional study growing from its identification with home or ethnology. See more P. Judson, M.L. Rozenblit, (edd.), *Constructing nationalities in East Europe*, New York, Berghahn Books, 2005 and P. Judson, *Guardians of the nation: activists on the language frontiers of imperial Austria*, Cambridge, Harvard University Press, 2006.

²⁹ V. Houžvička, *Návraty sudetské otázky*, Praha, Karolinum, 2005, p. 35.

³⁰ J. Balcarová, *Jeden za všechny, všichni za jednoho. Bund der Deutschen a jeho předchůdci v procesu utváření sudetoněmecké identity*, Praha, Karolinum, 2013, p. 38.

³¹ B. Stambolis (ed.), *Jugendbewegt geprägt*, Göttingen, V&R unipress Verlag, 2013, pp. 14-15.

³² For more on the Slavic ideas in the *Sokol* group. See C.E. Nolte, *All For One! One for ALL! The Federation of Slavic Sokols and the silure of neo-Slavism*, in P. Judson, M.L. Rozenblit (edd.), *Constructing nationalities in East Europe*, New York, Berghahn Books, 2005.

and aesthetic fields. The Czech nation could, it was argued, excel with even greater results than other states in the Empire and especially more so than the Germans in Austria-Hungary.

In the German youth groups in the Czech lands (mostly the German national conservative group³³ known as *Deutschböhmischer Wandervogel*) there developed the concept known as *völkisch* education – although there were many variations and differing intensities of this key concept. The *völkisch* movement was supposed to be the tool for; organic unity, for an individual to ensure his revival as a «new person»³⁴ for the release of the people from the handcuffs of unhealthy liberalism or internationalism – to help leave the liberal political competition and enable the establishment of work by *völkisch* educators. The unity achieved by solidarity over-rode the social differences, which might have caused its members to distance themselves from one another. Such a united front also awoke feelings of friendship, closeness and support. The aesthetic picture of society was an ideal which *völkisch* education was supposed to follow. National or organisational solidarity (*Gemeinschaft*) was supposed to win over the concept of civilisation (*Gesellschaft*) which was in *völkisch* teaching regarded as rational, cold, technical and politically liberal.

There is another year behind us, the Germans in the Czech lands, the last year brought major changes. The national battle between both nations is still not ended because if there will be a battle ending in victory, our battle for independence from the Czech majority on the provincial councils, then there is another battle ahead where we will have to go forward with greater resilience than was evident so far, the battle of competitive ability and general dominance in agriculture and cultural areas. In this battle the nation will win which is more precious. Which nation is more valuable? The one which has most of the healthy men, women and children, the one which has smart and deep souls, the nation which knows more and can. [...] Do you want the German nation to be dominant? Yes? Then you have the duty, the sacred duty to be part of these improvements and the development of the nation³⁵.

³³ See also S. Breuer, *Anatomie der konservativen Revolution*, Darmstadt, Wissenschaftliche Buchgesellschaft, 1995, and F. Stern, *Kulturpessimismus als politische Gefahr*, München, Deutscher Taschenbuch Verlag, 1986.

³⁴ More in B. Stambolis, *Der Mythos der Jugend. Ein Aspekt der politischen Kultur im 20. Jahrhundert*, Schwalbach, Wochenschau Verlag, 2003; T. Koebner, R.P. Janz, F. Trommler, *Mit uns zieht die neue Zeit. Der Mythos Jugend*, Frankfurt am Main, Suhrkamp, 1985; H. Giesecke, *Vom Wandervogel bis zur Hitlerjugend*, Weinheim, Juventa Verlag, 1981; U. Hermann (ed.), *Mit uns zieht die neue Zeit. Der Wandervogel in der deutschen Jugendbewegung*, Weinheim, Juventa, 2006; H. Pross, *Jugend, Eros, Politik. Die Geschichte der deutschen Jugendbewegung*, Frankfurt, Büchergilde Gutenberg, 1965; W. Kindt (ed.), *Grundschriften der deutschen Jugendbewegung. Band I-III*, Düsseldorf 1963, 1968, 1974; P. Nasarski, *Deutsche Jugendbewegung in Europa*, Köln, Verlag Wissenschaft und Politik, 1967.

The youth movement was, in the socially cultured German world a part of wider social tendencies to reform the whole way of life: K. Buchholz, R. Lachota, H. Peckmann, K. Wolbert (edd.), *Die Lebensreform. Entwürfe zur Neugestaltung von Leben und Kunst um 1900*, Darmstadt, Häusser Verlag und anabas Verlag, 2001; D. Kerbs, J. Reulecke, *Handbuch der deutschen Reformbewegungen: 1880-193*, Wuppertal, Hammer Verlag, 1998.

³⁵ «Burschen heraus», n. 7-8, 1913, p. 5.

The picture of the nation in the textbooks of elementary school (*Obecná škola and Volksschule*) and lower-secondary schools (*Měšťanská škola and Bürgerschule*) in the last third of the nineteenth century and on the cusp of the twentieth century.

Teaching subjects for schools were determined by the decree of 1869 which was specifically for primary and lower-secondary schools, whilst curriculum content was stipulated by what was known as the Code of Conduct for Teaching in Ordinary Elementary schools from August 1870. Also within the scope of this ruling were the specified teaching targets and the educational goals established for History as a subject (to be taught jointly along with Geography).

The target of Geography and History education is that students would know their own home-land and the most important stories of Austria and her subjects and which would wake in them the love of their home and home-land and their devotion to the Emperor and the dynastic family, and as well that the beginnings of the science of the universe will be continued in the vision of students' souls and their hearts will be cultivated [...] the students will know the history of the places where they live, their own home and home-land and that they will achieve the most important knowledge for general thinking which is the history which is linked closely with their home-land³⁶.

The aim of History teaching, along with Geography, as well as the division of time to be devoted to the teaching of the subjects, were set until 1918. In the elementary schools at the highest level (in the fifth, sixth, seventh and eighth years) there were two hours a week given to History and Geography and in the lower-secondary schools (in the sixth, seventh and eighth years), three hours a week. In the first year and mostly in the second level of the elementary and lower-secondary schools (in the second, third and fourth years) subject matter was taught thematically, mostly in natural history and language education where the main text book was a reading book.

Teaching content was also specified by the regulation from the Minister for Education on 18th May 1874 (N. 6549) in which it was said that «the sense of history is to give general appreciation to those people and those events which in a beautiful way helped the development of civilisation in general and especially in the home-land»³⁷. At the same time this education should help to develop the character of students and their love of the home-land. For this reason there should be legends and stories taught from Austrian history (in the second, third and fourth years) and events from Austrian history taught in chronological order; the most important inventions, the events of the Middle Ages, tales from general history (if they were in common with Austrian history) and

³⁶ *Nařízení ministerstva záležitostí duchovních a vyučování z 20. srpna 1870 č. 7648*, in. J. Král, *Sbírka říšských zákonů školských*, Praha, Náklad Aloisa Wiesnera, 1894, pp. 329-330.

³⁷ *Věstník vládní u věcech škol obecných království Českém 1874*, Praha, Zemská školní rada, 1874, p. 126.

other content including the rights and duties of the Empire³⁸. In the same way targets were formulated for the curriculum in lower-secondary schools from 1907³⁹. The curriculum in those lower-secondary schools (county secondary school) using the Czech language from 1910 was no different and there was no acknowledgement of the needs of schools that were specifically Czech⁴⁰.

If we analyse selected, revised and widely-used History text books in elementary and lower-secondary schools (county secondary schools) using Czech and especially with German as their teaching language we see the following picture of the curricular and thematic features of national education⁴¹. Text books for the lower-secondary schools were reviewed cyclically every three years, deepening and widening knowledge. Czech and German schoolbooks gave significant attention to 'the season of the modern times'. This was defined for the most part as the period after 1740 when Maria-Theresa began her reign. A key topic was the portrayal of the French Revolution, the subsequent developments in France and the period of the Napoleonic wars. The Revolution was introduced as the consequence of the extravagant policies of Louis XV, but mostly as a very negative result of his poor rule of the people and the 'common rabble'. Revolution was, of course, judged very negatively and against this the enlightened rule of the Emperor was glorified as that of a monarch who; loved his people, was self-sacrificing, gracious, enlightened and reform-minded, a ruler who always knew the limits and the best way to lead the Empire in its development. Text books left no doubt that the correct way to lead the Empire was through enlightened-absolutism and not revolution – which had resulted in the murder of the French King, his wife and ended in terror. The answer to this confusion of ancient rights had to be found in war when the Habsburg monarchy stood firm against Napoleon. The Emperor's power was again highlighted as a guarantee of his subject's rights and for their protection. Revolution in 1848 was characterised as a foreign revolt which barely involved Austria. An individual could be bewitched by the descriptions of revolutionary action in the textbooks, but in the end it was shown that it was not yet time for the citizens of Austria to

³⁸ *Ibid.*

³⁹ *Nařízení ministerstva kultu a vyučování z 15. července 1907 č. 2368*, in *Věstník vládní u věcech škol obecných království Českém 1907*, Praha, Zemská školní rada, 1907.

⁴⁰ *Osnovy učebné pro měšťanské školy chlapecké a dívčí s českou vyučovací řečí království Českého nařízením Zemské školní rady (schválené vídeňským ministerstvem) z 8. června 1910 č. 31 236*, Praha, Císařský královský školní knihosklad.

⁴¹ The following textbooks were analysed: F. Šujan, *Učebnice dějepisu pro měšťanské školy*, III. díl (*History Text Book for lower secondary school*, part 3), Praha, I.L. Kober, 1899; A. Gindely, J. Vávra, *Učebnice dějepisu pro měšťanské školy*, III. Díl (*History Text Book for lower secondary school*, part 3), Praha, Tempský, 1888; *Bilder aus der Geschichte für die Knabenbürgerschulen*, III. Teil, Wien und Prag, Tempsky Verlag, 1893; M. Woynar, E. Czuczka, *Woynars Lehrbuch der Geschichte für die Oberstufe der Mittelschulen*, 2. and 3. Part, Reichenberg, Verlag Franz Kraus, 1924; A. Rebhan, *Lehrbuch der Geschichte für die unteren Klassen der deutschen Mittelschulen in der Tschechoslowakischen Republik*, Reichenberg, Stiepel, 1923.

be given a constitution other than that formulated by the Emperor Franz Josef in 1861. The whole description of the transition from an absolute-monarchy to a constitutional model, the foundation of Austria-Hungary, the question of the nation's demands and the movements within individual nations for greater freedom (mostly individual countries within Cisleithania) showed that the main author of all change was the enlightened Emperor exercising his power wisely. The Emperor only wanted what was best for the Austrian homeland and what was best for Austria was best for his people and his nations. National questions and desires were acceptable until they threatened an end to the peaceful unity and co-existence of the states within the Habsburg Empire.

In the textbooks for German schools in the Czech lands there was no thematic reference to the Czech national movements. Nor were there any leading Czech personalities from Czech culture or political life. Textbooks for schools using Czech as the teaching language contained a one-page summary of the important members of Czech political and national life in the second-half of the nineteenth century. There was not even a single sentence regarding the problems of building the national identity of individual states in a multi-national Empire.

The question of national education and civic education after the foundation of Czechoslovakia

On the 28th October 1918 the Czechoslovakian Republic (C.S.R) was founded as a Parliamentary democratic state. However, the new state's form meant an absolutely new social and political structure for the two biggest nationalities in the Czech lands. If we simplify the emerging situation then it can be said that the populace in the Czech lands who retained their self-image as German nationals moved over-night from a privileged state group to one which saw itself as 'endangered' by the success achieved by the Czech nationalist movement in the establishment of the new country. Germans now had the same rights and equal standing with all other groups, subjectively feeling fundamentally endangered by the foundation of the state. Conversely, the Czech population witnessed a dream becoming reality – an independent state – that the leaders of the state schools and those involved in civic education supported strongly.

The division between Czech and German politicians and teachers' leaders was clearly evident. Immediately after the declaration of Czechoslovakian independence, German members (including social democrats)⁴² became intent on separating the German borderlands of the Czech state and founding

⁴² Z. Kárník, *České země v éře První republiky (1918-1938). I. díl.*, Praha, Libri, 2000, p. 71.

individual provinces and attaching them in the North and West to Germany and to Austria in the South⁴³.

Disruption of the historic unity of the Czech lands was, of course, rejected by Czechoslovakian representatives and the area was occupied by troops. German members hoped that peace treaties could still bring changes to the political order. The key to the whole situation can be seen in two particularly important opposing factors. Firstly, there was a growing lack of trust on both sides and the German population was suspected as being disloyal to the new Czechoslovakian Republic. Secondly, from this situation the Czech members exploited the circumstances and met in what were known as Revolutionary meetings without any German representation whatsoever. Only the election of 1920 brought adequate political representation for all nationalities in Czechoslovakia. By that time there had already been many major laws agreed and enacted. In 1920 the Constitution of the Czechoslovakian Republic was formulated regarding the German minority and this was completely decided without recourse to the German representatives. This situation left deep scars which barely healed and equally poor was the trust between the two sides which was evident from the actions of the German Parliamentary parties⁴⁴, in active state-co-ordinated politics⁴⁵. It is important to note that Czechs «originally asked the Germans to take on federal roles, but they did not wish to as they did not want to be a part of the Republic. When they changed their minds, at the last moment, the Czechs rejected them»⁴⁶. Petráš concludes that the absence of the minorities in the revolutionary national assembly was «caused by their negative attitude to the state more than Czech chauvinism»⁴⁷.

The same situation pertained for German teachers in elementary and lower secondary schools with their rejection of the newly-founded Republic which was not only seen as a prison for German nationals in the Czech lands, but also as a tool to destroy them. «It is clear what it would mean for us, this kind of situation when we are hammered into their Slavic majority. It would mean permanent disintegration of the German nationals and the attachment of the Sudeten-Germans to Czechoslovakia. That we cannot carry on in this situation for our own good, that's clear enough»⁴⁸. German teachers in the Czech lands were unable to imagine, after the beginning of the Czechoslovakian Republic, that they would realise their national goals in a Czechoslovakian state, where

⁴³ V. Olivová, *Dějiny první republiky*, Praha, Karolinum, 2000, pp. 74-78.

⁴⁴ E. Broklová, *Politická kultura německých aktivistických stran v Československu 1918-1938*, Praha, Karolinum, 1999, pp. 100-116.

⁴⁵ The German political party joined the Government in 1926 and from that time the German parliamentary party took responsibility not only for the legislative power, but also the executive, until 1938, when they were part of the coalition government. More see V. Kural, *Konflikt místo společenství*, Praha, Nakladatelství R, 1993, pp. 58-66.

⁴⁶ R. Petráš, *Menšiny v meziválečném Československu*, Praha, Karolinum, 2009, p. 180.

⁴⁷ *Ibid.*, p. 171.

⁴⁸ J. Schindler, *Der Tag der Deutschen*, «Freie Schulzeitung», 46-47, 1918, pp. 704.

they were isolated from the German majority. Völkisch thoughts and goals were in that ‘year of destiny’ very prevalent. The «völkischthoughts» (Völkischer Gedanke) which were born in the revolutionary year of 1848, now triumph. «The stronger nation’s self-confidence won’t suffer any more in this situation whereby the settlement area is divided by artificial political borders. One nation – one state – one language, that is the slogan of the present»⁴⁹.

The situation was exacerbated by the consequences of the Minority School Law in 1919 which allowed in a simplified way for the founding of schools in areas where the language of the school was not the same as the majority language of most living in the area. This law led to the foundation of many Czech schools in German-speaking border areas which was a provocation to German representatives and those in the locality. The law received a great deal of criticism and rejection on the part of the Germans even though it gave an opportunity to educate in Czech to those for whom it had previously been forbidden. At the same time many German schools were closed or abandoned because, from the point of view of the law, they were surplus to requirement and so were joined with the closest German alternative. This happened very often in sub-mountainous and mountainous regions where the distances to school were prohibitive.

Instead of calming the situation and debate on the matter, there emerged after 1918 in the German population, a very critical position against school education in Czechoslovakia coupled with their wish to grant schools their own cultural autonomy which the Czechoslovakian government did not want to accept. According to the Government, all citizens should be equal in the law and there could not be a group – or national minority– with different rights. The question of German school autonomy was continually returned to and it was emotionally ‘traded upon’ and used in critical political moments by the German side. This resulted in increasing complaints regarding the actions of the Czechoslovakian state; that they cancelled German schools unwarrantedly, that they thoughtlessly joined German schools and ultimately showed no understanding of the German position in the CSR.

These complaints went not only to the Ministry of Education and National Enlightenment in Prague, but also to an international audience. The German members of Parliament and Senators called in 1920 on The League of Nations in Geneva⁵⁰ regarding non-compliance with promises made in the Minority Covenant⁵¹. The complaint was not taken for discussion but in 1923 it was

⁴⁹ *Volksheerrschaft und Schupolitik*, «Freie Schulzeitung», 46-47, 1918, pp. 709-710.

⁵⁰ *Denkschrift der Abgeordneten und Senatoren des Deutschen Parlamentarischen Verbandes der tschechoslowakischen Nationalversammlung an den Völkerbund betr. der Verletzungen der Minderheitsschutzbestimmungen des zwischen den alliierten und assoziierten Mächten einerseits und der Tschechoslowakischen Republik andererseits am 10. September 1919 in Saint Germain abgeschlossenen Vertrages*, Prag, [s.n.], 1920.

⁵¹ Czechoslovakia committed in the Minority contract signed with the Peace treaty in Saint

followed by a second complaint⁵². The Czechoslovakian state worked hard to answer the international complaints even though they argued practically that the inter-war situation with regard to education gave the German-speaking population an extraordinarily preferential position regarding High Schools and that after the beginning of the CSR there had taken place the 'levelling' of society for both nationalities in the Czech lands. This made German parents and leading representatives for public and cultural education extremely bitter. There were also complaints from Czechs about certain German teachers who were supposed to educate in a spirit of even-handedness, although they attended anti-Republican events despite promising their loyalty to the new country.

Turning our attention to national and civic education, from the very beginning of the country's existence, immediately in 1918 a new law was formulated which allowed parents to decide if their child would attend lessons in religious education. A second important decree which was known as the Little School Law was passed in 1922 which introduced the compulsory subject of civic education. In Republic schools it was decreed that space on the timetable should be given to civic state education not only within History or other subjects, but as a discrete compulsory subject.

Therefore schools once again became the battleground for national ideas (as had been the case before 1918) rather than a peaceful forum for state civic education. To prevent this argument going too far and to maintain schools' loyalty to the ideals of Czechoslovakia, the state paid particular attention to the inspection of school education. However, this had minimal impact on the youth organisations which became very important socialising influences for Czech and German-speaking young people in the CSR. German youth was united in national conservative organisations and also in Catholic and Socialist groups. Czech youth was not socially divided in this way – the biggest groups; Sokol, Junak and Orel partly reflected social differences but there was a prevailing tendency of joint education for all young people from different social backgrounds and in this way Czech social cohesion was maintained.

It should be noted that regarding the issue of national education, that the activities of German conservative national youth group leaders particularly focused on education, as these people were often teachers in elementary and lower secondary schools. National values were spread in the greatest part by the Sudeten deutscher Wandervogel group which strongly controlled their activities and teachers' practise. These leaders were continually using aggressive völkisch rhetoric but they also wanted to extend this with additional concepts

Germain on 10th September 1919 that they would provide support and freedom to national minorities for cultural and social activities in their schools. In addition all citizens were guaranteed the same civic rights regardless of language, race or religion. See more R. Petráš, *Menšíny v meziválečném Československu*, Praha, Karolinum, 2009.

⁵² Reg. The National Archive in Prague The Ministry of Education and Enlightenment 1918-1938 file number 376.

of struggle as they argued that the 'old generation' of völkisch teachings had missed their chance, had placed the German people in deep crisis and had not prevented the German 'catastrophe' in the Czech lands. For this reason the new generation of young leaders was sure that German youth had to internalise a new model of national education, which they called Nation political or tribal education.

In tribal education it is possible to see even more clearly a sense of identification with the concept of the nation as a part of tribal solidarity inherited through blood and race. This was unacceptable for Czechoslovakian representatives and in democrats' and Republican's eyes it was impossible to be achieved. The concept of national political education was based on tribal solidarity and supposed that young people had to be led to political enlightenment and thereby achieve the salvation of the German tribe in the CSR. It had to replace the party political conflict to reach its ultimate goal – the total and final national union of all Germans in the Czech lands through the 'third way'.

Due to this, education was given a broader significance, not only for societal needs but also political. The border between education and politics was crossed and education became a servant of the politically engaged leaders of the 'young' generation. These youth leaders developed a rejuvenated education style and consciously expounded the idea of national political education. This stood in direct opposition to the concept of stable political civic education which was propounded by the Czechoslovakian state. The new belief pervaded the work of all German conservative youth groups, elementary and lower secondary Schools, as most of the teachers had absorbed the idea through social activities (from the outset as members and later as their leaders).

It was not possible to harbour these ideas or to be seen to be discussing them in state political education. Czech teachers in 1918 registered the basic principles of republic, state, school and political education. The school system needed reform and the old monarchist view changed to embrace the concept of united though internally-differentiated schools and social-democratic schools. Schools were expected to move from individual educational needs (which is the 'internally-differentiated' education) to institutions which should prepare individuals for an active civic life in a democratic republic (so-called 'social schools'). The most well thought through reform of schooling in the 1930s was realised by pragmatic Czech pedagogical principles and known as the 'social school'. This achieved a good standard of education by the use of; school councils, class-based self-government, school public meetings, meetings with members from surrounding villages and representatives of society, the active production of school newsletters and magazines and use of school radio. Every school should have its own chronicle and claim allegiance to common symbols such as the flag, national anthem and national emblems. This reform took its name from its pedagogical architect and creator, Václav Příhoda (1889-1979) – and so it was known as the Příhodareform. He was a very close colleague of

John Dewey when he attended Columbia University in New York and acted as Dewey's assistant⁵³. In the 1920s it proved possible in Czech pedagogy to found a strong new tradition which came from home positivism, an idea from Herbert Spencer and later positivists and which was based on American pragmatic pedagogy.

This tendency towards American quantitative and pragmatic pedagogy was revolutionary in Czech pedagogical thinking though it was not so simple and unequivocally supported. Some in the profession pointed out the shallow philosophical aspect of pragmatism and also the pitfalls of quantitative pedagogy's limitations of measuring in social science «and on the naïve trust in empirical science to produce welfare and happiness»⁵⁴. Even through all these differences Czech teachers followed the concept of united internally-differentiated and social schools⁵⁵.

In this reform the Czechs were joined by a group of Germans in the elementary and lower secondary schools. It was an interesting and open group which was even closer to the international pedagogical reform movement – New Education Fellowship and most of all, the German group Internationaler Arbeitskreis für Erneuerung der Erziehung which they corresponded with and met. In 1925 the German teachers produced the Free Working Group of German teachers of Elementary and lower secondary school (Freie Arbeitsgemeinschaft deutscher Volks- und Bürgerschullehrer)– and in 1927 the well-known reform-minded group, known as The German Working Group for New Education (Deutscher Arbeitskreis für Neugestaltung der Erziehung).

Most of the members of the Free Working Group of German Teachers were in contact with the Czech central reformers and leading members of the Příhoda reform group. However, in 1930 there was a break between the groups seeking a joint solution and the reforms came to be regarded by German teachers as the Americanisation of pedagogy, suppressing the specific needs of German schools⁵⁶. This was linked to criticism of the reforms in Czech pedagogy and also the fact that German teachers had expressed a strong belief that national schools could

⁵³ Václav Příhoda absorbed the theories of Behaviourism and Pragmatism from his time at university in the USA (Carter Harrison Technical High School Chicago and Columbia University New York) in the years between 1922-1926 – with a break for a year in 1925 when he lectured in the Philosophical Faculty in Charles University in Prague (scientificstays by E.L. Thorndike, Ch.H. Judd, F.N. Freeman, W.E. Blatz and J. Dewey). After his return to the Czechoslovakian Republic he was seen as a believer in quantitative methods in psychology and pedagogy. He was also a proponent of rationalisation and Taylor's theory of scientific management in pedagogy and education. He translated the work of E.L. Thorndike and other Behaviourists into Czech.

⁵⁴ A. Rajský, *Moderna*, in B. Kudláčová, A. Rajský (edd.), *Europske pedagogické myslenie*, Trnava, Veda, 2012, pp. 18.

⁵⁵ T. Kasper, *Die deutsche und tschechische Pädagogik in Prag*, in S. Höhne, U. Ludger (edd.), *Deutsche - Tschechen - Böhmen: Kulturelle Integration und Desintegration im 20. Jahrhundert*, Wien-Köln-Weimar, Böhlau Verlag, 2010, pp. 19-32.

⁵⁶ T. Kasper, *Výchova či politika: Úskalí německého reformně pedagogického hnutí v ČSR 1918-1933*, Praha, Karolinum, 2007.

not be based on foreign models. The school should respect the specification of the nation and it must serve it as if it was decreed by the official announcements of the biggest teachers' organisation, the German Association of Teachers in the German Republic (Deutscher Lehrerbund im tschechoslowakischen Staate) which saw the actions of the Czech Minister for Education as premature and not compatible with the wishes of German members. The Association suggested that there should be the foundation of separate national committees (Czech and German) which would work together on the reform and produce two different curricula for Czech and German schools. This would take into account the German specification as seen in *völkisch* ideas and it would not be 'only' a translation from Czech material which was contradictory to German tradition. «The adjustment of the national desires required other subjects such as natural history, civic education and History»⁵⁷. In this atmosphere the leader of the group, Eduard Berndt, announced in January 1930 could not be reformed by nationally foreign models so distant from German traditions. German schools should immediately leave the foreign model and turn to the German pedagogical tradition – this was the only way that German schools could be protected from a loss of national identity and mechanisation. If they followed this course the schools could stay as an organic part of the national united society⁵⁸. The opportunity for common school reform and the concept of civic education in all the Republic's schools was dashed in the 1930s. Czechoslovakian schools did not receive a second chance. Until the period of economic crisis the political situation in the CSR deteriorated with the development of German nationalist movements – the foundation of Sudeten Deutsche Front in 1933 and the Sudeten Deutsche Partei in 1935 which went on to become the strongest party representing the German population in the Czech lands and which, after many 'dramatic' situations and the signing of the Munich agreement in 1938 'saved' German civilians from the Czech dangers by taking them into the Third Reich.

Jewish National Education

After the founding of the new state, the calls for Jewish national education became even stronger. It was said that the number of Jews registered as Jewish nationals was low – in Czech it was only 0.17% of the population, 0.58% in Moravia – Silesia. On top of this the newly founded nation did not allow Hebrew as the mother language, because Jews mostly communicated in German

⁵⁷ E. Berndt, *Wiederaufbau unserer Schule auf Grund neuzeitlicher Erziehungsgedanken und neuer Lehrpläne*. «Beiträge zu Erziehung und Unterricht. Beilage zur Freien Schulzeitung», 1930, pp. 1-5.

⁵⁸ *Ibid.*

or Czech. This realisation led Jewish children to prefer to attend elementary and lower-secondary public schools⁵⁹. In the First Republic we cannot find even one school with Hebrew as a teaching language. (The situation in Slovakia and, even more so in sub-Carpathian-Ruthenia, was different.) Jewish school leaders wished to open private Jewish schools, but their numbers were very limited⁶⁰. During this time the Zionist movement was strengthening but it was in a difficult position when it was realised that without Jewish schools it would not achieve its targets⁶¹. The understanding of Hebrew was minimal amongst young people and the teaching of Hebrew in Czech schools was impossible and so Jewish education should be achieved by the core curriculum and the soul of education. In addition the Zionist way of education should not, according to the leading members of the community, prevent students from being exposed to other curricula because they realised that their faith provoked a sense of something foreign in non-believers which was fertile ground for anti-Semitism⁶².

Practical Zionist or Jewish national education was dealt with, not in schools, but in the extra-curricular education of young people in youth groups. They tried to prepare a new Jewish nation by utilising the model proposed by Theodor Herzl's Jewish State (*Judenstaat*, 1896) and they attempted to strengthen the renaissance of Jewish culture⁶³ in conditions of a secular society. This was promoted in this period amongst Zionists (and not just in Prague) led in this respect by Martin Buber who proposed the solution of «the revival of the Jewish tribal nation through language, manners and art»⁶⁴. He believed this would be achieved through education in the Hebrew language, in folk songs, dance, traditions, festivals, legends and in Jewish beliefs, support for physical education and fitness linked with Jewish national feelings. The Jewish national education system supported the collective awareness of the conscious need for society

⁵⁹ Jewish students preferred the county schools (lower-secondary schools) and most of all the lower level of grammar schools where the percentage attending was much higher than in general society. In the inter-war years this meant that most such schools in the Czech lands were Czech speaking. In Moravia in 1921 attendance at such schools was lower than numbers attending German-speaking schools. In 1930, surprisingly, the opposite situation occurred and Czech schools were preferred in Moravia as well. High schools were dominated by Jewish schools using the German language and this prevailed until the crisis of 1933 with the rise of German nationalism and anti-Semitism. See more D. Kasperová, *Erziehung und Bildung der jüdischen Kinder im Protektorat und im Ghetto Theresienstadt*, Bad Heilbrunn, Klinkhardt, 2014, pp. 38-40.

⁶⁰ A Jewish infant school using Czech as the teaching language opened in Prague in 1920, followed by an infant school and grammar school in Brno. In Moravia, where Zionism was stronger, more Jewish schools existed.

⁶¹ E. Drachmann, *K otázkám židovského školství*, Brno, Spolek Židovská škola, 1936, p. 6.

⁶² *Ibid.*, p. 7.

⁶³ I. Meybohm, *Erziehung zum Zionismus*, Frankfurt am Main, Peter Lang, 2009.

⁶⁴ M. Buber, *Das jüdische Kulturproblem und der Zionismus*, in I. Schön (ed.), *Die Stimme der Wahrheit*, 1905, pp. 203.

linked with Buber's «strengthening individualism [...] and collectivism»⁶⁵. Cultured Zionists placed faith in the positive content of the Jewish national identity⁶⁶ where the main goal they understood was the development of the Jewish soul's heritage, mainly in culture and traditions in education. There were a few Jewish youth groups in existence during this period, among these the most significant were Bar Kochba, Macabi and BlauWeiss which after 1923 was known as Techelet Lavan. The divergence in the direction of Jewish education proved later in the tragic conditions of life of the Jewish population during the Second World War in the Terezín ghetto: «In the ghetto the children were brought up in the spirit of Zionism, of community spirit of scouts, Sokol (sporting organization), in the spirit of Jewish assimilation, but also in the spirit of education to Jewishness»⁶⁷.

National education – its targets and tools in lessons and text books of elementary and lower-secondary schools after the founding of a separate Czechoslovakia

After the beginning of a separate state, the external view of the school system was not altered but it was necessary to modify the educational targets and curriculum regarding; reading books in general schools, the standard of text books in civic education and History in the newly –founded Republic's schools.

We now turn our attention to the issues of civic and national education. With the regulation of 13th July, 1922 (Cl Number 226) a new subject of civic education was introduced to lower-secondary schools. It is important to note that the question of civic education was not limited to the subject area and the age group of the students aged 10-14. The issue of the education of the citizen was also understood as being moral education and so it was also a target for the first and second level of elementary schools:

If we are bringing up citizens for all aspects of communal life we cannot neglect their moral education, because it will never be about educating people for civic situations, it will mostly be about the education of good, moral characters – citizens [...] The discipline of citizens and moral education are an inextricably linked couple in the education and schooling systems which is vital in school⁶⁸.

The question of moral education was very strongly connected to the individual:

⁶⁵ B. Kudláčová, *Človek a výchova*, Trnava, Trnavská univerzita, 2007, p. 128.

⁶⁶ K. Čapková, *Češi, Němci, Židé?*, Praha-Litomyšl, Paseka, 2005, p. 188.

⁶⁷ D. Kasperová, *Problems and the course of education in Terezín Ghetto*, «History of Education and Childrens Literature», vol. 9, n. 1, 2014, pp. 684.

⁶⁸ J. Černý, *Nauka občanská a mravoučná ve škole národní*, Praha, Ústřední nakladatelství a knihkupectví učitelstva československého v Praze, 1922, pp. 45-46.

Morality, that's the character of a human being; adherence to principles, decency of all people in their thoughts, speech and actions, harmony of theoretic moral principles with the reality of behaviour and manners consistent and the same on every occasion, an active expression of all the internal mind – in one word, character. The moral person – all their actions and when that action is conscious, enlightened by sensible reality then it is the fruit of will and morality is on the level of a higher perfection – it has a higher value because it knows what it wants and why it wants it⁶⁹.

Similarly we can read:

the nation is us, each of us. We will show love to the nation through self-improvement. Each of us should know most of all the history of our nation and secondly, we have to know our mother language and speak through it. The love for our own nation we would prove or if we really know our own home-land. That's why you will be walking through your home, your shire and on holiday, travel through our beautiful Republic⁷⁰.

The goal of civic and moral education⁷¹ was defined, «by the moral education in school it is important to look after the purity of its purpose and not include the inclinations of; politics, anti-church movements, anti-beliefs, socialist or multi-party beliefs. It has to be clearly objective but still not cold and dry»⁷². This idea is also shown in the curriculum for lower-secondary schools for 1932 and for elementary schools from 1930 and 1933. In the curriculum for 1930 the goal of civic education is described as follows:

it is bringing up young people to democracy, to love their fellow-man, the nation and republic, to reciprocal tolerance and respect it is preparing you to understand civic rights and duties and it is developing all characteristics which build the base of a good and noble disposition. Civic study and education is striving to develop mature, democratic Republicans who not only correctly understand the foundation of social and state forms in the Czechoslovakian Republic and other states, but who have a strong will to self-develop. It teaches young people to show respect and appreciation for different religious beliefs and different nationalities⁷³.

It is clear that civic education was seen as a moral education which should become the conscious norm behind every person's actions. «Teach for life, school to be for life, everyone should feel that school and life should be in proportion, active and beneficially participative»⁷⁴. Civic education was supposed to be founded on the basis of civic life. Which meant at this time that the future citizen should realise that civic life and civic solidarity were important and personally beneficial. It was important to prepare the citizen for civic action, to persuade him or her of the meaning and purpose of organisations in civic life of the crucial

⁶⁹ *Ibid.*, pp. 4-5.

⁷⁰ J. Ledr, J. Hořčíčka, *Mladý republikán IV.*, Praha, Česká grafická unie, 1924, pp. 2-3.

⁷¹ Černý, *Nauka občanská a mravoučná ve škole národní*, cit., p. 97.

⁷² *Ibid.*, p. 44.

⁷³ *Věstník ministerstva školství a národní osv ty 1930*, Praha, MŠANO, 1930, p. 177.

⁷⁴ Černý, *Nauka občanská a mravoučná ve škole národní*, cit., p. 33.

importance of the order of norms and the importance of responsibility in the fulfilment of duties. This meant that teachers and schools should be in contact with practical life – with the town, the work of citizens, with companies, with culture and history. Teachers should support practical student self-government, student meetings, school printing of material and schools broadcasting⁷⁵. This should produce the teaching situation which would allow pupils to develop their own moral sense and sensibility, to develop conscience. In the lower grades teachers should use dramatization, examples, symbolisation of situations from everyday life⁷⁶. Teaching should be done through rhymes, fairy stories, legends and moral axioms.

If we analyse the textbooks for civic education for elementary and lower-secondary schools in the time of the First Republic, we can see that the defined targets were elaborated upon in individual areas of study. In Czech textbooks⁷⁷ attention was given to ensure a link between civic and moral education. The chosen themes had to be concrete and drawn from the life of the child so that they reflected what a child experienced and understood. All themes of civic education should lead to the moral development of the child as an individual. In German text books for civic education⁷⁸ themes in the curriculum were also discussed as detailed above, though teaching did not stress the moral development of the individual. Themes were more the result of ‘professional discourse’ on civic ethics and behaviour. Pupils were expected to discover; what democracy is, what a state is, what kinds of state forms they knew, what a nation is, national feeling, the problems of multi-national states and the protection of national and religious minorities. It was not about ensuring the moral development of the pupil and the principles of his every-day actions, it was more concerned with informing the way of inculcating the chosen themes.

Examining changes to educational goals and content regarding History teaching in elementary and lower-secondary schools after 1918 we must focus on the regulation from the Ministry for Education and National Enlightenment dated 7th July, 1919 – Number 25256⁷⁹ where the purpose and content of History teaching was outlined:

⁷⁵ *Ibid.*, p. 37.

⁷⁶ *Ibid.*, pp. 86-87.

⁷⁷ The following books were analysed: J. Ledr, J. Hořčíčka, *Mladý republikán* [Young Republican], Praha, Grafická unie, 1924; R. Cikhart, *Občanská nauka ve stručném přehledu* [Civic Education, a brief summary], Tábor, Nakladatelství J. Matoušek, 1925; O.J. Novotný, *Příručka občanské nauky a výchovy* [Guide for Civic Lessons and Education], Praha, Státní nakladatelství, 1923.

⁷⁸ K. Berndt, *Bürgerkunde: für die Oberstufe der Volksschulen*, Prag, Roland Verlag Morawitz, 1937.

⁷⁹ *Věstník ministerstva školství a národní osvěty*, 1919, Praha, Zemská školní rada, 1919, pp. 163-165.

History of the state of Czechoslovakia. The knowledge of the history of one's own nation, especially of those who had any importance for the cultural development of the people and who influenced the history of the Czechoslovakian state and the whole nation. The constitution and authorities of the Czechoslovakian Republic. The duties and rights of state citizens. The development of democracy and democratic social systems⁸⁰.

It is clear that instead of important events in Austria-Hungary, History teaching became about important events in Czechoslovakia. Instead of stressing the importance of the homeland it became about the importance of the nation. The role of the Empire and the monarchy were replaced by the importance of democratic forms of government and democratic processes in society. It was expected that during the presentation of History there would be attention paid so that students clearly understood the evolution of democratic thought and democratic forms of society and which historic events and groups had special meaning with regard to this; the Reformation, the revolt of the North American settlers against the English, the French Revolution, 1848, the battle of the Slavic nations for freedom, the World War and modern Socialism⁸¹. It is clear that the educational content was widened to include those historic events which led to the formation of Czechoslovakia or had any importance in its founding. In addition the earlier historic content had new emphases and was interpreted differently, as will be seen in the following analysis.

The teaching of History was for the development of national and state consciousness and the curriculum for the subject underwent many changes which were linked, besides others, to specifications for schools serving the Czech, Slovakian and German-speaking communities. It developed additionally for the definition of subjects to be taught in schools in Slovakia and sub-Carpathian-Ruthenia. More fundamental analysis of the curriculum can be found in the syllabi of elementary schools from 1930⁸². This confirmed the defined curriculum from 10th July, 1933 which was valid in the elementary schools until 1939. The curriculum for lower-secondary schools was altered by the regulation of 9th June, 1932. Generally speaking, we can see that the differences between elementary schools and lower-secondary schools were insignificant. If we examine the definition of History in the curriculum after 1930 we cannot see major changes of content, though there are more didactic differences.

Curriculum for 1930, 1932 and 1933 responded to the on-going reform of Czechoslovakian schools and accentuated the following aspects; the active nature of lessons, forms of teaching, how the students would learn, teaching methods and individualised education. This was also evident in the regulations pertaining to History teaching. «In the History lesson it is not the major target to achieve a basic understanding of events and the evolution of human society,

⁸⁰ *Ibid.*, p. 163.

⁸¹ *Ibid.*, pp. 164-165.

⁸² *Věstník ministerstva školství a národní osvěty 1930*, Praha, MŠANO, 1930, pp. 175-201.

even less the memorising of the order of rulers, names of battle-sites and dates, but the civic and moral education of pupils in a healthy spirit of democratic Republicanism»⁸³. It is clear that History and civic education came close to one another not only on a primary level (in the second to fifth year and even earlier in Natural History lessons), but also at a lower level in the sixth to eighth years of the lower-secondary schools (county schools). The curriculum had at its forefront something known as the study of cultural history defined as; the history of science, work, debate, art, technical study, ethics, the study of historic buildings as well as costumes, traditions and literature.

Examining History textbooks for elementary and lower-secondary schools for Czech-speaking and separately for German-speaking areas in the years between 1918 and 1938, we can immediately highlight differences between the content and educational targets from the period before 1918. However, the time allocated to the teaching of the subject remained the same. History books for schools using Czech as the main teaching language⁸⁴ gave intensive attention to the 'new history' from after 1879 and the period after the French Revolution. The significance of this event is interpreted very differently when compared to the textbooks from the Empire period. Whilst the Empire textbooks showed the terrifying horror of the rule of the revolutionary mob, Republican texts stressed the ideas of freedom and the founding of the French Republic. Much greater space was given in the Republican texts to the subject of national movements in the second half of the nineteenth century. Considerable emphasis was given to the Czech national movements of the nineteenth century and it was highlighted that its revolutionary dynamic was ranged against Austrian and German politics. Great importance and space was devoted to the foundation of the Czechoslovakian Republic and its struggle to achieve its existence. Pre-empting the foundation of the state, was the value placed on Czechoslovakian unity, the importance of the Czechoslovakian legion⁸⁵ during the Great War and the belief in the right to self-determination for other nations. Lauded above all, was the figure of the President, the founder or saviour, T.G. Masaryk who became a figure of study; his life, extracts from his writings, as well as his political and democratic thoughts. Masaryk was always remembered every March as the country celebrated his birthday. We can see the importance of President

⁸³ *Ibid.*, pp. 186-187.

⁸⁴ M. Gebauerová, A. Jirák, A. Reitler, *Dějepis pro školy měštanské* [History for Lower-Secondary schools], Praha, M. Gebauerová, 1922 a 1934; L. Horák, *Dějepis pro první třídu měštanských škol* [History for the First Year of the Lower-secondary School], Praha, Státní nakladatelství, 1933; L. Horák, *Dějepis pro druhou třídu měštanských škol* [History for the Second Year of the Lower-secondary School], Praha, Státní nakladatelství, 1936; L. Horák, *Dějepis pro třetí třídu měštanských škol* [History for the Third Year of the Lower-secondary School], Praha, Státní nakladatelství, 1928.

⁸⁵ In 1918 captured Czech soldiers from the Austrian-Czech army began to form their own regiment, The Czech Legionnaires which played an important part in the fighting on the Western Front – Italian and French fronts – as well as the Russian front.

Masaryk in the Czech and, perhaps more surprisingly, the German textbooks of the time.

The textbooks for German high schools⁸⁶ for higher secondary level (grammar schools) gave minimum space to themes of national struggle in the second half of the nineteenth century. Textbooks did not introduce the development of national movements nor the question of the national revival of the Czechs in the Habsburg Empire. Only in one respect were the students introduced more formally to titles of Czech Literature from the second half of the nineteenth century. In addition, the foundation of the separate state of Czechoslovakia was only briefly mentioned and was not linked to the results of political or cultural agitation in the Czech nation in the final third of the nineteenth century. The foundation of a separate state was shown to be as the result of political action by T.G. Masaryk. However, the foundation of Czechoslovakia was only given one page in the textbooks of German-speaking schools.

Textbooks for the lower-secondary level German schools⁸⁷ gave much more space to political and cultural matters and the general discussion of the position of the Czechs within the Empire. Students were much better informed on those topics and about the conflict between Czech and German-speakers at the end of the nineteenth century. This took 12 pages from a 100 page text book of the period.

If we are to summarise the analysis of History text books in the Czechoslovakian First Republic we can see major differences of content, priorities and methodology compared with textbooks from the period at the end of the nineteenth century and the beginning of the twentieth century. The key differences were the replacement of the emphasis on building Austrian patriotism and loyalty to the Emperor and his family, with a stress on valuing the foundation of a self-contained Czechoslovakian state as a result of the national endeavours of Czechs (or alternatively Slovaks) due to the changes in Europe as it moved from monarchies to a Republican model. The beginning of Czechoslovakia was characterised as a victory and revolution came as the result of a 'national battle' between Czechs and Germans in the Czech lands of the Empire. Nevertheless it was stressed that the Republic was founded on democratic principles and national and cultural equality for all nations living in the Czechoslovakian lands. This was upheld by international legislation as well as appearing in textbooks of the time. However, the textbooks were unable to look deeper at the political, cultural and social history of the people of the Czech lands regarding the nation's desires which were so strongly represented in Czechoslovakia.

⁸⁶ Analysis was made of the following texts: Montzka, Woynar; Ernst Czuczka, *Woynars Lehrbuch der Geschichte für die Oberstufe der Mittelschulen*, 2. and 3. Part, Reichenberg, Verlag Franz Kraus, 1924.

⁸⁷ Analysis of the following textbooks was undertaken by A. Rebhan, *Lehrbuch der Geschichte für die unteren Klassen der deutschen Mittelschulen in der Tschechoslowakischen Republik*, Reichenberg, Stiepel, 1923.

Conclusion

If we examine changes of structure and the content of the concepts of national education in Czech and German debate on the subject, it can be seen that the important milestones were the period of liberalised laws after 1868 and the formation of the national public societies on the Czech and German sides. Both national groups developed their own concept of a nation with cultural and linguistic organic unity. Although in the German's case the most important question was with regard to tribal education as expressed in the beliefs of L. Jahn who rejected the concept of national education based on the freedom of its citizens who wanted from their own conscious decision to politically lead and manage the state or lands of the state. In the German camp there was the feeling of them being endangered by the activities of Czech nationalists whilst the Czechs were preoccupied with protests against German dominance in the Empire.

After 1918 the situation changed. The German group were 'panicked' by the foundation of an independent Czechoslovakia and by the Czechs 'celebrating' their own state. Discussion and practices from the period before 1918 continued and it did not encourage Czechs and Germans to be open to the concept of a political nation of democratic states which would strive to achieve the best management of common land and state and also to maintain the civic education of free citizens in this democratic political entity.

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«Sudetendeutscher Wandervogel», 1920-1935

The teaching of Rights and Duties in the schools of united Italy: between ideological control, social discipline and citizenship education (1861-1900). Part One*

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ABSTRACT: Using a variety of documentary sources, the article analyses for the first time the features (syllabus, contents, times etc.) and, above all, the purposes of the teaching of *Rights and Duties of Citizens* in the aftermath of national unification (1861). This discipline was introduced in the Italian schools of different types and levels with the aim of promoting the values of citizenship and the feeling of belonging to the new state to the new generations. Actually, as the authors will prove at the end of their well-structured and original reconstruction, the teaching of *Rights and Duties of citizens* in the Italian schools during the first forty years after the unification (1861-1900) was inevitably influenced by the ideology and the political system typical of the oligarchic structure of the new State, thus reviving the deep gap between the *ideal citizenship*, the one outlined on the basis of the 'rights' and 'duties' abstractly recognized in the articles 24-32 of the *Albertine Statute*, and the *real citizenship*, expression of the overall idea of society – and of the State – that the ruling classes intended to achieve. So, it presented itself as a teaching aimed at the ethical and legal legitimization of the *system of values* supported by the bourgeois *élites* and at the acquisition of it, rather than as a tool for the education of citizens aware of their rights and duties and able to assume their civic responsibilities.

EET-TEE KEYWORDS: History of Education; School; Political Education; Civics; Cultural Identity; Italy; XIX Century.

* Anna Ascenzi wrote the first two paragraphs of this article, while the third, fourth and fifth were the result of Roberto Sani's work. The introduction and the conclusions are a joint work.

Introduction

In a contribution dedicated to *L'educazione civile nella scuola italiana* (The civil education in the Italian school), published for the first time in 1953 on «Educazione democratica» and then re-published in 1976 in the collection *Storia della didattica dalla legge Casati ad oggi*, Dina Bertoni Jovine underlined the necessity to analyze the role and characteristics of the discipline of Rights and Duties of citizens, introduced in the aftermath of national unification in primary schools and in some lower secondary education courses and presented with different contents and objectives. In particular, according to the scholar, it was necessary to focus, on the one hand, on the underlying reasons that had driven the liberal ruling class to the establishment «of a chapter called: Rights and duties of citizens, among the subjects of the primary courses», and, on the other, on the different characteristics acquired by this discipline in the Italian schools of different types and levels during the nineteenth and twentieth century:

It is interesting – Bertoni Jovine wrote – to trace the history of this chapter: it was reduced to a simple civil catechism during the more conservative periods, totally abolished in the years of triumphant reaction, then rediscovered and celebrated by the educators of positivism, deleted by spiritualists and by idealists, always hindered by clerics who consider it a dangerous substitute for Catholic catechism, so revealing the various stages of the democratic achievements, with all their defeats and successes¹.

However, looking at the research and studies on the history of education in the united Italy published in the last fifty years, we realize that Dina Bertoni Jovine's appeal to investigate the characteristics and evolution of this school discipline has been almost completely ignored². This situation is due not only to the significant delay with which the historians of education had dealt with

The second and final part of this contribution will be published in the next issue of «History of Education & Children's Literature», vol. 10, n. 2, 2015.

¹ D. Bertoni Jovine, *L'educazione civile nella scuola italiana*, «Educazione democratica», vol. I, n. 1, 1953, pp. 10-14; then re-published in Ead., *Storia della didattica dalla legge Casati ad oggi*, 2 voll., Roma, Editori Riuniti, 1976, vol. II, pp. 621-628 (the quotation above in the text is on p. 623).

² The only reliable and well-documented study referring to thenineteenth and twentieth century in Italy is the one by I. Botteri, *Una morale per il cittadino dell'Italia unita: la nascita dell'educazione civica nei dibattiti parlamentari, nei programmi e nei testi scolastici tra Otto e Novecento*, in D. Montanari (ed.), *Identità politiche e usi della storia (secoli XVIII-XIX). Casi per una riflessione critica*, «Cheiron. Materiali e strumenti di aggiornamento storiografico», vol. XXIV, n. 48, 2007, pp. 207-242, that however doesn't deal with the origin in the school curricula of the discipline and, if not marginally, with the evolution of the contents and of the educational programs of this discipline in schools of different levels. The recent article by di A. Geuna, *Educare l'uomo, il cittadino, il patriota. L'insegnamento delle «prime nozioni dei doveri dell'uomo» nell'età della Sinistra (1872-1894)*, in R. Rusconi (ed.), *Insegnare a credere. Costruzione degli Stati nazionali e insegnamento della religione nell'Europa contemporanea*, «Rivista di Storia del Cristianesimo», n. 1, 2012, pp. 161-181 is imprecise and even misleading, despite the title focused on the religious teaching in primary schools after unification.

research fields such as those relating to the history of school subjects and of the related textbooks³, but also the undeniable complexity of this field of study, whose analysis requires historical-political and social interpretive frameworks and legal and constitutional skills that only recently have become part of the cultural background of the scholars of school and education⁴.

The reconstruction of the characteristics and role played by the teaching of Rights and Duties in the schools of united Italy implies, in fact, a necessarily articulate approach with several levels of analysis. At a first level, the teaching of Rights and Duties is considered equal to the other school subjects, and, as such, investigated in its peculiar cultural and educational features: space and objectives (distribution of the study subject in the curricula of schools of different levels, number of hours, teaching staff's characteristics, methods of evaluation), content (the teaching plan), methods and tools (textbooks).

At a further level, the teaching of Rights and Duties is regarded as a study field with peculiar characteristics, in which several issues merge (the pedagogical and educational ones but also the one relating to the constitutional principles etc.), exposed to ideological and political influences, due, in this case, to the oligarchic structure of the new unitary state.

Finally, there is a third level of analysis to consider in relation to a school discipline such as Rights and Duties: we refer not only to the gap existing between what is prescribed by the teaching plan and what is actually taught during the lessons, that is a gap common to all the disciplines, but to the one – specific and typical of a study field such as that of Rights and Duties – existing between the formal recognition of the rights and the material conditions for their effective realization. This would have been a very important issue in the post-unification period, as we will see later in the work.

1. *Between Pedagogy and Politics: the Rights and Duties of citizens in the Casati's school system*

It is now appropriate to analyze the presence and specific characteristics of this discipline in the curricula of schools of different levels. In this regard, according to the Casati Law and subsequent legislation, the teaching of Rights

³ See P. Bianchini, *Per una storia culturale e quantitativa delle discipline scolastiche*, in Id. (ed.), *Le origini delle materie. Discipline, programmi e manuali scolastici in Italia*, Torino, Società Editrice Internazionale, 2010, pp. 3-11; and 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 España: balance y perspectivas*, Macerata, eum, 2013, pp. 119-138.

⁴ See R. Sani, *Nuove tendenze della ricerca storico-educativa*, in S.S. Macchietti, G. Serafini (edd.), *La ricerca sull'educazione tra pedagogia e storia*, Lecce, Pensa Multimedia, 2008, pp. 67-75.

and Duties was introduced only in the curricula of primary school and technical and normal lower secondary schools. However, for the primary courses the teaching was not originally compulsory. In fact, the Article 315 of the Law 13 November 1859, n. 3725 stated that:

primary education is divided into two levels, upper and lower. The lower level includes: religious teaching, reading, writing, elementary arithmetic, Italian, basic knowledge of metric system. Upper education includes not only the subjects of the lower grade: the rules of composition, calligraphy, bookkeeping, elementary geography, exposure of the most remarkable facts of national history, the knowledge of the physical and natural sciences usable in everyday life. In male schools also elementary geometry and linear design were added to the above mentioned subjects, while in female schools the teaching of domestic works⁵.

The dispositions related to the *Programmi per la scuola elementare annessi al Regolamento 15 settembre 1860* integrated the study program established by the Casati Law, introducing, in the following months, the teaching of «Duties of the Man and the Citizen» among the compulsory teachings of the third and fourth class⁶. This teaching, as underlined by the Ministry of Education inspector Angelo Fava in *Istruzione ai Maestri delle Scuole primarie sul modo di svolgere i Programmi approvati col R. Decreto 15 settembre 1860* (Instructions for the Teachers of primary schools on how to carry out the programs approved with Royal Decree 15 September 1860), should provide the children of the upper primary school with a general knowledge of «men's duties towards God, family and society», and the citizen's ones «towards the State government and the other citizens»⁷.

For what concerns the normal school, the art. 358 of the Law 13 November 1859 n. 3725, added the teaching of «General notions on the rights and duties of citizens in relation to the Statute, the electoral law and public administration»⁸

⁵ Art. 315 of the Law 13 November 1859, n. 3725 – *Sul riordinamento della Pubblica Istruzione (Casati Law)*, in *Raccolta dei regi editti, manifesti ed altre provvidenze de' magistrati ed uffizi*, Torino, Speirani, 1859, vol. 28, parte seconda, p. 88.

⁶ *Programmi per la scuola elementare annessi al Regolamento 15 settembre 1860*, in *Codice dell'istruzione secondaria, classica e tecnica e della primaria e normale. Raccolta delle Leggi, Regolamenti, Istruzioni ed altri provvedimenti emanati in base alla legge 13 novembre 1859*, Torino, Tipografia Scolastica di Sebastiano Franco e figli e comp., 1861, pp. 401-405.

⁷ *Istruzione ai Maestri delle Scuole primarie sul modo di svolgere i Programmi approvati col R. Decreto 15 settembre 1860*, in *Codice dell'istruzione secondaria, classica e tecnica e della primaria e normale. Raccolta delle Leggi, Regolamenti, Istruzioni ed altri provvedimenti emanati in base alla legge 13 novembre 1859*, cit., pp. 415-417.

⁸ «The subjects taught in these institutions [normal schools] are: 1. The Italian language and elements of national literature; 2. elements of general geography; 3. national geography and history; 4. arithmetic and accounting; 5. elements of geometry; 6. basic knowledge of natural history, physics and chemistry; 7. elementary rules of hygiene; 8. linear design and calligraphy; 9. pedagogy. In normal schools for female teachers there was also the teaching of domestic works; while, in those for male teachers, an elementary course of agriculture and general notions on the rights and duties of citizens in relation to the Statute, the electoral law and public administration»

in male schools⁹, in order not only to adequately prepare the future primary school teachers to teach this discipline to their pupils, but also to give them the possibility to perform in their everyday life their fundamental role of civil and «political educators» of popular classes, through their words and their example:

If, then, the teachers [of normal male schools], who teaches Duties and Rights in normal or teachers' Schools, recognizes the importance of a such a job, he will feel the wisdom and effectiveness of his words as a source of beneficial culture and virtue for a great part of people who will not receive other political education¹⁰.

Actually, in the educational programs for normal school approved by the R.D. 9 November 1861, the first to be issued after the national unification, this teaching was assimilated to that of «Religion and Morality»¹¹. Only later, with the introduction of the new teaching plans in 1867, it acquired a specific autonomy and a name – «Rights and Duties of citizens» – that was very similar to that established by Casati law¹². Then it changed name and characteristics again, with the introduction of new teaching plans for the normal school issued in 1890 («Morality and rights and duties of the citizens»)¹³, and in 1892 («Pedagogy and Morality»)¹⁴ and in 1895 («Morality»)¹⁵.

(Art. 358 of the Law 13 November, 1859, n. 3725 - *Sul riordinamento della Pubblica Istruzione* (Casati Law), cit., p. 93).

⁹ The introduction of the «General notions on the rights and duties of citizens in relation to the Statute, the electoral law and public administration» exclusively in the curriculum of the normal male schools, and not in that of female schools, can be explained, on the one hand, by the fact that the teachers were not qualified to teach in upper elementary school, i.e. in the third and fourth grade of primary school, in which there was the teaching of Man's and Citizen's Duties; on the other hand, by the fact that, according to the Law 17 March 1861, n. 4671 (and then the following Law 20 March 1865, n. 2248), women were excluded from the vote, so as the illiterate, those who are debarred and condemned to idleness, vagrancy and begging.

¹⁰ *Istruzioni e programmi per l'insegnamento sui Diritti e i Doveri del cittadino nelle scuole normali e magistrali*, in R. D. 10 October 1867, n. 1942 – *Istruzioni e programmi per l'insegnamento nelle scuole normali e magistrali in Collezione celerifera delle leggi, decreti, istruzioni e circolari pubblicate nell'anno 1867 ed altre anteriori*, Torino, Tipografia Editrice di Enrico Dalmazzo, 1867, p. 611.

¹¹ R.D. 9 November 1861, n. 315 – *Programmi e regolamento per le scuole normali e magistrali*, «Gazzetta Ufficiale del Regno d'Italia», 4 dicembre 1861, n. 294, p. 376.

¹² *Istruzioni e programmi per l'insegnamento sui Diritti e i Doveri del cittadino nelle scuole normali e magistrali*, R.D. 10 October 1867, n. 1942 – *Istruzioni e programmi per l'insegnamento nelle scuole normali e magistrali*, in *Collezione celerifera delle leggi, decreti, istruzioni e circolari pubblicate nell'anno 1867 ed altre anteriori*, cit.

¹³ R.D. 17 September 1890, n. 7143 – *Istruzioni e programmi per le scuole normali*, «Gazzetta Ufficiale del Regno d'Italia», 20 ottobre 1890, n. 246, p. 4214.

¹⁴ R.D. 11 September 1892, n. 689 – *Programmi per le scuole normali*, «Gazzetta Ufficiale del Regno d'Italia», 14 dicembre 1892, n. 291, p. 4678.

¹⁵ R.D. 24 November 1895, n. 704 – *Istruzioni e programmi per i corsi complementari e per le scuole normali*, in «Gazzetta Ufficiale del Regno d'Italia», 24 December 1895, n. 302, p. 6806.

As already mentioned, also in technical schools there was the teaching of Rights and Duties, but there isn't in the two-year school preceding the Liceo and, more generally, in the classical secondary school (grammar school). It is necessary to provide some essential details to understand the reasons for such a situation. The presence or the absence of the teaching of Rights and Duties in the different lower secondary schools and its different characteristics in the schools in which it was present (content and purposes, teaching method, number of hours), responded not only to pedagogical and didactic reasons, but also to ideological and political ones. In this regard, it seems that the different characterization of the discipline was due to a differentiating logic, adapting content, programs and objectives to the different characteristics of each type of school, or, rather, to the origin and social destiny of the respective pupils.

The education and cultural process of the grammar school was reserved almost exclusively to the sons of the aristocratic and bourgeois elites, and was aimed to provide the future leaders of the country with a solid cultural background and a significant ethical, civil and political conscience, based, rather than on a practical course of Rights and Duties, on all of the teachings that were the curriculum of the grammar school. In other words, as the educational programs for grammar schools -issued with RD 10 October 1867, n. 1942- established, disciplines such as literature, philosophy or history had the task of «educating the moral and civil conscience [...] of our youth»¹⁶.

The educative needs that, from a purely ethical, civil and political point of view, characterized the petty bourgeoisie and the new urban middle-class youth, which represented the majority of the students of technical schools, were very different. This generation, unlike their peers from the lower classes of the population, had for the first time access to secondary school and, by virtue of the technical-specialist education received there, they were prepared to enter the world of work to occupy positions of greater responsibility and importance than those traditionally reserved to the working classes. Therefore, they needed an «adequate political education», capable to inspire their «feelings of honesty and love for their family, their fellows, their work, their homeland, and respect for its laws», i.e. to render them «honest citizens», thus promoting the «civilization progress» and the «true national prosperity»¹⁷; also because, given their social background, they probably had not developed, within their families, a civil and political awareness¹⁸.

¹⁶ *Istruzioni e programmi per l'insegnamento della geografia e della storia nei ginnasi e licei*, in R.D. 10 October 1867, n. 1942 – *Istruzioni e programmi per l'insegnamento nei ginnasi e licei*, in *Collezione celerifera delle leggi, decreti, istruzioni e circolari pubblicate nell'anno 1867 ed altre anteriori*, cit., p. 614.

¹⁷ *Istruzioni e programmi per l'insegnamento della Geografia e della Storia, nelle scuole tecniche*, in R.D. 10 October 1867, n. 1942 – *Istruzioni e programmi per l'insegnamento nelle scuole tecniche*, in *Collezione celerifera delle leggi, decreti, istruzioni e circolari pubblicate nell'anno 1867 ed altre anteriori*, cit., pp. 602-603.

¹⁸ See 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. 7, n. 2, 2012, pp. 79-96. The need to promote, through the technical and normal school, «an adequate political education» for the youth of the middle class was strongly felt also in the following

But to better clarify the unique role that the ruling classes gave to the teaching of Rights and Duties, particularly in secondary technical and normal schools, it is necessary to broaden the discussion and refer to the ideological orientation inspiring the moderate elites on the relationship between rulers and ruled people, between elites and lower classes. In this sense, it is worth remembering the great importance of the thought developed within what at the time was undoubtedly the most well-structured and influential intellectual and philosophical-literary circle of united Italy, i.e. the neo-Hegelian school of Naples, led by Francesco De Sanctis, the brothers Silvio and Bertrando Spaventa and by Angelo Camillo De Meis¹⁹.

De Meis²⁰ himself, in a famous essay published in 1868 with the title *Il sovrano*²¹, also referring to *Saggio storico sulla rivoluzione napoletana del*

decades, especially with a view to the implementation of the electoral reform realized with the laws 22 January 1882, n. 593, and 7 May 1882, n. 752, which significantly expanded the number of voters, who went from 621,896 to 2,017,829, i.e. from 2.2% to 6.9% of the population, including for the first time elementary school teachers and other categories of workers who, until then, had been excluded for reasons of wealth from political participation. See L. Ballini, *Le elezioni nella storia d'Italia dall'Unità al fascismo*, Bologna, Il Mulino, 1988, pp. 76-84.

¹⁹ On the neo-Hegelian school of Naples see in particular: L. Russo, *Francesco De Sanctis e la cultura napoletana (1860-1885)*, Bari, Laterza, 1943; G. Oldrini, *Gli hegeliani di Napoli. Augusto Verra e la corrente ortodossa*, Milano, Feltrinelli, 1964; S. Landucci, *L'hegelismo in Italia nell'età del Risorgimento*, «Studi Storici», vol. VI, 1965, pp. 597-625; G. Oldrini, *Il primo hegelismo italiano*, Firenze, Vallecchi, 1969; Id., *La cultura filosofica napoletana dell'Ottocento*, Roma-Bari, Laterza, 1973; Id., *L'hegelismo italiano tra Napoli e Torino*, «Filosofia», vol. 7, 1982, pp. 247-270; Id., *L'idealismo italiano tra Napoli e l'Europa*, Milano, Guerini, 1998. About the events in the unification period, also the work Istituto Italiano per gli Studi Filosofici (ed.), *Gli hegeliani di Napoli e la costruzione dello Stato unitario. Atti del Convegno: Napoli, 6-7 febbraio 1987*, Roma, Libreria dello Stato, 1989 is very interesting.

²⁰ On Angelo Camillo De Meis's biography and work, along with the work by F. Tessitore, F. Di Trocchio and V. Cappelletti in the *Dizionario Biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, 1990, vol. 38, pp. 620-634, see: B. Croce, *Angelo Camillo De Meis*, «La Critica», n. V, 1907, pp. 348-351; G. Gentile, *La filosofia in Italia dopo il 1850*, «La Critica», n. XII, 1914, pp. 286-310; A. Del Vecchio Veneziani, *La vita e l'opera di Angelo Camillo De Meis*, Bologna, Zanichelli, 1921; S. Valitutti, *Angelo Camillo De Meis pensatore politico*, in Istituto Luigi Sturzo (ed.), *Scritti di sociologia e politica in onore di Luigi Sturzo*, 3 voll., Bologna, Zanichelli, 1953, vol. III, pp. 467-485; G. Negrelli, *Storicismo e moderatismo nel pensiero politico di Angelo Camillo De Meis*, Milano, Giuffrè, 1968; and, the new and important: G. Sorgi, *Angelo Camillo De Meis. Dal naturalismo dinamico alla teoria del sovrano*, Napoli, Edizioni Scientifiche Napoletane, 2003. On the pedagogical and scholastic impact of the «theory of the two peoples» and, more generally, of De Meis's ideas and of those of the Hegelians of Naples, see: G. Chiosso, *L'educazione tra solidarietà nazionale e nuova cittadinanza: profilo storico*, in *L'educazione tra solidarietà nazionale e nuova cittadinanza*, Brescia, La Scuola, 1993, pp. 14-24. But see also Id., *Nazionalità ed educazione degli Italiani nel secondo Ottocento*, «Pedagogia e Vita», vol. 48, n. 4, 1987, pp. 421-440.

²¹ The article by A.C. De Meis *Il Sovrano. Saggio di filosofia politica con riferimento all'Italia*, edited for the first time in «Rivista bolognese. Periodico mensile di scienza e letteratura» in January 1868, was later re-published along with other works by De Meis, G. Carducci, F. Fiorentino, G.B. Talotti etc. in B. Croce (ed.), *Il Sovrano. Saggio di filosofia politica con riferimento all'Italia (1868)*, Bari, Laterza, 1927, pp. 7-21, from which we quote. The edition by Benedetto Croce includes also,

1799 by Vincenzo Cuoco²², argued that «the democratic state is a historical impossibility», since «society is divided into two different peoples», i.e. common people «closer to animality than to humanity» and a very limited minority of educated men.

Democracy – the scholar said – arose in the ancient time when the Latin-Greek civilization reached its maturity. Democracy will rise again in the modern time when [...] the thought, that is now the abstraction of few people, will become the habit and feeling of all, a general language: when the two peoples will have a common basis, and they will be a single modern and civil people. [...] In Italy the two peoples are deeply separated; perhaps more than elsewhere. [...] Therefore, there is not a possible, true and perfect Sovereignty, but only the Tyranny. [...] The Tyranny of the people who think, on the people who do not think in any way²³.

De Meis recognized, however, that between the upper class («the people who think») and the «womb-people» or the «animal-like» class, there was a «middle class», which filled the gap between the two extremes («two qualitatively different peoples, one passionate, natural, ancient; the other thoughtful and intellectual»). He stressed, indeed, that this «middle class», made up of the «lower stratum of the philosophical and truly modern people» (aristocratic and bourgeois elites) and the «upper stratum of the natural, semi-ancient people, that could be also defined (in the philosophical sense) animal» (the popular classes)²⁴, had the task of providing an additional and essential legitimacy to the bourgeois revolution («in order to let the Kingdom of reasonable freedom last, resisting to the impact of a superstitious and illiberal past») and to broaden the consensus for the unitary state²⁵.

on pp. 52-90, a second article by A.C. De Meis, entitled *Il Sovrano. Secondo articolo*, published also in «Rivista bolognese. Periodico mensile di scienza e letteratura» in March 1868 (pp. 180-208), written in response to some comments and criticisms on De Meis's first article by G.B. Talotti.

²² See V. Cuoco, *Saggio storico sulla rivoluzione napoletana del 1799*, edited by F. Nicolini, Bari, Laterza, 1913.

²³ De Meis, *Il Sovrano. Saggio di filosofia politica con riferenza all'Italia*, cit., pp. 12-14.

²⁴ *Ibid.*, pp. 52-54.

²⁵ In the numerous post-unification re-publications of the famous and successful Luigi Alessandro Parravicini's work *Giannetto* (Como, Ostinelli, 1837), one of the first texts used for the teaching of the «Rights of Man and Citizen in connection with the fundamental Statute of the Kingdom» to children of elementary schools, there is a significant division of the different orders or classes that made up the social structure: «The princes, the bishops, the Counts, the Marquises, the nobles, the richest landowners and merchants, the most important public officials, the wiser and more virtuous men form the *first order of the Society*. The mass of small landowners, merchants, lawyers, engineers, artists, doctors, surgeons and manufacturers form the *middle order*. The shopkeepers, artisans, servants, delivery boys, coachmen, porters, laborers, retailers and the other common people form the *third order*». All of them, Parravicini wrote, «must respect and obey the laws; everyone must respond to the needs of the State paying the taxes and arming himself to defend it when the law requires» (*Giannetto. Opera di L.A. Parravicini. Edizione 57.ma originale italiana stereotipa aumentata dall'Autore...*, Milano, V. Maisner e C., 1874, vol. I, p. 134).

However, in order to reach this task, it was necessary that this «middle class», which aspired to acquire an increasingly important role in the economic and social life of the country, was educated to identify itself with the values of the liberal state and to follow the constitutional principles established by the Statute: «It is necessary – De Meis concluded – that the middle class is favourable to the progress of ideas, passionate with independence, unity and greatness of the Country and ready to shed his blood for it»²⁶.

Essentially, the «civil and political education» that the young people of the upper classes received in the secondary classic school (grammar school), as well as in the cultured and refined family environment, could be acquired also by the new «middle class» generation in the technical and normal schools, through the practical teaching of Rights and Duties, in order to provide them with the ideological schemes and patterns of behaviour functional to the specific needs of their class²⁷.

Therefore, the presence or absence in the schools of different levels of the teaching of *Rights and Duties*, and its characteristics and objectives, were directly dependent on the origin and social destiny of the pupils. So, in the primary school it was exclusively focused on the *Duties*, with a predominant purpose of ideological control of the popular classes, while in the technical and normal lower secondary school, it responded to the purpose of providing the young people of the middle class and petty bourgeoisie – i.e. those who for the first time were required to perform a role of responsibility in the economic and social life of the new State – with a civil and political education sufficient to render them «real citizens», capable to «perform their duties» and «to exercise their rights, with an equal conscience», in order to ensure «the progress and welfare of all the people» and to allow «the well being of the State and of the whole Society»²⁸.

²⁶ De Meis, *Il Sovrano. Saggio di filosofia politica con riferenza all'Italia*, cit., pp. 20 and 67.

²⁷ See Ministero di Agricoltura, Industria e Commercio, *L'istruzione tecnica in Italia. Studi di Emilio Morpurgo Segretario generale presentati a S.E. il Ministro Finali*, Roma, Barbèra, 1875, pp. 25 and 71.

²⁸ See, for example, *Istruzioni e programmi per l'insegnamento sui Diritti e i Doveri del cittadino nelle scuole tecniche*, in R.D. 10 October 1867, n. 1942 – *Istruzioni e programmi per l'insegnamento nelle scuole tecniche*, cit., p. 611. But also see the references in *Istruzioni e programmi per l'insegnamento sui Diritti e i Doveri del cittadino nelle scuole normali e magistrali*, in R.D. 10 October 1867, n. 1942 – *Istruzioni e programmi per l'insegnamento nelle scuole normali e magistrali*, *ivi*.

2. To educate the «industrious gentleman»: the teaching of Rights and Duties of citizens in primary schools

As already mentioned, the teaching of «Duties of the Man and Citizen» was not originally planned in the curriculum for primary schools established by Casati law, but it was introduced only later, with the issuing of the *Programmi per la scuola elementare annessi al Regolamento 15 settembre 1860*. As regards the content and purposes of such a teaching, the indications contained in the Programs only remember that in the third class the teacher should provide pupils only with a «short presentation of men's duties», while in the fourth class he could illustrate with greater details the «duties of the man and citizen, above all in connection with the fundamental Statute of the Kingdom»²⁹.

The information provided by the Programs were integrated with the above mentioned *Istruzione ai Maestri delle Scuole primarie sul modo di svolgere i Programmi approvati col R. Decreto 15 settembre 1860* that indicated the main objectives that should characterize the discipline and that were written by the central inspector Angelo Fava. The instructions stressed, above all, that «in those municipalities where the education process ends with the second class, the teacher, having to explain that men have duties towards their family and society, could use the occasion of religious instruction, and those chapters of books relating to moral subjects, in order to show the children their duties towards God, their parents, brothers and to the homeland».

The «short presentation of men's duties» established by the Programs for the third class should have been, according to Angelo Fava, a dissertation focused on a limited number of topics considered fundamental for various reasons: «In the society – he wrote – the man has duties towards the State Government and the other citizens. He has to respect and obey the first. Obedience requires that you respect the laws, you willingly serve the Government for the good of society, and that you contribute to the maintenance of public order and the common good. Respect wants the citizens to avoid any act of contempt and disobedience to the established authorities, not for fear of punishment, but for compliance with those principles of public interest that they represent and protect».

The main teacher's aim, as Angelo Fava underlined, was to focus «particularly on the duties of justice and, above all, of respect of the other people's property and rights» and draw the students' attention on the «duty that embraces all the social ones, that is the obligation to love and serve the country, the civil society to which we are united by virtue of the origin and the language, the common laws and interests, the memories and the hopes». He had to try to inspire in each of them a strong «civic consciousness» and a «love for the country» leading not

²⁹ *Programmi per la scuola elementare annessi al Regolamento 15 settembre 1860*, cit., pp. 401-405.

simply to «empty ambitions», but more properly to the «constant respect of moral and civil laws» and to «acts of active virtue and self-sacrifice».

In the fourth and last class of the primary education, the Programs recommended to analyze the «duties of men and the duties of citizens in relation with the fundamental Statute of the Kingdom». In relation to this, Angelo Fava underlined that the teacher should have to always keep in mind the age and the abilities of his students, carefully avoiding too artificial and complex explanations and subjects: «In primary schools – he stated – we don't want to teach ethics, nor the constitutional right, nor the history of Italy, [...] but give only their most basic knowledge, that children are capable to understand, and which could be very helpful for them whether they decide to continue the studies or to leave the school».

Given this clarification, after pointing out that «many concepts about the duties of man had already been explained in the second and third class», Angelo Fava suggested to the «teachers of the fourth class» to devote their efforts primarily to «clarify the knowledge already acquired on these issues», adding to the already learnt elements «others that the young men couldn't have learnt in the previous years» in relation to the duties of citizens and the principles established in the «fundamental Statute of the Kingdom»³⁰.

The teaching of Duties of Men and Citizens, as we have seen, was limited to two classes – the third and fourth – of the upper primary education, and was addressed to the small group of students destined to complete the primary education and continue their studies³¹. In this respect, it was far from providing an essential ethical-civil and political education to the rural people and to the poorest and marginalized populations in the urban centres, i.e. that part of the country, a large majority, which still seemed to be far away from the values and institutions of the liberal state and completely devoid of a culture of citizenship.

Not surprisingly, the need to rethink the teaching objectives and characteristics of the teaching of Duties of Men and Citizens in primary schools arose very early in the liberal ruling class. On this side, indeed, we can affirm that this discussion developed along with the one on the introduction of compulsory education. These two issues – the one on the measures to oppose truancy and illiteracy and the one relating the civil and political education of the working classes – were of a central importance, especially from the early seventies³².

³⁰ *Istruzione ai Maestri delle Scuole primarie sul modo di svolgere i Programmi approvati col R. Decreto 15 settembre 1860*, cit., pp. 415-417.

³¹ In 1881, on the total number of 100 students enrolled in first class, 52 were in the second class and 38 in the third class, while only 17 completed the compulsory education process. After forty years from national unification, in 1901, on 100 students enrolled in first class, 60 were in the second and 42 in the third, while only 18 completed the compulsory education (E. De Fort, *Storia della scuola elementare in Italia. I. Dall'Unità all'età giolittiana*, Milano, Feltrinelli, 1979, p. 163).

³² See also A. Gabelli's acute reflections, *L'istruzione elementare in Italia secondo gli ultimi documenti pubblicati dal Ministero*, «Nuova Antologia», vol. 5, n. 13, 1870, pp. 198-199.

During the long and complex parliamentary process that led to the approval of the law 15 July 1877 on compulsory education, in fact, the need to introduce in compulsory education a specific ethical-civil teaching was stressed – Basic elements of the duties of men and citizens – aimed at promoting, in the students of lower primary school, an essential knowledge of the principles that inspired the idea of citizenship and the civil and national sense³³.

This was a very exemplary necessity, which filled a real gap in primary education, the only one which the popular masses could actually access. In this sense, the Coppino Law, issued in July 1877, after establishing the obligation for all children «aged six» to attend the «lower primary education, which generally lasts up they are aged nine», introduced the teaching of «Basic elements of the duties of men and citizens» in this three-year course³⁴.

Actually, this discipline was really activated in the curriculum of primary school only a decade later, under the R.D. 25 September, 1888, n. 5724, by which the Minister of Education Paolo Boselli promulgated the new teaching plans for the primary school.

In the General Instructions attached to the programs, Aristide Gabelli remembered, in this regard, that «in the law of 15 July 1877, the elements of duties of men and citizens» were included in the school subjects, whose teaching had to «find a solution to a problem of the school, which was accused of not being educational». He, then, determined the «nature and the boundaries» of this discipline: «It is not only a matter of learning the duties – concluded Gabelli – but to get used to fulfil them».

In this regard, as stated in the Special Instructions related to the discipline, it was necessary that the Basic elements of the duties of men and citizens, far from being abstract and useless theoretical dissertations addressed «to the children, who have no idea of the social and political life», were intended to «make the pupils acquire the habit of exactly fulfil the duties typical of their own age and condition»; and again: «For what concerns the citizens' duties, it is useful that the pupils understand the benefits they could receive from the civil society and the institutions of our country, [...] and acquire the sincere sense of duty to contribute to its conservation and its improvement not only with their words but, when necessary, with patriotic self-sacrifice».

³³ Along with the broad and well-documented research by Botteri, *Una morale per il cittadino nell'Italia unita: la nascita dell'educazione civica nei dibattiti parlamentari, nei programmi e nei testi scolastici tra Otto e Novecento*, cit., pp. 207-242; see also: 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; and Ead., *Metamorfosi della cittadinanza. Studi e ricerche su insegnamento della storia, educazione civile e identità nazionale in Italia tra Otto e Novecento*, Macerata, eum, 2009.

³⁴ Artt. 1-2 of the Law 15 July 1877, n. 3961 – *Sull'obbligo dell'istruzione elementare*, in *Raccolta Ufficiale delle Leggi e dei Decreti del Regno d'Italia*, Roma, Stamperia Reale, 1877, vol. 51, p. 4549.

Essentially, the Basic elements of the duties of men and citizens had to contribute to the promotion of a strong moral and civil conscience and of a strong sense of national identity among the younger generation. Not surprisingly, in the explanation of the real programs of the discipline, the R.D. 25 September 1888, n. 5724, stated:

The teacher will use all the occasions to remind his students their duties toward God, their fellows and themselves, trying to inspire in them the respect for justice and for the dispositions of mind, which are the most precious heritage of civilization and that contribute to a more orderly, peaceful and progressive social coexistence. There is not, we can say, a teaching that it is not susceptible to this objective. In particular, he will avail himself of geography and history, to make clear how many sacrifices the constitution of Italy required, and how the Italians cannot hope for safety if not from maintaining its unity³⁵.

The climate of political and cultural decline that characterized the last fifteen years of the nineteenth century³⁶ and the prevalence, also on the side of school policy, of the nationalistic aspirations expressed by Francesco Crispi and shared by the Minister of Education Guido Baccelli, led to the enactment, with R.D. 29 November 1894, n. 525³⁷, of the new teaching plans for the primary school, just six years after the previous ones.

The programs of 1894 were organized according to the subjects and, while maintaining the General Instructions written for those of 1888 by Aristide Gabelli («a model of pedagogical wisdom»), marked a real turning point, both in terms of a reduction and simplification of the contents, and of the ideological and cultural objectives³⁸.

³⁵ R.D. 25 September 1888, n. 5724 – *Riforma dei programmi delle scuole elementari*, «Bollettino Ufficiale del Ministero della Pubblica Istruzione», parte prima, 1888, pp. 492-515. On these programs, which took their name from the educator and man of school Aristide Gabelli, which prepared the famous *Istruzioni generali*, see: F.V. Lombardi, *I programmi per la scuola elementare dal 1860 al 1985*, Brescia, La Scuola, 1987, pp. 67-97; E. Catarsi, *Storia dei programmi della scuola elementare (1860-1985)*, Scandicci (Firenze), La Nuova Italia, 1990, pp. 205-219.

³⁶ On the political decline and the reactionary ideological and cultural motions which marked the Italian society in the last fifteen years of the nineteenth century, see in particular: U. Levra, *Il colpo di stato della borghesia. La crisi politica di fine secolo in Italia 1896-1900*, Milano, Feltrinelli, 1975; F. Gaeta, *La crisi di fine secolo e l'età giolittiana*, Torino, Utet, 1982; Istituto per la Storia del Risorgimento Italiano, *Problemi istituzionali e riforme nell'età crispina. Atti del 55° Congresso nazionale (Sorrento, 6-9 dicembre 1990)*, Roma, Istituto per la Storia del Risorgimento Italiano, 1990; U. Levra, *Fare gli italiani. Memoria e celebrazione del Risorgimento*, Torino, Comitato di Torino per la storia del Risorgimento italiano, 1992; C. Duggan, *Creare la nazione. Vita di Francesco Crispi*, Roma-Bari, Laterza, 2000.

³⁷ R.D. 29 November 1894, n. 525 – *Riforma dei programmi per le scuole elementari*, «Bollettino Ufficiale del Ministero della Pubblica Istruzione», 1894, pp. 1888-1916.

³⁸ See G. Chiosso, *Nazionalità ed educazione degli Italiani nel secondo Ottocento*, «Pedagogia e Vita», vol. 48, n. 4, 1987, pp. 421-440; and Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale. L'insegnamento della storia nelle scuole italiane dell'Ottocento*, cit., pp. 104-116.

In the *Relazione a S.M. il Re* (Report to Your Majesty, the King), a premise to the text of the new teaching organizations, the Minister Baccelli explained the basic guidelines that inspired this measure: «I thought it was necessary – he wrote – to reduce the subjects and the exams to a minimum of useful knowledge and abilities, that every child should gradually acquire from primary school». Such a choice, according to him, was due to the fact that the students once finished «the primary school were unprepared for a higher education» and, more importantly, «poorly prepared for the duties they had to perform in the future for their civilization and their country».

The programs introduced in 1888 by the Minister Boselli were primarily blamed for this situation. In this programs «the specific nature of the school was lost, due to the excessive desire to strengthen and give importance to it, and the number and the extension of the study subjects and of the homework to do to acquire the culture and the abilities required by the Legislator excessively increased, due to the anxiety not to lose the several purposes of the school, above all that to prepare children for the middle school». The teachers themselves, «due to the overload of premature or excessive teachings», were inevitably diverted from their main task that, according to Baccelli, should have been the «mission of educating»³⁹.

In this regard, he pointed out how the new educational programs represent the first and fundamental step in a more comprehensive reform process intended to deeply modify the nature and purposes of primary school⁴⁰, giving to it «its own form and character», and considering it «not only as a sort of “vestibule” to classical, technical and professional studies» but as a «gym to prepare to the civil life (so it is possible that it could be useful also for the few destined to continue the knowledge process)».

The minister Baccelli attributed to the primary school, considered essentially as a «school of the people» and defined «within the natural boundaries determined by the reasons of its nature and [...] by the national utility», the task of being «an instrument of moral and civil redemption» of the Country,

³⁹ G. Baccelli, *Relazione a S.M. il Re*, in R.D. 29 November 1894, n. 525 – *Riforma dei programmi per le scuole elementari*, cit., pp. 1888-1890.

⁴⁰ Baccelli had been supporting these guidelines since his previous experience as a leader of the Minerva, from January 1881 to March 1884, in governments Cairoli III and Depretis IV and V. In this regard, in the report attached to the bill on the «Establishment of the popular school in addition to compulsory education», presented to the House of Deputies on 17 November 1881, the Minister of Education thus justifies his propose of reorganization of the popular school: «we complain the poor educational virtue of the school, the lack of health and strength of our youth, the weak sense of discipline and patriotism, the subversive theories and a spirit of impatience always ready to revolt, which replaces a feeling of devotion to the king and respect to the institutions [...]. We believe it is necessary to develop the intellectual and moral forces of the individuals, stimulate the personal initiative and hard work [...]. Why, if our youth is in danger of being misled by the sect, don't we hurry to prevent their destructive work?» (in Camera dei Deputati, *Atti parlamentari, Documenti*, Leg. XIV, sess. 1881-82, Vol. III, n. 240).

providing the new generations with a few basic teachings, useful to be integrated successfully into the world of work and in the civil and political community: «Reading, writing, keep accounts and become an industrious gentleman was and still is the program of the Italian good sense; return to it, means [...] a rapid and infallible progress»⁴¹.

The purpose summed up in the formula «instruct the people just enough, educate them the more you can», drew inspiration not only from didactic and pedagogical issues, but also, and especially, from fundamentally political reasons. The need to define people's education within clearly defined boundaries and to determine its characteristics and extension according to the practical needs of the lower classes and to the specific needs of the productive life and the labour market in urban and rural areas, was associated, in fact, also with the prospect of making primary school a place and a means for a national and civil education, essentially aimed at strengthening the social cohesion and the full identification of the populations with the organizations and the institutions of the liberal state, through a complex process of homogenization and nationalization of the Italians. It was necessary to promote, through «primary school, generations morally renewed, for which the respect of the laws is strong and invincible [...] and the love of the country will turn into daily acts of honesty, work and sacrifice».

Starting from the above mentioned considerations, we can easily understand the particular attention paid to the teaching now renamed Rights and Duties of Citizens in the educational programs of 1894, as well as to the changes to the contents and purposes of the discipline, compared to those established in 1888. The teaching of Rights and duties of Citizens merged with those of Italian history and Geography, and, as the Special Instructions stated, it had to give to «the whole education process the characteristics best responding to the needs and aspirations of the Italian nation». It had also to contribute to promote «the knowledge and love for the homeland, become free and great thanks to the thinkers and martyrs who redeem it from its long slavery», and «the awareness and [...] the appreciation for their peculiar Italian character» in the new generations.

In this sense, the fact that the discipline merged with Italian history and Geography was not purely formal. It responded to a specific educational goal, whose scope and characteristics went beyond the simple knowledge acquired by the contribution of the various subjects: «It is important not to forget – we can read in the Special instructions – that the three grouped disciplines must form a single one, in the method, applications and effects, it is necessary to consider that their coordination is essential to give the first form, and also the most durable, of civil education».

⁴¹ Baccelli, *Relazione a S.M. il Re*, cit., pp. 1888-1889.

With reference to the specific contents that should characterize the teaching of Rights and Duties of Citizens and their distribution in the different classes of the primary course, the programs of 1894 were much more analytical and precise than the previous ones:

The rights and duties of citizens, taken from the Statute of the Kingdom, will be mentioned since the third class, with attention and discretion so that students are not forced to believe what is beyond their understanding and is too different from the idea of duties proper to their age and condition. [...] In the fifth class those articles of the Statute that determine positively the rights and duties of citizens can be explained more extensively, and can be illustrated through the explanation of the functions of the State great powers and the particular attributes of the public administrations. So it is not difficult to understand the difference between the moral and the written law, and to notice how the first requires, in the secret of each consciousness, the fulfilment of the duties, leaving the responsibility of the acts before God, himself and the other men; while the other establish for all the members of the society, and under certain penalties, a number of inviolable requirements, that ensure peace and order in civil society.

And also, with specific regard to the manner of presenting the different articles of the Statute of the Kingdom to the students:

Exposing the fundamental law of the state it is necessary to underline the principle that voting is a right, but it is also morally compulsory; it should be free, conscientious, disinterested, aimed only to the general good of the Country. With regard to the taxes, it's important not forget to persuade that any fraud, in order to escape this obligation, is an equal or even more serious, fault than to harm the individuals in their property. Always keep in mind not to separate the idea of the right from corresponding one of duty. So, for example, the right of individual freedom and inviolable domicile must be associated with the respect for the other people and their possessions; the principle of freedom of conscience with the duty not to offend in any way the opinions and faith of another citizen; the right to work and that of association for an honest purpose with the obligation not to prevent anybody in the exercise of his activities. Therefore, the primary school educates morally renewed generations, for which the compliance with the law is strong and invincible as the feeling of freedom, and love will turn to daily acts of honesty, work, sacrifice⁴².

Passing from the examination of the educational programs and ministerial indications of the first forty years after the unification (1861-1900), to the real assessment of the concrete way in which the teaching of the Basic elements of the duties of men and citizens, and then of Rights and Duties of citizens, was taught in the various classes of the primary course, the resulting picture is that of a very detailed and complex reality, involving different factors that were destined to affect, sometimes significantly, the scope and the actual effects of such a teaching.

⁴² *Istruzioni speciali. IV. Storia d'Italia, Geografia, Diritti e doveri del cittadino*, in R.D. 29 novembre 1894, n. 525 – *Riforma dei programmi per le scuole elementari*.

Among these factors we should remember, first of all, that of the actual teaching practice that characterized the teaching of Basic elements of the duties of men and citizens, and then of Rights and Duties of citizens. We can affirm, especially in the light of Matteucci's Inquiry of 1864 on the condition of public education in the Kingdom of Italy (1864)⁴³ and of the one carried out by Francesco Torraca (1895-1896) thirty years later on primary education⁴⁴, that the problems found are in many ways similar to those that characterized the teaching of the other disciplines. Moreover, there are significant differences between rural schools and urban schools, qualified teachers and teachers without the title (and with a superficial, if not totally lacking, culture and education), geographical areas where – especially from the late eighties – the will to educate the future generations to a firm civil and national consciousness was stronger, and areas where there is still, in public opinion and in local administration, a lack of sensitivity on the subject.

Considering Matteucci's Inquiry of 1864, if we look at the answers provided by the provincial inspectors to the «Questions about teaching», and, in particular, those relating to the «Question 6°. What subjects are studied and learnt more, and which less, in Primary Schools?», the resulting picture is really distressing: the teaching of Basic elements of the duties of men and citizens was largely ignored by the teachers, due to their lack of experience in the matter or because they considered it less important and useful than the other disciplines. Only in the better cases, it was very superficially explained, so that that in no area of the Italian peninsula it was taught with a minimum of continuity and in a systematic way. So, if in Turin «reading, writing, dictation exercises, the sacred history, and positive things» and even the «Italian grammar», which is often badly taught and «studied with some difficulties» are preferred to its teaching; in Milan, where «the subjects that requires the mere exercise of memory were studied and learnt, such as catechism, sacred history, poems and tales»; the Basic elements of the duties of men and citizens «are taught very little», especially in rural schools.

The situation in central and southern Italy was not very different: in Bologna, the disciplines taught with a minimum of continuity are «reading, writing, arithmetic. In the teaching of the language there is a significant progress in comparison to the past»; while in Lucca «the teaching of the most difficult subjects for the children's intelligence», including the Basic elements of the duties of men and citizens, is totally neglected, «because unfortunately, the majority of the teachers, and especially poorer ones, are not sufficiently capable to teach these subjects, or they want to deal with it only a little, or even not

⁴³ *Sulle condizioni della pubblica istruzione nel regno d'Italia. Relazione generale presentata al Ministro dal Consiglio Superiore di Torino*, Milano, Stamperia Reale, 1865.

⁴⁴ F. Torraca, *Relazione a S.E. il Ministro dell'Istruzione Pubblica, sull'Istruzione elementare nell'anno scolastico 1895-96*, «Bollettino Ufficiale del Ministero dell'Istruzione Pubblica», A. XXIV, 29 novembre 1897, vol. 2, suppl. al n. 47.

at all». The situation was the same in Palermo, Cagliari and Naples, where the greatest achievement for the pupils of the primary school seems to be the learning of subjects such as «reading, writing, religion and calligraphy», while a discipline as Basic elements of the duties of men and citizens was of a very little interest for the teachers and the students, so as not to be even considered among those poorly learnt («Arithmetic, the metric system, geometric elements and composition are less learnt»)⁴⁵.

After more than thirty years, at the end of the nineteenth century, even after deep changes in the school system, the situation was still very serious, as the assessments made by the ministerial inspectors, as part of the Inquiry on primary education of 1895-1896, testified. «According to the programs – Francesco Torraca’s report states – these three teachings [Italian History, Geography and Rights and Duties of citizens] must help one another to reach an educational, moral and patriotic purpose. The facts, in general, does not correspond to the intentions, desires». And, as a proof of this strict evaluation, Francesco Torraca reported a series of judgments drawn from the inspections carried out in the schools of the entire peninsula.

So, if in the primary schools of the area of Paola (Calabria) the three disciplines were taught requiring «a useless mnemonic exercise, which has left the souls of the pupils cold and indifferent to them», in the district of Lanciano (Abruzzo) the behaviour of the students testified, without doubts, that these disciplines «were not taught in relation to practical life, but separately, unconnected with the rest, being nothing more than a simple mnemonic exercise». In the area of Conegliano (Veneto) the inspector had failed «to prevent that history and geography and the rights and duties are reduced to a simple repetition by heart», while in the area of Rovigo, «if geography was taught, history and rights and duties are completely neglected», and «not taught at all».

In many schools in the area of Piacenza, the three disciplines were «still studied by heart», and although the textbooks «were abolished in the lower classes, many teachers use them in secret, or they dictate historical stories, which are then learnt by heart and recited by the pupils parrot-fashion». The situation of «the teaching of history, geography and rights and duties in the schools of the area of Mantua» was very similar, and the inspector deplored that «the teachers always turn on the memory of the students, teaching clandestinely these subjects, using textbooks, which are prohibited in the lower classes, or dictation exercises, that often contain errors, because the teacher does not have always the time to control the notebooks of all the pupils»⁴⁶.

⁴⁵ *Sulle condizioni della pubblica istruzione nel regno d'Italia. Relazione generale presentata al Ministro dal Consiglio Superiore di Torino*, cit., pp. 463-466.

⁴⁶ Torraca, *Relazione a S.E. il Ministro dell'Istruzione Pubblica, sull'Istruzione elementare nell'anno scolastico 1895-96*, cit., pp. 46-48.

In this regard, Francesco Torraca's conclusions in the *Relazione a S. E. il Ministro dell'Istruzione Pubblica, sull'istruzione elementare nell'anno 1895-96* (Report to the Minister of Education, on primary education in the year 1895-96) were particularly significant. If it was true, he wrote, citing the cases of the urban schools of Bologna and Perugia, that there were experiences on the basis of which «one could argue that the teaching of history, geography and rights and duties [...] is given in some geographical areas following the best standards of teaching», it was equally true that «these seem to be exceptions». Torraca concluded admitting «that some inspectors had exaggerated a little», but there was no doubt that these teachings, the most «suitable to inflame the heart» of the boys, were taught «badly almost everywhere»⁴⁷.

A series of factors had a great influence on the meaning and impact of the teaching of Basic elements of the duties of men and citizens in primary schools, and then of Rights and Duties of the citizen, especially in relation to the themes of civil and political education and the construction of a national identity in the new generations. Among them we remember, above all, the lacks and structural delays which marked, even in the last phase of the nineteenth century, the more general process of literacy and education of the working classes. The data we have are, in this respect, significant. In the year 1891-1892, on the total number of 2,266,593 students enrolled in public primary schools, those who attended the third class were 287,171, while the number of pupils of the fifth class was of 45,281⁴⁸. A decade later, in the school year 1901-1902, the children dispensed from the compulsory education were 214,300, while those entitled to present to the licensing exams at the end of fifth grade were only 27,079⁴⁹.

The data on compulsory education recorded by the ministerial Inquiry of 1897-1898 broadly confirm the limitations that, especially in the Italian rural areas and small towns, characterized the spread of popular and primary education. It is sufficient to say that in 1895-1896, 805,818 school-age children were not enrolled in primary school, and that they were 606, 579 the following year, while they were 558,676 in the school year 1897-1898⁵⁰. Moreover, it is necessary to consider that many children regularly attended only the first class, without completing the first three years of school, so that only 1/6 of the

⁴⁷ *Ibid.*, p. 48.

⁴⁸ Ministero di Agricoltura, Industria e Commercio. Direzione Generale della Statistica, *Statistica dell'istruzione elementare per l'anno scolastico 1891-92*, Roma, Tip. Camera dei Deputati, 1893, pp. 57-59.

⁴⁹ Ministero di Agricoltura, Industria e Commercio. Direzione Generale della Statistica, *Statistica dell'istruzione primaria e normale per l'anno scolastico 1901-1902*, Roma, Tip. Bertero, 1906, pp. 73-74.

⁵⁰ See V. Ravà, *Relazione a S.E. il ministro dell'Istruzione Pubblica, sull'istruzione elementare nell'anno scolastico 1897-1898*, «Bollettino Ufficiale del Ministero dell'Istruzione Pubblica», vol. XXVII, 1900, suppl. to the n. 42, pp. 261-270.

enrolled students arrived to the final examination, according to the statistics reported by the investigation of 1895-1896⁵¹.

Given such a resulting picture, it is undoubtedly right what Simonetta Soldani wrote a few years ago about the fact that, with «a such reduced schooling period», it was unlikely that the primary school could have, in our country, «a role of civil and patriotic education similar to that of the French or German schools»⁵². More generally, it seems that the forced exclusion from the primary school of a large part of the rural population and of the working classes of the urban centre, and, on the other hand, the delays and lacks of the primary education, both from a methodological-didactic and cultural point of view, contributed largely to frustrate the attempt of the liberal ruling class of the nineteenth century – especially the men of the Left wing of Agostino Depretis and then, above all, of Francesco Crispi – to extend through the primary school the process of construction of citizenship and promotion of civil and political awareness to the entire population, an attempt that was late and not free from ambiguity.

In this regard, Aristide Gabelli wasn't totally wrong when, in 1870, in the periodical «Nuova Antologia», warned the national ruling class not to be mistaken about the role played by the primary school in the promotion of a civic consciousness among the new generations: «Before that the primary schools can constitute the instrument of a true national education for our people, and can become the means to instil growing elements of a rapid civil progress in the generations, many years will pass. It is a work which everybody can and must contribute to, but that no one want to do by himself»⁵³.

[End of the first part]

⁵¹ «According to the collected elements, only 1,670,092 on a total of 2,475,910 students were inscribed to public schools; then 805,818 were missing, a 33 per cent. Private schools and institutes received no more than 160,000 children in their lower classes: also supposing that 150,000 students couldn't go to school for incurable diseases, or other appropriate reasons, there are 500,000 children who received no education. [...]. 263,048 pupils arrived to the final examinations, and therefore the figures were reduced to the 38%; 198,368 passed the examinations, while 73,259 were rejected, in the ratio of 27.75%. So, after three years of compulsory education, without taking into account the 500,000 deserters of the school, from the total number of enrolled students we have to subtract: the 13% of the students of the two lower classes who doesn't pass to the 3rd class, the 38% that does not take the exams, and the 27.75% of the rejected students». (Torraca, *Relazione a S.E. il Ministro dell'Istruzione Pubblica, sull'istruzione elementare nell'anno scolastico 1895-96*, cit., pp. 82-83).

⁵² S. Soldani, *Il Risorgimento a scuola, Il Risorgimento a scuola: incertezze dello Stato e lenta formazione di un pubblico di lettori*, in E. Dirani (ed.), *Alfredo Oriani e la cultura del suo tempo*, Ravenna, Longo, 1985, p. 162.

⁵³ A. Gabelli, *L'istruzione elementare in Italia secondo gli ultimi documenti pubblicati dal Ministero*, «Nuova Antologia», vol. V, n. 13, 1870, p. 198.

Technology and the shaping of a Swedish national identity in the educational work of Selma Lagerlöf, 1900-1907

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ABSTRACT: In the early 1900s Sweden saw an unprecedented societal transformation through ongoing industrialisation, urbanisation, democratisation and new technologies. In 1906-1907 the celebrated Swedish writer Selma Lagerlöf published a book subsequently read by thousands of elementary school children, *The Wonderful Adventures of Nils*. Although Lagerlöf's book was mainly seen as a novel, she was commissioned to write it as a textbook in geography for the Swedish elementary school. One of the aims on the part of the commissioner – the Swedish Association of Elementary School Teachers – was for the book to induce Swedish nationalist sentiment and boost the feeling of a national identity in schoolchildren. The aim of this study is to describe and analyse how various representations of technology were utilised to create the sense of a Swedish national identity in *The Wonderful Adventures of Nils*. A hermeneutic method is employed to analyse the book in relation to the historical context of early 20th century Sweden. It is concluded that technology and human settlements are natural elements of the various landscapes of Sweden, thereby making them as much a part of building a national identity around the physical environment as woods, plains, lakes, animals and plants. The message of the book seems to be that technology is interwoven with society and nature in the formation of modern Sweden. It is impossible to describe the nation and impart nationalism in children without also incorporating technology; it is a human creation and as much a force in shaping the nation as other human endeavours and nature.

EET-TEE KEYWORDS: Children's Books; History of Education; Nationalization; Science and Technology; Selma Lagerlöf, Sweden; XX Century.

Introduction

Industrialisation came relatively late to Sweden, compared to the rest of Europe and North America. It was not until the 1890s that the agricultural population began decreasing in absolute numbers, and consequently this decade is generally seen as the breakthrough for industrialisation¹. The industrial breakthrough meant a much more increased pace of growth in the whole Swedish economy, as well as a marked expansion of the industrial sector's share of the economy². The process of industrialisation was coupled with an optimistic faith in modern technology and economic development³, which led to a radical restructuring of the nation of Sweden on various levels. The share of people living off agriculture thus decreased, which was caused not only by the technical development within agriculture itself but also by people switching to other trades as well as emigration to America, which amounted to over one million people between 1850 and 1920⁴. New communications technologies connected cities and regions and thereby people in various parts of Sweden. Through railways it became easier to travel and transport goods, at the same time as the building of railroads also gave people work. Rails were also often laid through the unexploited countryside, which led to the establishing of new towns in conjunction with the erection of new railway stations⁵.

Nationalism became an important factor in the development of Swedish society around 1900. Apart from the contribution of the emerging industrialism, the dissolution of the 90-year-old union with Norway in 1905 also contributed to nationalist sentiment. Nationalism evolved into an ideological force meant to unite the people of the nation of Sweden into a community of countrymen within the country's borders. Institutions such as the school, the army and the media had as their primary mission to homogenise the nation; Swedish nature

¹ U. Olsson, *Industrilandet*, in B. Furuhausen (ed.), *Äventyret Sverige. En ekonomisk och social historia*, Utbildningsradion & Bokförlaget Bra Böcker, Stockholm, 1993, p. 61; J. Svensson, S. Godlund, K. Godlund, *Norrköpings ekonomiska och sociala historia 1870-1914*, in B. Helmfrid, S. Kraft (edd.), *Norrköpings historia V. Tiden 1870-1914*, Norrköpings stads historiekommitté, Stockholm, 1972, p. 180. The research on which this article is based has also partly provided material for C. Axell, J. Hallström, *Representations of Technology in Educational Children's Fiction in Sweden in the Early 20th Century: The Example of The Wonderful Adventures of Nils*, in K. Stables, C. Benson, M.J. de Vries (edd.), *PATT 25: Cript 8: Perspectives on Learning in Design & Technology Education*, Goldsmiths, University of London, London 2011.

² L. Magnusson, *Sveriges ekonomiska historia*, Stockholm, Rabén Prisma-Tiden Athena, 1996, pp. 301-302.

³ T. Frängsmyr, *Svensk idéhistoria: bildning och vetenskap under tusen år. D. 2, 1809-2000*, Stockholm, Natur och Kultur, 2000, p. 102.

⁴ M. Morell, *Jordbruket och industriomvandlingen*, in E. Giertz (ed.), *Då förändras Sverige: 25 experter beskriver drivkrafter bakom utvecklingen*, Studentlitteratur, Lund, 2008, p. 34; A. Åberg, *Vår svenska historia*, Stockholm, Natur och Kultur, 1993, pp. 419-432.

⁵ Frängsmyr, *Svensk idéhistoria: bildning och vetenskap under tusen år. D. 2, 1809-2000*, cit., pp. 102-103.

played a particularly significant role in this unifying of the nation⁶. Furthermore, the early 20th century was in many ways formative in the sense that there was also an increased spread and use of technology in society⁷.

An investigation of educational children's literature can be seen as an important approach to the responses of the current culture in general and the school in particular to the role of technology in underpinning nationalist sentiment. Children's literature has sometimes been regarded as uninteresting in cultural history due to its 'simplicity' and low status. Hintz, on the other hand, claims that it is precisely because of this that children's fiction should be the object of historical and cultural studies. According to Hintz, the implicit norms and values of a society at a particular historical moment are often hidden in the more sophisticated adult texts, but explicitly expressed in texts for children. Therefore, it is just the simplicity and overly educational message that most clearly reflect the prevailing culture⁸. Even Kelly points to the significance of children's literature in the study of attitudes, since literature contributes to the child's socialisation and adaptation to society⁹.

The aim of this study, therefore, is to describe and analyse how various representations of technology were utilised to create the sense of a Swedish national identity in *The Wonderful Adventures of Nils*. This was Selma Lagerlöf's sole, influential work of educational children's fiction¹⁰. The reason for selecting this book is its nationalist content and the fact that it was selected to be part of a body of literature for the Swedish elementary school in the early 1900s. *The Wonderful Adventures of Nils* consequently constitutes a lens through which various early 20th century views of nationalism, education and the role of technology can be studied, for it was written for schoolchildren of the time and was subsequently read by the thousands in early to mid-twentieth century Swedish schools.

The primary source material is consequently made up of Selma Lagerlöf's *The Wonderful Adventures of Nils*. A hermeneutic method, that is, a method

⁶ C. Nordlund, *Naturen och det nationella i det tidiga 1900-talets Sverigelitteratur*, in A-K. Hatje (ed.), *Sekelskiftets utmaningar*, Carlsson, Stockholm, 2002, p. 74; N. Edling, *Det fosterländska hemmet: egnahemspolitik, småbruk och hemideologi kring sekelskiftet 1900*, Diss., Stockholm, Stockholm University, 1996, p. 369.

⁷ J. Hallström, *Technical knowledge in a technical society: elementary school technology education in Sweden, 1919-1928*, «History of Education», n. 4, 2009, pp. 455-474.

⁸ E.S. Hintz, *Heroes of the laboratory and the workshop: Inventions and technology in books for children, 1850-1950*, in M.M. Elbert (ed.), *Enterprising youth: Social values and acculturation in nineteenth-century American children's literature*, Routledge, New York, 2008, pp. 197-211.

⁹ R.G. Kelly, *Literature and the Historians*, «American Quarterly», 1974, pp. 141-159.

¹⁰ S. Lagerlöf, *The Wonderful Adventures of Nils*, Translated by Velma Swanston Howard. Project Gutenberg E-book, 1906-07/2004, <<http://www.gutenberg.org/cache/epub/10935/pg10935.html>> (accessed December 5, 2014, pagination for iPad e-book). With assistance from Lagerlöf, Swanston Howard edited and shortened certain chapters of the original Swedish version of the book, which is why a few quotes from the original have been translated into English by the authors of this article.

of text interpretation, is employed. Hermeneutics is a theoretical approach to interpreting and understanding the underlying meaning of a text. The hermeneutic sciences seek possible meanings of their study objects, which must in turn be studied in their context(s) to be understood. To clarify the meaning is the main purpose of the interpretation, and the meaning of a part can only be understood if it is related to the context. At the same time the context is composed of the parts. This relationship between the parts and the whole gives rise to the hermeneutic spiral. The spiral shows the relationship between what is interpreted, the pre-understanding that exists and the current context within which interpretation occurs. Thus, single texts are related to the whole body of texts, the genre(s) and the historical context in a reciprocal, re-interpretive way¹¹. The definition of technology (Swedish *teknologi*) prevalent in the early 20th century was narrower than today and included primarily industrial appliances and processes, machines and inventions¹². In line with the hermeneutic approach, when analysing representations of technology and views of technology in Nils we are also influenced by the broader definition of technology common today; it comprises technology as a way of solving problems in all facets of society, not just the industrial domain¹³.

In the existing historical research on the relationship between literature, technology and society, children's literature for a younger audience is generally not included and thus sparsely explored. The limited previous research which deals with the subject is mainly from the UK and the US, and it mainly examines literature written before 1900. A likely reason for this is that many researchers find the time when Western society was being industrialised as particularly interesting to investigate from this perspective. In children's literature technology has historically also served as an agent for discovering the unknown, for example, through air and space travels, which began emerging after 1900. A large part of the existing research is therefore about how inventors and aviators have been acting as heroes and role models to instill morality, patriotism and traditional values in the young readers¹⁴.

Pandora explores the connections between childhood, nature and scientific citizenship¹⁵. She does this by analyzing some key texts about nature, science

¹¹ P. Burke, *History and Social Theory*, Cambridge, Polity Press, 1992; P.-J. Ödman, *Tolkning, förståelse, vetande. Hermeneutik i teori och praktik*, Stockholm, Norstedts, 2007.

¹² E. Schatzberg, *Technik comes to America. Changing meanings of technology before 1930*, «Technology and Culture», n. 3, 2006, pp. 486-512.

¹³ J. Hallström, M. Hultén, D. Lövheim, *The study of technology as a field of knowledge in general education: historical insights and methodological considerations from a Swedish case study, 1842-2010*, «International Journal of Technology and Design Education», n. 2, 2014, pp. 121-139.

¹⁴ C. Axell, *Barnlitteraturens tekniklandskap. En didaktisk vandring från Nils Holgersson till Pettson och Findus*, Diss., Linköping, Linköping University, Dept. of Social and Welfare Studies, 2015.

¹⁵ K. Pandora, *The children's republic of science in the Antebellum literature of Samuel*

and technology, written by some of the most popular children's authors at the time before the American Civil War of the 1860s: Samuel Griswold Goodrich and Jacob Abbott. The two writers believed that through their literature they could contribute to shaping America's future citizens and have an influence on the future destiny of the Republic. They regarded their work as useful in school classrooms and teaching as well as in the home. The authors' aim was not to create scientists, but for each citizen to achieve a sense of scientific citizenship in order to gain access to the rights and privileges of such a status. Abbott's progressive pedagogical approach was that teachers and parents should seek knowledge together with the children, but adults should not always have the answers. Abbott argued that it was the search for knowledge that was important. In line with this children's fiction books became tools by which young readers could be made to seek knowledge. The goal was, in Pandora's words, «a children's republic of science»¹⁶.

Eric Hintz's study is another similar example of the previous problematic. In the anthology *Enterprising Youth: Social Values and Acculturation in Nineteenth-Century American Children's Literature* (2008) he examines a number of biographies written between 1850 and 1900. One of his aims is to find out what the writers may have wanted their readers to learn about technology when they chose inventors as main characters in the books. Hintz notes that the inventor Thomas Edison became popular in biographies written for the younger generation around the turn of the century; their primary purpose was to inculcate morality in the young readers. Hintz study shows that the inventors not only were to set an example for and instill values of their profession, but also a large number of other social values such as Christian asceticism, temperance and patriotism. These values were expressed through examples that would have been familiar to the children of the time, for example, the homes of the inventors, their families, schooling, clothes and food. Hintz concludes by saying: «In the transitional world of the late nineteenth century, inventors were the new heroes straddling the old and the new, simultaneously creating a new technological society while demonstrating traditional morals and values»¹⁷.

John McCannon's research explores a technological context outside the Western world. McCannon studied the ways in which children's writers used technology and science as tropes to create visions of the USSR as a modernist utopia (2001). The literature examined is from 1921 to 1932. According to McCannon the authorities in education and culture during Lenin's and Stalin's regimes were convinced that children's literature could be used to shape the

Griswold Goodrich and Jacob Abbot, in C.E. Harrison, A. Johnson (edd.), *National identity: The role of science and technology*, University of Chicago Press, Chicago, 2009.

¹⁶ *Ibid.*, p. 75.

¹⁷ Hintz, *Heroes of the laboratory and the workshop: Inventions and technology in books for children, 1850-1950*, cit., p. 209.

young Soviet citizens and was therefore developed to become an educational tool under the Communist regime. In Samuil Marshaks children's book *War with the Dnieper* (1931), the construction of a hydroelectric dam is depicted as a war against the river. The goal of the dam is to tame the river's water to provide electricity to the region. The river is mighty but the real «heroes» are the machines, the steam excavator and the crane. McCannon claims that the Soviet regime used children's literature as a tool to convey that they had reached the goal of creating a socialist utopia. At the same time there is a message that technology is humanity's strongest weapon to conquer and triumph over nature¹⁸.

1. *Technology and Nationalism in The Wonderful Adventures of Nils*

Around the turn of the century 1900 a significant educational shift was taking place within the Swedish community of elementary school teachers. They questioned the influence of the church on the school, and they also started producing their own textbooks. This was also a renaissance period for children's literature generally, and there was a growing literature published for the specific purposes of schooling. The elementary school therefore became a vehicle for the spread of new children's literature, general as well as educational¹⁹.

In January 1901 the Swedish Association of Elementary School Teachers appointed a committee that was to produce a modern reading book for the elementary school, and they soon contacted the celebrated writer Selma Lagerlöf. She was their choice not only because of her writing skills but also her background as an elementary teacher²⁰. Alfred Dalin, the association's representative, had in mind a collection of instructive texts such as stories, tales, legends and poems, which described the country and people of Sweden²¹. Lagerlöf was generally positive but questioned the outline of the project. She wanted to focus what every child needed to know about – the country of Sweden – but she was critical of the fact that the children would not gain any

¹⁸ J. McCannon, *Technological and scientific utopias in Soviet children's literature, 1921-1932*, «Journal of Popular Culture», n. 4, 2001, pp. 153-169.

¹⁹ M. Ekholm, *Den hållbaraste läroplanen – 1919 års undervisningsplan för rikets folkskolor*, «Vägval i skolans historia. Tidskrift från föreningen för svensk undervisningshistoria», n. 3-4, 2006, pp. 3-5; T. Englund, *Tidsanda och skolkunskap*, in G. Richardson (ed.), *Ett folk börjar skolan. Folkskolan 150 år 1842-1992*, Allmänna Förlaget, Stockholm, 1992, pp. 95-103.

²⁰ V. Edström, *Uppdrag läsebok Nils Holgersson. Presentation och urval av Vivi Edström*, Falun, Rabén & Sjögren, 1996, pp. 9-10.

²¹ E. von Zweigbergk, *Barnboken i Sverige 1750-1950*, Stockholm, Rabén & Sjögren, 1965, p. 310.

coherent knowledge²². Therefore she gave Dalin a more progressive counter-proposal:

Animals and plants should also be included, but all of them integrated in the kind of landscape where one would expect that they typically live. To the extent that nine-year-old children would follow, they should be familiar with life in the mine, in the forest [...] at fishing and hunting, log-driving and farming, and, why not, at the factory and in the city²³.

At the end of 1903 Lagerlöf started collecting information for her book. In 1905 she got the idea through Rudyard Kipling's *The Jungle Book* to animate the landscape with talking animals, and Nils could make rapid progress since he was flying on a goose²⁴.

In 1906 the first part of the extensive children's book *The Wonderful Adventures of Nils* was published in Sweden, and during 1907 the publisher could print 100,000 copies of the school edition since practically every elementary school introduced it as a reading book. The book was a great success, not only as a textbook but later also as a literary classic. Hardly any Swedish book has attracted so great an audience and captured so many readers of all ages and all nationalities. By its position as an officially commissioned textbook Nils was extremely influential on generations of Swedish schoolchildren, thereby constituting an important tool for the dissemination of nationalist views of technology and nature in line with the development of modern, industrial Sweden²⁵.

The book is about the fourteen-year-old boy Nils. In the beginning of the book he is lazy, disobedient and cruel to animals, and he does not want to learn anything in school. One day his parents go to church, but Nils refuses to come along and is required to read Luther's sermons instead. He finds them boring and the beautiful spring weather outside makes him sleepy. Then suddenly a little elf pops up and Nils captures him. The elf asks to be set free and he offers Nils some valuable items in compensation if he gives him freedom. Nils does not think there is much to offer, but lets him go free anyway. The moment he does so he gets a slap in the face and becomes unconscious. When he wakes up he discovers that he himself has turned into a little elf who also understands the language of animals. A flock of wild geese flies past and after some commotion Nils follows them on a journey through Sweden, flying over countryside as well

²² S. Lagerlöf, *Selma Lagerlöf. Brev 2 1903-1940 i urval utgivna av Ying Toijer-Nilsson*, Selma Lagerlöf-sällskapet Skrifter 8, Malmö, Gleerups, 1969.

²³ S. Lagerlöf, *Selma Lagerlöf. Brev 1 1871-1902 i urval utgivna av Ying Toijer-Nilsson*, Selma Lagerlöf-sällskapet Skrifter 7, Malmö, Gleerups, 1967, p. 252 (our translation).

²⁴ Lagerlöf, *Selma Lagerlöf. Brev 2 1903-1940 i urval utgivna av Ying Toijer-Nilsson*, cit.; E. von Zweigbergk, *Barnboken i Sverige 1750-1950*, p. 312.

²⁵ E. Erlandson-Hammargren, *Från alpromantik till hembygdsromantik. Natursyn i Sverige från 1885 till 1915, speglad i Svenska Turistföreningens årsskrifter och Nils Holgerssons underbara resa genom Sverige*, Stockholm, Gidlunds Förlag, 2006.

as city, important historical sites as well as industrial establishments. The book is a kind of bildungsroman in the tradition of Rousseau's *Émile*, and during his travels Nils evolves into a nice and responsible young man. This positive development mainly happens as Nils discovers all the wonderful things that humans have achieved in Sweden, and in many of the book's passages various inventions and technologies are celebrated²⁶.

Lagerlöf has been described as the most technology-friendly of the Swedish writers at the beginning of the 20th century. Edström writes that Nils is «amazed by all the new technology that he discovers during his journey: rail roads and factories, sawmills and ironworks»²⁷. Hägg stresses the importance of the chapter on the ironworks of Bergslagen and all the good things that iron has given man²⁸. Sundmark claims that Lagerlöf was a firm believer in progress: technological, economic and social. Things would always get better. Lagerlöf shows her enthusiasm over, for instance, sawmills, mines and ironworks. In Sundmark's interpretation, even the poorest parts of the country would benefit from this progress; as such, technology would contribute to developing the nation²⁹.

Elenius sees the story of Nils as an illustration of the ideal picture of the nation of Sweden around the turn of the century 1900, or, alternatively, as a merger of several different ideals from different parts of the country. Furthermore, Northern Sweden – Norrland – received quite a prominent place in the book since 21 out of the 96 chapters take place in the northern region. The direction Nils is going is from south to north, which Elenius regards as a metaphor of modernity and progress being in the north while tradition and retrospection are to be found in the south³⁰:

Amid all the objects in motion there was only one that stood still: that was a railway train. [...] The locomotive sent forth smoke and sparks. The clatter of the wheels could be heard all the way up to the boy, but the train did not seem to move. The forests rushed by; the flag station rushed by; fences and telegraph poles rushed by; but the train stood still. A broad river with a long bridge came toward it, but the river and the bridge glided along under the train with perfect ease. Finally a railway station appeared. The station master stood on the platform with his red flag, and moved slowly toward the train. When he waved his little flag, the locomotive belched even darker smoke curls than before, and whistled

²⁶ Lagerlöf, *The Wonderful Adventures of Nils*, cit. Cf. V. Edström, *Selma Lagerlöf. Livets vågspel*, Stockholm, Natur och Kultur, 2002.

²⁷ Edström, *Uppdrag läsebok Nils Holgersson. Presentation och urval av Vivi Edström*, cit., p. 23 (our translation).

²⁸ G. Hägg, *Det nygamla riket – det industriella genombrottets avspeglingar i svenskt kulturliv*, in P. Elmlund, K. Glans (edd.), *Den välsignade tillväxten. Tankelinjer kring ett århundrade av kapitalism, kultur och vetenskap*, Stockholm, Natur och Kultur, 1998, pp. 53-54.

²⁹ B. Sundmark, *Citizenship and Children's Identity in The Wonderful Adventures of Nils and Scouting for Boys*, «Children's Literature in Education», 2009, pp. 109-119.

³⁰ L. Elenius, *Selma Lagerlöf och Norrland: Nationella idealbilder i Nils Holgerssons underbara resa*, in A-K. Hatje (ed.), *Sekelskiftets utmaningar*, Carlsson, Stockholm, 2002, pp. 16-38.

mournfully because it had to stand still. All of a sudden it began to move toward the south, like everything else. The boy saw all the coach doors open and the passengers step out while both cars and people were moving southward. He glanced away from the earth and tried to look straight ahead. Staring at the queer railway train had made him dizzy [...] ³¹.

In the above passage, Nils' experience is that the train beneath them stands still – it is the landscape which is moving towards the train, not the other way around – since he is travelling with the geese at the same speed as the train. Thus it would seem that the northern parts of Sweden are sliding closer and closer to the southern parts. The various parts of the country are being connected, and this process is taking place without any kind of difficulty or resistance. Technology – the railway – is a link that ties together the nation and Nils travels in the same direction as the train: towards Norrland where important natural resources are to be found.

Around the turn of the century 1900 Sweden was involved in an international industrial race for market shares. It was therefore thought by engineers and representatives of forest companies and industries that a national unified ideology of economic development would be a competitive advantage for Swedish interests in this struggle. An important part of this ideology was the utilization of the great natural resources of northern Sweden ³². Extended communications networks were a prerequisite for connecting the various regions into a unified nation, and what made it possible to utilize the natural resources was the railroad. At the same time roads and steam boat lines were also expanded, so it became possible to travel to the farthest ends of Sweden much more easily than ever before, both for the more and less wealthy. Northern Sweden was looked upon with great optimism and especially the iron ore deposits made industrialists talk about the region as a treasury ³³. In *The Wonderful Adventures of Nils* it is with the help of the railroad that the wilderness of the north is conquered; this technological system can even be interpreted as a metaphor for the colonisation of Norrland by the Government in Stockholm. The passage below is one example in the book of a patriotic and nationalist view of the northern natural resources. Nature is viewed as a resource for humans, whereas the untouched wilderness and the Lapps who live there are considered insignificant:

³¹ Lagerlöf, *The Wonderful Adventures of Nils*, cit., pp. 458-459.

³² K. Johannisson, *Det sköna i det vilda: En aspekt på naturen som mänsklig resurs*, in T. Frängsmyr (ed.), *Paradiset och vildmarken: Studier kring synen på naturen och naturresurserna*, Liber Förlag, Stockholm, 1984, pp. 69-70; S. Sörlin, *Framtidslandet: debatten om Norrland och naturresurserna under det industriella genombrottet*, Diss., Stockholm, Carlsson, 1988.

³³ Sörlin, *Framtidslandet: debatten om Norrland och naturresurserna under det industriella genombrottet*, cit.; Id., *Norrlandsfrågan: Idéer och debatt i samband med det industriella genombrottet*, in T. Frängsmyr (ed.), *Paradiset och vildmarken: Studier kring synen på naturen och naturresurserna*, Stockholm, Liber Förlag, 1984, pp. 265-319.

See, it had been so, that although people very long had known that there was a large iron ore field near Gellivare, the mining had really been started only a few years ago, when the railway was completed. By then, several thousand people flocked up there at once [...]. There was the railway and electric light and large machine buildings, one could go on tramway deep inside the mountain through a tunnel, which was illuminated by small light bulbs. It was the mightiest movement everywhere, and one train with iron ore after another was sent from the station. But all around was the vast wilderness, where no field was plowed and no houses built, where there was nothing else than the Lapps, who wandered around with their reindeer³⁴.

In the description of the Gellivare iron ore mining industry it is the railroad that has enabled both the utilisation of these natural resources and technological development in the wake of the mining industry such as electric light. As all this takes place we find the Laps in the backdrop, only as a part of the surrounding scenery.

The colonisation of the wilderness and minority peoples in the name of progress, technology and the nation was only natural, in line with the evolutionary thinking of the time. Darwinism, of course, gave a kind of scientific legitimacy to this development, although it was really one of several evolutionary lines of thought that had developed in the late 19th century as an industrial society arose all over Europe. Utopian socialists, scientists and influential writers such as Robert Owen, William Morris, Auguste Comte and Herbert Spencer all outlined their views of a future ideal society, in which struggle and competition were seen as integral parts³⁵. Hård and Jamison are of the view that the most important view or ideology was that of Karl Marx, whose most significant source of inspiration was Darwin's theory of evolution. Darwin presented the basic laws of nature based on his observations of the natural world, while Marx presented his theories of societal evolution. Marx was driven by his strong belief that science and technology could transform society and release human creativity. Inventiveness is one of the most characteristic traits of industrial society, according to Marx³⁶.

Human – and in particular Swedish – inventiveness is a recurring theme and something that is even applauded in *The Wonderful Adventures of Nils*. When

³⁴ S. Lagerlöf, *Nils Holgerssons underbara resa genom Sverige. Bd 2*, Stockholm, Bonnier, 1908, pp. 567-568 (our translation).

³⁵ T. Frängsmyr, *Framsteg eller förfall: Framtidsbilder och utopier i västerländsk tanketradition*, Stockholm, Allmänna förlaget, 1990, pp. 188; K. Berg, *Livingstone och Stanley. Synen på Afrikas natur*, in T. Frängsmyr (ed.), *Paradiset och vildmarken: Studier kring synen på naturen och naturresurserna*, Liber Förlag, Stockholm 1984, pp. 159-197; P.J. Bowler, *The earth encompassed: a history of the environmental sciences*, New York, Norton, 1992, pp. 310-314; B. Skovdahl, *Förlorad kontroll: den ifrågasatta framstegstanken*, Stockholm, Institutet för framtidsstudier, 2010, pp. 61; D. Worster, *De ekologiska idéernas historia*, Stockholm, SNS, 1996, pp. 130-137.

³⁶ M. Hård, A. Jamison, *Hubris and hybrids: A cultural history of technology and science*, New York, Routledge, 2005, pp. 65-66.

Nils comes to the town of Karlskrona he is fascinated by the fact that such great and beautiful war ships have been built in Sweden:

Soon they came into a large hall, which was filled with tackled and full-rigged little ships. The boy understood without being told, that these were models for the ships which had been built for the Swedish navy. There were ships of many different varieties. There were old men-of-war, whose sides bristled with cannon, and which had high structures fore and aft, and their masts weighed down with a network of sails and ropes. There were small island-boats with rowing-benches along the sides; there were undecked cannon sloops and richly gilded frigates, which were models of the ones the kings had used on their travels. Finally, there were also the heavy, broad armour-plated ships with towers and cannon on deck – such as are in use nowadays; and narrow, shining torpedo boats which resembled long, slender fishes. When the boy was carried around among all this, he was awed. «Fancy that such big, splendid ships have been built here in Sweden!» he thought to himself³⁷.

Through all the innovations and technical solutions that Nils encounters during his travels he thus becomes aware of human inventiveness, an important asset in forming the nation. As Nils is walking around in another town he sees a sowing machine. For a short moment he forgets that he is an elf, and climbs up to the driver's seat to pretend that he is driving the machine³⁸. During his walk through the town he gets to see more things that confirm his notion of human inventiveness:

He walked by the post-office, and then he thought of all the newspapers which came every day, with news from all the four corners of the earth. He saw the apothecary's shop and the doctor's home, and he thought about the power of human beings, which was so great that they were able to battle with sickness and death. He came to the church. Then he thought how human beings had built it, that they might hear about another world than the one in which they lived, of God and the resurrection and eternal life. And the longer he walked there, the better he liked human beings³⁹.

This passage refers to both older and newer technologies that are important for the cohesiveness of a society: communications technologies such as newspapers and, in this context, the church for voicing central national values connected to Lutheran Christianity, as well as health care. Both the last passages are also permeated with a strong belief in progress and technological development.

There is a section in Nils that is often referred to as an example of Lagerlöf's positive attitude to industrialization and innovation, namely when Nils is in Bergslagen and is taken captive by a family of bears⁴⁰. The bears discuss the ironworks and the fact that they no longer feel comfortable living there. They wonder where to go in order to escape humans. Father Bear then gets an idea.

³⁷ Lagerlöf, *The Wonderful Adventures of Nils*, cit., p. 136.

³⁸ *Ibid.*, p. 108.

³⁹ *Ibid.*

⁴⁰ Hägg, *Det nygamla riket – det industriella genombrottets avspeglingar i svenskt kulturliv*, pp. 53-54.

Since Nils tried to frighten the bears by lighting a match stick Father Bear realises what kind of power Nils has when he can utilise fire. The bear then gives Nils an ultimatum; Nils will live if he sets the rolling-mill on fire. Nils asks for a little time to do some thinking: «“Very well, do so”, assented Father Bear. “Let me say to you that iron is the thing that has given men the advantage over us bears, which is another reason for my wishing to put an end to the work here”»⁴¹. Nils reflects upon the great use that humans have had from iron, which is used in all sorts of technology:

There was iron in the plough that broke up the field, in the axe that felled the tree for building houses, in the scythe that mowed the grain, and in the knife, which could be turned to all sorts of uses. There was iron in the horse’s bit, in the lock on the door, in the nails that held furniture together, in the sheathing that covered the roof. The rifle which drove away wild beasts was made of iron, also the pick that had broken up the mine. Iron covered the men-of-war he had seen at Karlskrona; the locomotives steamed through the country on iron rails; the needle that had stitched his coat was of iron; the shears that clipped the sheep and the kettle that cooked the food. Big and little alike – much that was indispensable was made from iron. Father Bear was perfectly right in saying that it was the iron that had given men their mastery over the bears⁴².

But Nils attaches even greater importance to iron: «Perhaps it was because they had thought so much about the iron that intelligence had been developed in mankind, until finally they became so advanced that they were able to build great works like these. The fact was that men owed more to the iron than they themselves knew»⁴³. This quote is interesting bearing in mind that Swedish export at the time was becoming increasingly dependent on the iron ore deposits in the north⁴⁴. Sweden thus owed more to the iron than most people knew, which was why iron gained such a prominent position in a book for elementary schoolchildren.

Iron and the bear can be seen as metaphors for the struggle between industrialisation and technology (iron) and nature (the bear). Even though the bear claims that he and his ancestors have inhabited this region of Sweden since the beginning, it is humans with their superior intellect that are the winners of the fight⁴⁵. And Father Bear confirms this interpretation with the words: «“[i]t’s because of the iron that men have become so much wiser than we bears”»⁴⁶.

⁴¹ Lagerlöf, *The Wonderful Adventures of Nils*, cit., p. 348.

⁴² *Ibid.*, p. 349.

⁴³ *Ibid.*, p. 350.

⁴⁴ Cf. B. Berner, *Professional or Wage Worker? Engineers and Economic Transformation in Sweden*, in P. Meiksins, C. Smith (edd.), *Engineering Labour: Technical Workers in Comparative Perspective*, London & New York, Verso, 1996, pp. 173-174.

⁴⁵ Cf. Erlandson-Hammargren, *Från alpromantik till hembygdsromantik. Natursyn i Sverige från 1885 till 1915, speglad i Svenska Turistföreningens årsskrifter och Nils Holgerssons underbara resa genom Sverige*, cit.

⁴⁶ Lagerlöf, *The Wonderful Adventures of Nils*, cit., p. 349.

After some reflection Nils makes a decision: «No plan of escape had as yet come to his mind, but this much he knew – he did not wish to do any harm to the iron, which was so useful to rich and poor alike, and which gave bread to so many people in this land»⁴⁷. Iron technology was thus considered so crucial for the development of the nation, across all socio-economic boundaries of society, that it required sacrifice on the part of the protagonist.

The fascination of human inventiveness and ability to create technology is what makes Nils forget for a moment about the life-threatening situation:

Father Bear let the boy watch the gorgeous spectacle until the blowing was over and the flowing and sparkling red steel had been poured into ingot moulds. The boy was completely charmed by the marvellous display and almost forgot that he was imprisoned between a bear's two paws⁴⁸.

Furthermore, the message conveyed here is that industry, especially iron and steel production, is something beautiful and «natural», a «marvellous display». Technology is also often depicted as seamlessly interwoven with nature since it is surreptitiously integrated with the various Swedish landscapes:

The great ironworks, with many tall buildings, stood at the edge of a waterfall. High chimneys sent forth dark clouds of smoke, blasting furnaces were in full blaze, and light shone from all the windows and apertures. Within hammers and rolling mills were going with such force that the air rang with their clatter and boom. All around the workshops proper were immense coal sheds, great slag heaps, warehouses, woodpiles, and tool sheds. Just beyond were long rows of workingmen's homes, pretty villas, schoolhouses, assembly halls, and shops. But there all was quiet and apparently everybody was asleep. The boy did not glance in that direction, but gazed intently at the ironworks. The earth around them was black; the sky above them was like a great fiery dome; the rapids, white with foam, rushed by; while the buildings themselves were sending out light and smoke, fire and sparks. It was the grandest sight the boy had ever seen!⁴⁹

In one passage of the book Nils experiences three different Swedish landscapes or communities from the back of the goose. The first one is the valley with its deep troughs and rivers, on which there are steamboats, timber rafting, large cargo vessels and on the adjacent waterfront sawmills. In the second landscape are the farms, villages and churches. Here the farmers sow and there are green meadows, grazing cattle, meandering roads and hissing railway engines. The third landscape is the forest with elks, lynx and squirrels as well as mines and ironworks, which are portrayed in an idyllic fashion:

⁴⁷ *Ibid.*, p. 351.

⁴⁸ *Ibid.*, p. 346.

⁴⁹ *Ibid.*, p. 344.

Cableways ran through the air, on which baskets, loaded with iron ore, slowly went along. In all rapids wheels were spinning, electric wires stroked through the silent forest, and immensely long railway trains came rolling with sixty, seventy wagons, loaded with iron ore and coal, or with iron bars, sheets and steel wire⁵⁰.

Thus in *The Wonderful Adventures of Nils* technology is intertwined with the pastoral landscape, which contributes to the image of a nation with various landscape types where technology and industry always have a natural place. In the following passage about the Östergötland plain, the integration of nature and technology even takes on an aesthetic dimension, which was an important part of the forming of a national landscape at the time⁵¹:

But the people must have been contented on the plain, because it was generous and kind, and they had tried to decorate it in the best way possible. High up – where the boy rode by – he thought that cities and farms, churches and factories, castles and railway stations were scattered over it, like large and small trinkets. It shone on the roofs, and the windowpanes glittered like jewels. Yellow country roads, shining railway-tracks and blue canals ran along between the districts like embroidered loops. Linköping lay around its cathedral like a pearl setting around a precious stone; and the gardens in the country were like little brooches and buttons. There was not much regulation in the pattern, but it was a display of grandeur, which one could never tire of looking at⁵².

The nationalisation of Swedish nature of the early 20th century, of which the diffusion of *The Wonderful Adventures of Nils* to Swedish elementary schools was an integral part, consequently also included technology.

David Nye claims that the machine, the railway engine, the steamboat and the telegraph were all seen as part of the sublime landscape at the time; they could therefore be incorporated in pastoral paintings as a harmonious part. This mix of nature and technology was something that was supported by railway owners, and paintings of this kind were therefore promoted⁵³. Michael L. Smith uses well-known lithographies from the 1860s to the 1950s as examples of how trains were used as positive metaphors of progress; technology is portrayed as a train rushing towards the unknown future beyond the picture⁵⁴. At the same time Earl G. Ingersoll and Leo Marx show how the railway metaphor was used in the opposite way, that is, as a reaction to industrialisation and progress. These kinds of illustrations and paintings instead portray a quiet pastoral landscape

⁵⁰ Lagerlöf, *Nils Holgerssons underbara resa genom Sverige. Bd 2*, p. 356 (our translation).

⁵¹ Cf., for example, C. Nordlund, *Det upphöjda landet. Vetenskapen, landhöjningsfrågan och kartläggningen av Sveriges förflutna, 1860-1930*, Diss., Umeå, Umeå University, Dept. of Historical Studies, 2001, pp. 260-279.

⁵² Lagerlöf, *The Wonderful Adventures of Nils*, cit., pp. 267-268.

⁵³ D.E. Nye, *American technological sublime*, Cambridge, Mass., MIT Press, 1994, p. 59.

⁵⁴ M.L. Smith, *Recourse of empire: landscapes of progress in technological America*, in M.R. Smith, L. Marx (edd.), *Does technology drive history? The dilemma of technological determinism*, Cambridge, Mass., MIT Press, 1994, pp. 37-52.

being brutally invaded by a steam locomotive⁵⁵. In *The Wonderful Adventures of Nils* it is mainly the former type of positive metaphors of technology that are being used, as was shown above.

In the part of Nils about the region of Småland, Osa interrupts Little Mats when he complains about how lean and barren the landscape is, as she does not agree:

«And don't you remember», continued Osa, «the school teacher said that such a lively and picturesque district as that bit of Småland which lies south of Lake Vettern is not to be found in all Sweden? Think of the beautiful sea and the yellow coast-mountains, and of Grenna and Jönköping, with its match factory, and think of Huskvarna, and all the big establishments there!» «Yes, that's true enough», said little Mats once again. «And think of Visingsö, little Mats, with the ruins and the oak forests and the legends! Think of the valley through which Emån flows, with all the villages and flour-mills and sawmills, and the carpenter shops!» «Yes, that is true enough», said little Mats, and looked troubled⁵⁶.

Thus when technology is integrated in the landscape there is no separation of humans, nature and technology in the forming of the nation; together they form a cohesive and indivisible whole. Through inventiveness and the striving for progress humans create something beautiful and natural, which is reinforced by metaphors from nature:

«This country is clothed in a kirtle of spruce and greystone sweater», the boy thought to himself. «But around the waist it wore a belt, which has not its equal in costliness, for it is embroidered with distant blue lakes and flowering meadows, the large iron works adorn it as a series of precious stones, and as buckle it has a whole town with castles and churches and large clusters of houses»⁵⁷.

In the ironworks other metaphors are used, making the bars of iron into snakes:

But while the first bar of iron was being pressed, a second was taken from the furnace and placed under the rollers, and when this was a little along, a third was brought. Continuously fresh threads came crawling over the floor, like hissing snakes. The boy was dazzled by the iron. But he found it more splendid to watch the workmen who, dexterously and delicately, seized the glowing snakes with their tongs and forced them under the rollers. It seemed like play for them to handle the hissing iron⁵⁸.

Through metaphors and similes technology becomes a part of nature and not something that disturbs the idyllic portrayal of the landscape. In the section

⁵⁵ E.G. Ingersoll, *Representations of science and technology in British literature since 1880*, New York, Peter Lang, 1992, p. 2; L. Marx, *The machine in the garden: technology and the pastoral ideal in America*, New York, Oxford University Press, 1964.

⁵⁶ Lagerlöf, *The Wonderful Adventures of Nils*, cit., p. 196.

⁵⁷ Lagerlöf, *Nils Holgerssons underbara resa genom Sverige. Bd 2*, cit., p. 499 (our translation).

⁵⁸ Lagerlöf, *The Wonderful Adventures of Nils*, cit., p. 347.

where Nils passes over the railway station technology is even brought to life in an anthropomorphic way:

The station master stood on the platform with his red flag, and moved slowly toward the train.

When he waved his little flag, the locomotive belched even darker smoke curls than before, and whistled mournfully because it had to stand still. All of a sudden it began to move toward the south, like everything else⁵⁹.

2. Concluding Discussion

The educational ideas of *The Wonderful Adventures of Nils* are progressive, focusing the integration of knowledge rather than each knowledge domain by itself and for the children of the time to learn about the nation of Sweden by experiencing it. Lagerroth writes: «The difference between *The Wonderful Adventures of Nils* and textbooks [...] of a traditional kind is that the landscape in [...] Nils is experienced while that in the usual textbooks is understood»⁶⁰. It is interesting that Nils' moral development mainly happens as he discovers all the wonderful inventions and technologies that humans have created, which also becomes an example for the children who read the book. Nils includes passages about technological artefacts and systems of different kinds – axes, knives, nails, locks, needles, kettles, rifles, mines, ironworks, sawmills, factories, railways, etc. – and when meeting Father Bear, Nils and the readers are introduced to the processes of the iron industry in detail. Older, and for the readers probably familiar, technology from the agricultural sector is interspersed with new technology connected to the industries and modern society. But even though industrialisation is a major motif cities do not dominate the narrative since in Sweden industries were initially located in the countryside. Through metaphors the old and new are linked together and industrialisation is portrayed as a development of agriculture and not as a threatening competitor. Meanwhile a thread of nostalgia also runs through the story. Throughout the book views of technology, society and nature are seamlessly integrated in the educational story, so as to form a narrative of the nation.

Frängsmyr has studied images of the future and utopian visions in Western thought during the 19th century⁶¹. He describes a polarisation between what he calls the effective society and the good life, the former being an Enlightenment

⁵⁹ *Ibid.*, p. 459.

⁶⁰ E. Lagerroth, *Landskap och natur i Gösta Berglings saga och Nils Holgersson*, Uppsala, Almqvist & Wiksell, 1958, p. VII-VIII (our translation).

⁶¹ Frängsmyr, *Framsteg eller förfall: Framtidsbilder och utopier i västerländsk tanketradition*, cit.

ideal with a strong belief in technology, societal progress and of subduing nature while the latter is rather a utopian Romanticist idea of harmony with nature. The views expressed in Nils seem to have included items that reminded of both a belief in progress and a utopian vision, celebrated technological development and rule over nature while at the same time wanting adaptation to nature⁶². It is a bit surprising that few scholars have picked up this ambiguity and ambivalence in *The Wonderful Adventures of Nils*, Erlandson-Hammargren being an exception⁶³. He certainly agrees that an instrumental view of nature lies behind the description of the Swedish woodland. On the other hand, he points to other parts of the book where there is criticism against devastation of forestland. Other examples of a view that advocates adaptation to nature are the description of the polluted and dead lake Tisken and the part about lake Tåkern⁶⁴. This ambiguity about industrial and technological development is not surprising because there was in fact growing concern about pollution from industries and urban sewer systems, criticism toward modernisation as well as an incipient nature protection movement at the turn of the century 1900, in Sweden as well as in other Western countries⁶⁵.

The nationalist sentiment is very evident in *The Wonderful Adventures of Nils*, for instance, in the ways that nature is portrayed. First of all, since Nils is flying on a goose's back through practically the whole country he also shows the readers what the country looks like and where its borders lie. Secondly, the national landscape with all its variety almost becomes a national trait – the varied natural and cultural landscapes underneath Nils is Sweden. Thirdly, nature is seen as a resource for industrial and thereby societal development, and certain resources such as iron ore are portrayed as specifically Swedish⁶⁶. Technology occupies a very central place in this description of the nation. Communications technologies connect the various parts of Sweden, particularly in bringing the natural resources of Norrland to practical use for industrialising and developing the whole nation. Human inventiveness is a significant asset in this regard; industrialisation, improvement of public services with technology,

⁶² *Ibid.*, pp. 234-236.

⁶³ Erlandson-Hammargren, *Från alpromantik till hembygdsromantik. Natursyn i Sverige från 1885 till 1915, speglad i Svenska Turistföreningens årsskrifter och Nils Holgerssons underbara resa genom Sverige*, cit.

⁶⁴ *Ibid.*

⁶⁵ J. Hallström, *Constructing a Pipe-Bound City: A History of Water Supply, Sewerage, and Excreta Removal in Norrköping and Linköping, Sweden, 1860-1910*, Diss., Linköping, Dept. of Water and Environmental Studies, Linköping University, 2002; M. Stolare, *Kultur & natur. Moderniseringskritiska rörelser i Sverige 1900-1920*, Göteborg, Göteborg University, 2003; D. Worster, *Nature's Economy: A History of Ecological Ideas*, Cambridge, Cambridge University Press, 1994.

⁶⁶ Nordlund, *Det upphöjda landet. Vetenskapen, landhöjningsfrågan och kartläggningen av Sveriges förflutna, 1860-1930*, cit., pp. 260-279.

and the bringing of jobs to rich and poor alike all depend on (technological) ingenuity⁶⁷.

This incorporation of industry and technology into a positive narrative of the nation is important given the fact that especially conservative groups saw big business and industry as threats to the nation and their own power base, while social democrats blamed capitalism and thereby indirectly industrialism for evils detrimental to the nation such as import of foreign labour, the extensive emigration to America, and social inequality in general⁶⁸. The great contribution of *The Wonderful Adventures of Nils* in this regard was to reconcile the nationalism of the political right and left, which was probably why it was so successful as a novel as well as educational children's book in the school.

In conclusion, in *The Wonderful Adventures of Nils* technology and human settlements are natural elements of the various landscapes of Sweden, thereby making them as much a part of building a national identity around the physical environment as woods, plains, lakes, animals and plants. The message of the book seems to be that technology is interwoven with society and nature in the formation of modern Sweden. It is impossible to describe the nation and impart nationalism in children without also incorporating technology; it is a human creation and as much a force in shaping the nation as other human endeavours and nature.

Finally, the story of *The Wonderful Adventures of Nils* can be summed up by what Nils notes from Gorgo's, the eagle, back: «It is a great country that we have! Wherever I go, there is always something new for people to live upon»⁶⁹.

⁶⁷ Cf. C. Mitcham, *Thinking through Technology. The Path between Engineering and Philosophy*, Chicago and London, The University of Chicago Press, 1994. Mitcham's concept of *volition* acknowledges the important role that human will, ingenuity and creativity play in technological development. In his four-fold description of the dimensions of technology, even technology as *knowledge, activity* and *object* permeate the narrative of *The Wonderful Adventures of Nils*. See Axell, *Barnlitteraturens tekniklandskap. En didaktisk vandring från Nils Holgersson till Pettson och Findus*, cit.

⁶⁸ C. Strahl, *Nationalism & socialism. Fosterlandet i den politiska idédebatten i Sverige 1890-1914*, Diss., Lund, Lund University, Dept. of History, 1983, pp. 156-165.

⁶⁹ Lagerlöf, *The Wonderful Adventures of Nils*, cit., p. 445.

National character of the Educational Reform Movement in Slovakia in the interwar period*

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ABSTRACT: In the years 1918-1939 in Czechoslovakia the educational reform movement was developed mainly in the Czech Republic. After the collapse of Austria-Hungarian Monarchy and due to strong Magyarization, education and training in Slovakia were in bad situation. Under the influence of the protagonists of the reform movement in the Czech Republic, for example Václav Příhoda, Ludmila Žofková, František Musil, inspirations of educational reform movement began to develop in Slovakia, too. Its most important centre was the city Trnava. The arrival of Musil in 1931 marked the beginning of organized education of teachers, which acquired the official status of *Trnava Education Seminar* in the year 1934 and together with the journal *Our School* considerably influenced teachers in the Trnava region and in other parts of Slovakia, too. The journal gradually became the platform of Slovak reform teachers. The aim of this article is to find out, how the educational reform movement influenced national identity.

EET-TEE KEYWORDS: Nationalism; Civics; Educational Reform; Education System; Slovakia; XX Century.

1. *Specific situation in education in Slovakia after origination of the Czechoslovak Republic in 1918*

The dissolution of the Austrian-Hungarian Monarchy and the origination of the Czechoslovak Republic (CSR) is the key event in the development

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of Slovak nation in the modern Slovak history. For the first time in history Slovakia became an administrative unit with its own territory and a new history of Slovak statehood began¹. The new republic was created in difficult economic and social conditions, which were the remainder of WWI, on one hand and in new political conditions of the origination of CSR, which were accompanied by inexperience of political elites, on the other hand. Slovakia was largely an agrarian country in this period, 19.7% of the working population worked in industry and 64.3% worked in agriculture².

According to Škvarna³ the economic, social and political modernisation and national emancipation did not occur collaterally, as it did in the countries of the Western Europe, but asynchronously. Hungarians completed this process already in 1848-49, the Czechs and Croats formed modern nations in the 1860s. The Austro-Hungarian Compromise (1867) meant a negative interference into the process of national emancipation for Slovaks, who according to the above mentioned author, «came into a retardation phase»⁴. Strong magyarization in the second half of the 19th century and at the beginning of the 20th century disabled fulfilment of the primary role of education: to educate and to prepare new generations for individual areas of political, social and economic life. The development of the Slovak nation was slowed down and its shaping into a modern nation was completed only in the 1920s.

The specific situation in Slovak education in 1918 can be demonstrated on the following data:

- out of the total of 3641 primary schools only 140 were Slovak, there did not exist any Slovak secondary school or university⁵. Based on the above stated it can be concluded that there was practically no national education in Slovakia at all,
- the number of unschooled children in 1918 was estimated at 40-50 thousand⁶,
- in November 1918 the number of Slovak teachers at primary schools was 300 and at secondary schools about 20⁷, which represented an acute shortage of Slovak teachers,

¹ D. Kováč, *Rok 1918 – kontinuita a diskontinuita v slovenskom národnom programe* [1918: continuity and discontinuity in the Slovak National Programme], in V. Bystrický, D. Kováč, J. Pešek *et al.* (edd.), *Kľúčové problémy moderných slovenských dejín* [The key problems of modern Slovak history], Bratislava, VEDA, 2012, pp. 136-154.

² In the Czech lands 38.9% of the working population worked in industry and 42.9% in agriculture in the same period (J. Svetoň, *Obyvateľstvo Slovenska za kapitalizmu* [The population of Slovakia in capitalism], Bratislava, Slovenské vydavateľstvo politickej literatúry, 1958, p. 82.

³ O. Škvarna, *Logika a kontext utvárania moderného slovenského národa* [Logic and context of creation of the modern Slovak nation], in Bystrický, Kováč, Pešek *et al.* (edd.), *Kľúčové problémy moderných slovenských dejín* [The key problems of modern Slovak history], cit., pp. 13-38.

⁴ *Ibid.*, p. 38.

⁵ *Slovenské školstvo v prítomnosti* [The current Slovak education], 1932, pp. 11, 30.

⁶ *Ibid.*, p. 10.

⁷ J. Mátej, *Školstvo, výchova a pedagogika v buržoáznej Československej republike (1918-*

- religious schools were well represented in Slovakia: in 1917/18 there was 74.5% religious schools out of all schools in the Slovak territory, 21.8% state schools, 3% public schools (orig. *obecné školy*), 0.7% private and federal schools⁸,
- shortage of Slovak textbooks at all levels of education,
- there did not exist any scientific-educational workplace.

The biggest problem was a missing generation of Slovak pedagogues and educational institutions, in which educational science could develop and new generations of teachers could be prepared. There was a lack of quality educational journals, too, which would provide the space for presentation of opinions and educational discussion. Actually, there was no one in Slovakia who would catch up with the qualitative shift in the development of education in the second half of the 19th century. In the last third of the 19th century Slovak intellectuals and teachers dealt with the issue of preserving Slovak language and Slovak education at all. They worked mostly multifunctionally, in several areas, often holding political functions, either in regional or higher politics. According to Mátej⁹, in the first decade of the existence of Czechoslovakia, Slovak pedagogy had not reached the level it did in the second half of the 19th century.

2. School Policy and the System of Education in Slovakia in the First Years of the Czechoslovak Republic

The Ministry of Education and National Awareness (MENA) based in Prague became the central governing authority in the field of education in Czechoslovakia after 1918. A subordinated Department of Education (orig. *Školský referát*) of MENA based in Bratislava was established in Slovakia according to Act No. 64/1918. It was the first institution that managed education in Slovakia ever. School inspectorates established in individual districts, which were subordinated to the Bratislava based Department of Education, played an important role in managing education in the interwar period. Among its fundamental tasks after 1918 was «slovakisation of the existing school system, disposal of illiteracy, establishment of Slovak schools of all levels focusing on

1939), *časť Slovensko* [The Education system, education and education science in the bourgeois Czechoslovak Republic, 1918-1939, part Slovakia], in J. Mátej (ed.), *Dejiny českej a slovenskej pedagogiky* [The history of Czech and Slovak education], Bratislava, SPN, 1976, pp. 343-370.

⁸ J. Čečetka, *Průručný pedagogický lexikon 1. a 2.* [The handy educational lexicon part 1. and part 2.], Turčiansky sv. Martin, Kompas, 1943, p. 257.

⁹ Mátej, *Školstvo, výchova a pedagogika v buržoáznej Československej republike (1918-1939), časť Slovensko* [The Education system, education and education science in the bourgeois Czechoslovak Republic, 1918-1939, part Slovakia], cit.

primary education and unification of different school system in Czech lands and Slovakia»¹⁰. Implementation of Slovak language as the language of schooling into all levels and types of schools was connected to the training of qualified Slovak teachers for all levels of schools. Already at the end of WWI there was a shortage of teachers in Slovakia, especially due to magyarization, another reason was the state of war, when many Slovak teachers had to enlist. After origination of CSR the situation even worsened, since the teachers of Hungarian nationality had to take an oath of allegiance to the Czechoslovak state¹¹ otherwise they could not teach. These were the reasons of an acute shortage of teachers at all levels of schools. The situation could not have been treated differently than by the assistance of Czech teachers. In a message from 19th August 1919, which was sent by Anton Štefánek, the official for education in Slovakia, to Vavro Šrobár, the minister plenipotentiary for administration of Slovakia, it is stated that it was necessary to fill at least 1000 teacher posts and 300 to 400 professor posts at secondary schools and vocational schools by Czechs¹². The placement of Czech teachers was carried out by the Department of Education based in Bratislava starting on 30th June 1920. A specific situation occurred in Slovakia, when after the devastating magyarization, Slovakia was not able to provide establishment of national education on its own and the assistance of Czech teachers was inevitable. According to the census in 1921, 4283 Slovaks, 1423 Czechs, 2290 Hungarians, 508 Germans, 173 Rusyns and 316 Jews worked in education¹³. It demonstrates that the proportion of Slovak educators was less than half (48%) considering the overall number. The number of Czech teachers was gradually growing as 1400 were requested; however, the number of new graduates of Slovak teacher training institutes was increasing, too.

This situation in education reflected a complicated national situation in Slovakia after the origination of CSR. The overall population of Slovakia counted 3 000 870 inhabitants¹⁴, 1 952 368 inhabitants of Slovak nationality and 650 597 inhabitants reporting Hungarian nationality¹⁵, which represents one third in comparison to Slovaks. Regarding the situation in education they

¹⁰ E. Kázmerová, *Premeny v školstve a vzdelávaní na Slovensku (1918-1945)* [Transformations in school system and education in Slovakia, 1918-1945], Bratislava, Prodama, 2012, p. 12.

¹¹ Government regulation No. 495 from 28th August 1919 Oath of a Public School and Primary School Teacher (orig. Prísaha učiteľa obecných a ľudových škôl).

¹² National Archives of the Czech Republic, Prague, collection MŠaNO, file no. 311.

¹³ Kázmerová, *Premeny v školstve a vzdelávaní na Slovensku (1918-1945)* [Transformations in school system and education in Slovakia, 1918-1945], cit., p. 16.

¹⁴ «By 1930 the number of inhabitants increased by 11% thanks to a high rate of reproduction and reduced emigration. The proportion of inhabitants of Slovak nationality within the total number of inhabitants increased by 15.3%. The number of inhabitants of Hungarian nationality decreased by 10.0%. An extraordinary increase was observed in Czech entity – by 67.5% to 121 696 inhabitants» (V. Srb, *Obyvatelstvo Slovenska 1918-1938* [Population in Slovakia 1918-1938], Bratislava, Infostat, 2012, p. 10, <<http://www.infostat.sk/vdc/pdf/slov1918.pdf>> (accessed: September 6, 2014).

¹⁵ Srb, *Obyvatelstvo Slovenska 1918-1938* [Population in Slovakia 1918-1938], cit., p. 10.

found themselves in an extraordinarily favourable position after the period of strong magyarisation of the final third of the 19th century and at the beginning of the 20th century. The situation of their education in CSR was supposed to mirror their representation in the population and the previous privileges were supposed to be reconsidered. Furthermore, there was a German minority living in Slovakia counting 145 844 inhabitants, Russian minority counting 88 970 inhabitants (including Ukrainian, Ruthenian and Carpathian nationality), who were being educated in their mother tongues. A relatively large Jewish minority lived in Slovakia, too, counting 73 628 inhabitants. The position of Jews in Catholic Slovakia was complicated – on one hand, they felt like members of the Slovak society, however, they identified themselves with Jewish religious and cultural tradition more frequently. In order to complete the picture, the rest of the data is stated. The population of Czech nationality was 72 635 in 1921, Polish nationality 6059 and Romanian 588; other nations represented together 10 181 inhabitants¹⁶. Under the Hungarian legal Act No. XXXVIII from 1868 the structure of the system of education in Slovakia was by 1918 designed as follows:

1. Nursery schools for children aged 3-6 (orig. *detské opatrovne*),
2. Primary schools compulsory for children aged 6-12, they encompassed six years (in 1918 the structure of primary schools in Slovakia, divided according to a founder, was as follows: 801 state schools, 105 public, 23 private, 1622 Roman-Catholic, 304 Greek-Catholic, 467 Evangelic, 261 Evangelical Reformed and 77 Jewish schools¹⁷),
3. Higher primary schools founded by municipalities having over 500 inhabitants; three-year-long education for boys, two-year-long education for girls. However, higher primary schools did not take hold much in practical life.
4. Burgher schools (orig. *meštianske školy*), whose length also depended on the gender: six-year-long education for boys and four-year-long education for girls. After finishing the fourth year at primary school or after passing entrance exams the pupils were accepted to a burgher school (in 1918 there were 41 state burgher schools, 10 public ones, 5 private ones, 15 Roman-Catholic schools, 1 Greek-Catholic, 7 Evangelic ones and 4 Jewish schools¹⁸),
5. Teacher training institutes: three-year-long for teachers for primary school, which were followed by specialised courses; after attending those, specialised examinations were taken and these entitled them to teach at burgher school and higher schools.

¹⁶ *Ibid.*

¹⁷ *Slovenské školstvo v prítomnosti* [The current Slovak education], 1932, p. 11.

¹⁸ *Ibid.*, p. 17.

After finishing the 5th year of primary school (aged 11), the pupils could continue in higher years of primary school (6th-8th year) or to enrol in the 1st year of burgher school and after graduating, they could continue their studies at secondary, vocational or apprentice school. Pupils who were interested in future university studies, attended 8-year-long grammar schools after they completed the 5th year of primary school. Grammar schools were the only way of preparation for university studies. Until 1918, based on the legal article No. XXX from 1883, there were eight-year-long grammar schools and eight-year-long real/secondary schools (orig. *reálky*) in the territory of Hungary. In 1919 the Czechoslovak State University was founded in Bratislava and in the same year its name was changed to Comenius University. It was the first university institution in the modern Slovak history where the first Slovak professors taught.

The Act No. 226 Coll. from 1922, so called *Little School Act*, was the key act in the field of primary and burgher schools. The act implemented eight-year-long compulsory school attendance up to the age 14 in the entire Czechoslovakia (by then, there was eight-year-long compulsory attendance in the Czech lands and six-year-long compulsory attendance in Slovakia). However, it did not deal with the issue of existence of two types of schools in the second grade or with the issue of higher education. The act acknowledged the equality of male and female teachers and co-education of pupils. Teaching plans were extended to three new subjects: civic education, domestic education for girls and handicraft education for boys. Religious education remained in the teaching plan; however, parents had the opportunity to unsubscribe their child. Concerning the unification of compulsory school attendance from six to eight years, the regulation started to be implemented in Slovakia in the school year 1927/28 under the Decree of MENA No. 4530-I. from 26th April 1927. The cause of backwardness of the implementation of the Little School Act in Slovakia is according to Kázmerová (2012) based on the prevailing socio-political and economic conditions. It was not possible to provide for e.g. school premises, higher number of teachers, new textbooks and teaching aids, since it would mean a great financial burden for the state budget. Besides, an opinion prevailed in Slovakia that Slovak burgher schools, being the legacy of the Hungarian school system, had higher level than the three-year-long Czech burgher schools. The implementation of a unified system of three-year-long burgher schools in Slovakia meant the loss of the opportunity to continue in study at a secondary school with «Maturita» exam¹⁹.

Regarding the issue of the relationship between burgher school and lower secondary school, some proposals for alternation of this bifurcate matter appeared already at the beginnings of the Czechoslovak republic, e.g. at the negotiations of the 1st Congress of *Czechoslovak Teacher Community* (orig.

¹⁹ *Maturita* is school leaving exam for the upper secondary education. The Ministry of Education tried to compensate the loss of one year by creating one-year-long tuition courses which were supposed to make up for the cancelled fourth year, however, this proposition did not take hold in practice.

Československá obec učitel'ská) in Prague in 1920. The participants of the congress expressed themselves in favour of a unified school, where the pupils should be differentiated according to their talents so that leveling was prevented. These two lines led to discussions on *unified differential school* (orig. *jednotná diferencovaná škola*). Since the state did not react to the requests of teachers and postponed the solution of key issues, they decided to develop their own reform efforts. According to Pánková, Kasperová and Kasper²⁰ «Czechoslovak Teacher Community proved an extraordinary activity and capacity for action». However, in 1924 the community broke up and in opposition to it the *Union of Czechoslovak Teachers* (orig. *Zváz československého učitel'stva*) was established, which had more members and primary school teachers were the most populous. In 1921 a self-help teacher organisation School of Higher Pedagogical Studies (orig. *Škola vysokých štúdií pedagogických*) originated, whose main aim was to help teachers in their effort for university education that the state did not deal with. The workplace was led by professor Otakar Kádner. Besides the support of activities of teachers the School of Higher Pedagogical Studies became the second important point in the development of reform pedagogy. The *Institute of Experimental Pedagogy* (orig. *Ústav pre experimentálnu pedagogiku*) originated there²¹. The ideas of a unified differential school were promoted by several Czech pedagogues-theoreticians: e.g. František Drtina (1861-1925) demanded a reform of secondary schools and synthesis of education, Josef Úlehla (1852-1933) expressed himself in favour of a unified primary and secondary school, Otakar Chlup (1875-1965) requires the so called comprehensive education. Czechoslovak teachers and the scientific pedagogical elite promoted the reform mainly in two areas: school reform on one hand and the reform of university education of teachers on the other. However, MENA did not resolve to a systematic and conceptual reform in neither of the mentioned areas in the first decade of the existence of CSR.

²⁰ M. Pánková, D. Kasperová, T. Kasper, *Meziválečná školská "příhodovská" reforma – roviny zkoumání a metodologická východiska* [Interwar school "Příhoda" reform – plane exploration and methodological issues], in M. Pánková, D. Kasperová, T. Kasper (edd.), *Meziválečná školská reforma v Československu* [Interwar school reform in Czechoslovakia], Praha, Academia, 2015, pp. 6-17.

²¹ In 1921 Pedagogical School was established in Brno, whose aim was, similarly as in Prague, to educate teachers. In 1922 it was taken over by the School of Higher Pedagogical Studies in Prague and it became its branch and the Institute of Experimental Pedagogy, led by Otakar Chlup, was established there the same year.

3. *Beginnings of the Educational Reform Movement in the Czech Lands and Slovakia*

1928 was the year of the tenth anniversary of the young state and it was also the year of evaluation of results of the first decade of its existence. President Masaryk dealt also with education and training in his speech that he delivered on the day of the anniversary of the Czechoslovak Republic origination (28th October). He recalled the tradition of Comenius and expressed concern about the slow speed of the educational reform. Discussions on the unified differential school were revived once again. In 1928 the School of Higher Pedagogical Studies organized *Pedagogical Week*²². *Commission for the Reform of National School* was established the same year in the same institution and led Václav Příhoda²³. Its aim was elaboration of curriculum and teaching plans of unified differential school. The proposition for the unified differential school was published by Příhoda in his paper *Jednotná škola. Její možnosti dnes a zítra* in the journal *Školské reformy* in 1928. The practical implementation of the reform plan was carried out in the school year 1929/1930. However, the Ministry of Education allowed only verification of pilot differential burgher schools, not primary schools. In the Czech Republic, under the terms of the authorisation decree, there were three pilot burgher schools established in Prague (Michle, Nusle and Hostivař), one in Humpolec and one in Zlín²⁴. These schools followed the plan of the reform commission of the School of Higher Pedagogical Studies in Prague. The fundamental unity in pilot schools was the differential unity. Such a school was supposed to have three departments with maximum, medium and minimum difficulty so that pupils could move within them flexibly according to their abilities. Regarding the form of classes, it was a combination of

²² The Pedagogical Week was held from 27th October to 4th November. It dealt with two basic questions. The first question was the issue of the unified differential school and the second question the issue of university education of teachers. The assemblage of teachers adopted a resolution that states, «We manifest for a unified differential school for all the youth up to the age of 15... A unified differential school is a two-grade school. The first grade is comprised of the first five years of consolidated primary school. Consolidation means uniting half-organised schools (mixed year classes) into fully-organised schools (same age classes). The second grade will be a union and transformation of the current burgher school and lower secondary school into a new type of a differential unified school of the second grade. Differential stands for differentiating among methods and teaching materials according to individual differences in intelligence, interests and needs of pupils» (*Pedagogických ruch let 1924-1930, 1933*).

²³ Václav Příhoda (1889-1979) was a supporter of educational positivism and the main inspirer of the educational reform movement in the Czech lands. He was influenced by his two study stays in the USA, where he met the then renowned pedagogues and psychologists (influenced the most by E. L. Thorndike and J. Dewey, whose lectures he attended) and a stay in Switzerland (there he met E. Claparede, P. Bovet, A. Ferreira as well as young J. Piaget). Mátej (1976) emphasizes the fact that Příhoda published – in Slovakia and in Slovak language – his notable work *Reformné hľadiská v didaktike* (1934), which is a pendant to his *Racionalizácia školstva* (in Czech in 1930).

²⁴ Pilot school in Zlín, which was supported by Tomáš Baťa, was different to the ordinary pilot schools.

individual work of pupils, which was supposed to lead them toward autonomy, and collective work, which was supposed to lead them towards involvement in joint matters (e.g. through pupils' board and regular pupils' assemblage). The reform proposal was gradually being adjusted in accordance with the solution of some problems of educational practice. Příhoda managed to gain lots of teachers and a wide circle of cooperators for the ideas of the reform. He published many papers and delivered lots of lectures on clarification and defence of the reform. The overall conception of the reform was clarified in the publication *Racionalizácia školstva* (1930). In contrast to the previously established school philosophy, according to which a child had to adapt to the level of education, the reform school adjusts to the individuality of a pupil (Příhoda, 1930). Other principles included: activity of a pupil replacing static nature; selection of content according to its applicability in life replacing the quantity of encyclopaedic knowledge; employment of pupil's abilities while solving the given task replacing lots of useless knowledge. According to Kasper and Kasperová²⁵ «uniformity and stereotype were to be replaced by flexibility and individual approach» in pilot schools.

Ideas of the educational reform movement and the idea of unified differential school were implemented in Slovakia with a certain delay in comparison to the Czech lands. They were spread mainly through journals of education and other specialised sources of literature, through personal contacts with Czech reform teachers (many of whom were based in Slovakia), later on through excursions and visits to Czech pilot schools and through participation in meetings of reform teachers. The first pilot schools in Slovakia were established three years later than in the Czech lands, i.e. in 1932/33. Pilot burgher schools were established in Trnava, Malacky (western Slovakia), where the centre of the reform movement was the city of Trnava and in Michalovce in the eastern Slovakia, where the centre of the reform movement were the cities Prešov and Košice²⁶. Among the first pilot schools was the State burgher school for boys in Trnava, where the methods of individualisation, differentiation and autonomous learning were introduced in 1932/33. Instead of traditional classrooms specialised classrooms for individual subjects were established. Differentiation took place at first according to marks, which actually did not prove useful and therefore, starting in 1935/36 another criterion for pupils' differentiation²⁷ was applied – differentiation according to their interests²⁸. Another pilot school in the western Slovakia was the Burgher

²⁵ T. Kasper, D. Kasperová, *Dějiny pedagogiky* [History of education], Praha, Grada, 2008, p. 208.

²⁶ E. Lukáč, *Reformné pedagogické hnutie ako špecifická paradigma v činnosti učiteľov na Slovensku v období 1. ČSR* [Educational reform movement as a specific paradigm in teachers work in Slovakia during the 1st Czechoslovakia], «e-Pedagogium», n. 3, 2012, pp. 57-60.

²⁷ State District Archives Trnava, collection ŠI Trnava, file no. 50, box no. 31.

²⁸ Before the beginning of the school year pupils of the 1st and 2nd year were offered activities like violin, choral recitation, choral singing, drama, German language, modeling, scouting,

school of Dr. Ivan Dérer in Malacky. In 1935 all classrooms in the school were pilot classrooms. One of the means of education toward a collective was a school magazine *Naše hlasy* (*Our Voices*), whose publication was provided by pupils themselves²⁹. The collective of pupils had an important role also in sanctioning some of offenses in a class (e.g. reprimanding, loss of the right to vote, ban on participation in team games, etc.). The sanctions were announced at pupils' assemblages.

According to Kasperová it is typical for the phenomenon of educational reform movement to have individual conceptions «closely bound to their founders, to the significant, charismatic pedagogues who proposed the conception and implemented it later in pilot or reform schools»³⁰. It is not any different in the Slovak environment either. Even though the inspirations followed the Czech model of Příhoda reform, Czech teachers teaching in Slovakia as well as Slovak teachers in the pilot schools carried the reform out in a different socio-political context and left their specific imprints on it.

4. Key Elements of the Educational Reform Movement in Slovakia (*Trnava Seminar of Education, Naša škola Journal*)

According to Miklovič (1969) Příhoda was the idea leader and organiser of the school reform nationwide. His most consistent helper in Slovakia was a Czech teacher František Musil (1893-1969), who was Příhoda's pupil. In Slovakia, he worked in Teachers' Institute in Bratislava (1921-1931) at first and later as a school inspector in the School Inspectorate in Trnava (1931-1938)³¹, Already during his time in Bratislava he became the chairman of the editorial board of the journal *Naša škola* (*Our School*) (since 1929), which influenced thinking and profiling of Slovak reform teachers significantly. After his arrival to Trnava he even multiplied his activities³², as a result, Trnava and the region of Trnava

physical education activities, geography, which were held once a week in two lessons. In the 3rd and 4th year the pupils chose one of the facultative courses (French or English language) which they combined either with an optional course (stenography) or one of the extensional courses (biology, drawing, physics, measuring).

²⁹ J. Špánik, *Prvá pokusná škola slovenská* [The first Slovak pilot school], «Pedagogický zborník», n. 5-6, 1935a, pp. 167-173.

³⁰ D. Kasperová, *Otvorenosť a uzavrenosť reformného pedagogického hnutia* [Openness and closeness of educational reform movement], in T. Kasper (ed.), *Reformní a alternativní aspekty vzdělávání – historické kontexty a současné příklady* [Reform and Alternatives aspects of education – historical context and contemporary examples], Liberec, Technická univerzita, 2012, pp. 18-26.

³¹ State District Archives Trnava, collection ŠI Trnava, file no. 109, box no. 79.

³² Before Musil's arrival, a Czech teacher Ludmila Žofková worked in the region of Trnava; she taught in Modra in 1923-27 and practised differential classes of geography, history and Slovak language (Lukáč, *Reformné pedagogické hnutie ako špecifická paradigma v činnosti učiteľov na Slovensku v období 1. ČSR* [Educational reform movement as a specific paradigm in teachers

became the centre of the educational reform movement in Slovakia. Since he worked as a school inspector, he had the necessary competences and possibilities to promote the conception of the unified differential school. During his time in Slovakia, Musil published *Prejavy. Pokus o celistvé vyučovanie a výchovu prejavovú v prvom školskom roku I. a II.* (1927), a methodology handbook for teachers *Čítanie globálnou metódou* (1930) and handbooks for primary science *Prax na nižšom stupni I. a II.* (1937). In his personal file at the State District Archives Trnava I found certificates for the functions he was assigned with and performed in Slovakia and certificates for assessment of textbooks and publications³³. Musil can be considered the most significant pioneer of reform education in Slovakia³⁴. His name is associated with the establishment of Trnava Seminar of Education (1934) and the journal *Naša škola*, which were the platform for spreading the thoughts of the educational reform movement in Slovakia and fundamental pillars in creating of the philosophy of the reform school in Slovakia.

Since 1926 to 1939 the journal *Naša škola* was issued monthly and consisted of 32 pages. In the editorial of the first issue it can be found that it wants to become «a faithful, impartial and reliable assistant to all teachers in Slovakia, regardless of the character of the school»³⁵. Martin Ježo and Rudolf Kratochvíl were the editors in chief of the journal in the first four years of its existence and after them it was František Musil. The journal became a platform for the supporters of the educational reform movement under Musil's leadership and it stirred lively educational activity, which was gradually freeing itself from the strong national-emancipative spirit. The content orientation of contributions may serve for observation of the development of Slovak reform movement and its protagonists. From the perspective of time, the content of the journal was profiled in three phases. In the first phase it focused on papers presenting information on reform movement worldwide and in the Czech lands in particular, whose authors were mainly Czech teachers from pilot schools; in the second phase it focused on papers on the needs of Slovak national school, whose authors were both Czech and Slovak teachers; and in the third phase (mid 1930s) it were predominantly papers published by Slovak reform pedagogues on their own practical attempts and experiences. *Pedagogická encyklopédia Slovenska I.* evaluates the journal as follows: «In comparison to the journals of religious school teachers it reached higher level also due to the credit of

work in Slovakia during the 1st Czechoslovakia], cit.).

³³ The personal file of Musil provides only a few documents that would be relevant from the perspective of the educational reform movement in Slovakia.

³⁴ B. Kudláčová, *Trnava a trnavský región – centrum reformného pedagogického hnutia na Slovensku* [Trnava and Trnava region – center of educational reform movement in Slovakia], in M. Pánková, D. Kasperová, T. Kasper (edd.), *Meziválečná školská reforma v Československu* [Interwar school reform in Czechoslovakia], Praha, Academia, 2015, pp. 169-177.

³⁵ *Editorial*, «Naša škola», n. 1, 1926, p. 1.

prominent university pedagogues (O. Chlup, J. Tvrđý, V. Příhoda, J. Uher and others)»³⁶. As a result of the rise of nationalist-oriented political forces in Slovakia in 1939 and the subsequent WWII the existence of the journal was interrupted; its renewal after the war did not take place. The journal is a valuable source for analysis of the development of the educational reform movement in Slovakia.

In September 1934 Musil established *Trnava Seminar of Education*³⁷, which was a voluntary association of teachers and supporters of the educational reform movement in the region of Trnava. Its aim was broadening theoretical and practical knowledge in individual fields of reform education. The association did not have an institutionalised form, but it had a great importance in shaping reform teachers and disseminating information. A. Řezanin, a headmaster at a pilot burgher school for boys in Trnava, became the first chairman of Trnava Seminar of Education³⁸. Trnava Seminar of Education existed for four school years, up to 1937/38. Its specific activity was organising lectures aimed at reform movements in education, excursions to pilot schools in the Czech lands, organising practical courses, provision of information on the latest pedagogical literature, engaging teachers in research activities, etc. Lecturing activities and excursions can be considered the two most important areas of shaping the teachers.

In the period of the existence of Trnava Seminar of Education a relatively systematic non-formal education of reform teachers and the greatest advancement of educational reform ideas can be observed. Musil organised workshops for teachers every two months, whose content was, for instance, the issue of global method of writing and reading in the 1st year, group form of teaching, the issue of fine arts education and physical education, the issue of orthography and analysis of its deficiencies, etc. Workshops were carried out on a voluntary basis and even teachers outside the region of Trnava attended them. According to Brřková³⁹ 75 teachers attended the workshops on average. Sections for Slovak language, sums, globalisation, drawing, biology, national history, geography, choral recitation, school film and national defence education (orig. *branná výchova*) were gradually created within the seminar.

Excursions to pilot schools, which were carried out in cooperation with the journal *Naša škola*, formed an important agenda of the seminar of education. Trnava teachers attended an excursion to Prague pilot schools in Nusle and Michle in 1932 and 1933, in 1935 an excursion to Zlín took place and in 1937

³⁶ O. Pavlík (ed.), *Pedagogická encyklopédia Slovenska I.* [Education Encyclopaedia of Slovakia, part 1], Bratislava, VEDA, 1984, p. 620.

³⁷ No documents related to the issue of Trnava Seminar of Education were found in the State District Archives Trnava.

³⁸ M. Brřková, *Vztah české reformnej pedagogiky ku Slovensku* [Czech Education Reform in relation to Slovakia], in *Česko-slovenské vzťahy v oblasti školství* [Czech-Slovak relations in education], Píerov, Muzeum Komenského v Píerove, 1994, pp. 41-48.

³⁹ *Ibid.*

to a pilot burgher school in Boskovice in Moravia. The seminar of education organised also one-day excursions to pilot schools in the district of Trnava (to the pilot burgher school in Trnava as well as to schools that did not have an official status of a pilot school, but schooling was carried out in a similar manner as in pilot schools, e.g. primary schools in Majcichov, Opoj, Báhoň, Dechtice).

Musil also organised the 1st congress of friends of the school reform in Slovakia that took place on 8th June 1935 in Trnava. 250 teachers participated⁴⁰. Plenary lecture was delivered by Václav Příhoda. A requirement of creation of a network of reform schools in Slovakia was formulated at the congress. It was attended by representatives from all parts of Slovakia; however, teachers from the western Slovakia were the most numerous. In 1937, under Musil's supervision, a nationwide conference of pilot school teachers took place in Trenčianske Teplice (27th-30th May). After the separation of Czechoslovakia into Bohemia and Moravia and the establishment of the Slovak State in 1938 Musil had to return back to the Czech lands.

5. Examples from Practice Proving the National Character of the Educational Reform Movement in Slovakia

In the following part of the paper two specific examples of implementation of the educational reform movement in the practice of Slovak schools in the interwar period are presented. Both examples are outcomes of archival research and were not published before. I was interested in comparison of Slovak and Czech environment, whether the implementation of ideas of the educational reform movement in Slovakia had its own specific features or whether it was identical with Czech environment. I also focused on the impact of the implementation on the process of creation of Slovak national identity.

5.1. Michal Kopčan, a Headmaster at Primary School in Majcichov and a State District Inspector in Trnava

Michal Kopčan (1885-1947) was after Musil the most significant figure and a promoter of the educational reform movement in Trnava region. He also took over the function of a school inspector after him. The person of Kopčan⁴¹

⁴⁰ J. Špánik, *Zjazd priateľov školskej reformy v Trnave* [Meeting friends of school reform in Trnava], «Pedagogický zborník», n. 4, 1935, pp. 140-141.

⁴¹ Michal Kopčan was born in 1885 in Horná Žďaňa (district Žiar n/Hronom). In 1906 he graduated from Teacher Institute in Kláštor pod Znievom. In 1906-1913 he worked as a teacher at a one-class Roman-Catholic school in Prochoť, later he taught at a Roman-Catholic school in Dolné Orešany for a period of less than a year. In October 1913 he attended a teacher trainer

is focused on because of two reasons: 1) there is little information about him in pedagogical literature, 2) several documents associated with Kopčan were found in the State District Archives Trnava and I also managed to obtain texts from a school chronicle of a Roman-Catholic school in Majcichov, where Kopčan taught.

Kopčan introduced lots of reform elements at the Roman-Catholic primary school in Majcichov, even though the school did not have an official status of a pilot school. He implemented variety of novelties already in the first year of his teaching, e.g. each teacher had to have a detailed outline of educational content and a timetable, he collected 1 Kčs from each pupil for the needs of pupils' and teachers' library, he led the children toward charitable feelings through collecting eggs for orphans in Kláštor pod Znievom⁴², he founded Sanitary Association, which later transformed into Red Cross⁴³, he introduced 7th year (until then only 6 years were attended), he introduced the so called repetition classes for weaker pupils that were held after regular classes or on Sunday (in school year 1926/27 the 8th and 9th year were included)⁴⁴, he introduced school trips (in 1924 to Bratislava and Devín, 1925 to Trenčín and to Skalka, 1926 and 1928 to Tatras, 1927 to Banská Bystrica)⁴⁵, he introduced the so called school saving bank, which was managed by the pupils themselves⁴⁶, he introduced teaching new subjects (handwork for girls, physical education and civic education), he introduced the so called «school puppet theatre», for which he wrote scripts⁴⁷. In Kopčan's personal file in the district archive I found a written application requiring independent timetable for his elementary class of 1933/34, which confirms that he applied new methods in teaching⁴⁸. He extended the method of global teaching not only in teacher institutes in Modra, Trnava and Bratislava, but also in many primary schools in Trnava surroundings. He implemented the methods of learning through playing to several subjects, he used several visual

course in Budapest and acquired professional qualification for training schools (State District Archives Trnava, collection ŠI Trnava, file no. 87, box no. 49). In the same year he was appointed a teacher trainer in the state training Teacher Institute in Levice, where he worked until 1919 (except 1914-18, when he participated in WWI). An unusual episode in his life occurred on 15th March 1919 when he was dismissed from the service in the teacher institute and he lived without any income until 15th March 1921. He noted this life episode also in a school chronicle where he states that he was dismissed because he did not speak Slovak language since he had studied in Budapest (*School chronicle of the Roman-Catholic primary school in Majcichov*, pp. 1-14). Subsequently, he taught at a state primary school in Gajare, which he left because he was not appointed to the function of a headmaster. He applied for the position of a headmaster at the Roman-Catholic primary school in Majcichov, where he was unanimously elected and he also won a competition for the position of an organist. He worked as a headmaster from 1923 to 1937, except for 1932.

⁴² *School Chronicle of Roman-Catholic primary school in Majcichov*, pp. 64, 68-69, 80, 90.

⁴³ *Ibid.*, pp. 68-69, 83.

⁴⁴ *Ibid.*, p. 69.

⁴⁵ *Ibid.*, pp. 39, 51, 65, 81, 72-73.

⁴⁶ *Ibid.*, p. 62.

⁴⁷ *Ibid.*, p. 105.

⁴⁸ State District Archives Trnava, collection ŠI Trnava, file no. 87, box no. 49.

teaching aids, mainly in science. The primary school in Majcichov was in its teaching-learning character very close to pilot schools and it can be underscored by the fact that in 1935 the school was visited by teachers from Topolčany district and Prievidza as a part of their excursion⁴⁹.

Kopčan's activity exceeded the framework of school and education; he was also active in the area of culture and education of public in Majcichov. He was an organist in the local church and composed religious songs by himself. His Christmas mass from 1925 has been preserved⁵⁰. His comprehensive artistic talent was also expressed in painting pictures, mainly aquarelles⁵¹. Besides, he founded amateur theatre assembly consisting of local youth⁵², he organised meetings of parents about education of children, civil rights and current economical issues⁵³; in winter time, when there was no work in the field, he organised *Ludový náukobeh* (*Folk teaching*) annually, where he delivered lectures on selected topics for parents of school children⁵⁴, he founded reading club entitled *Čítací a vzdelávací spolok Jána Palárika* (*Ján Palárik Association for Reading and Education*) (it had 45 members)⁵⁵, he founded girls' choir, which sang at public feasts⁵⁶, he founded twenty-four-member musical group, which he also led as a bandmaster⁵⁷. The municipality board did not always understand his initiatives rightly, which resulted in disagreements between him and the board. Therefore, Kopčan himself initiated disciplinary procedure led by district school inspector and ecclesiastical authorities, who concluded after all that «the complaints against him are completely unfounded»⁵⁸. Since the attacks against his person repeated continuously, Kopčan finally resigned on the office of school headmaster on 1st March 1932. However, the office was returned to him by ecclesiastical authorities in Trnava and he took charge on 1st August 1933 and led it until 1937⁵⁹. In 1938 he became a headmaster of the Burgher school in Trnava and a school inspector in Trnava. In April 1941 he retired, staying in Majcichov, where he also died on 20th May 1947. He is buried together with his wife Gizela and disciple Katarína Boboková (1912-

⁴⁹ *Ibid.*

⁵⁰ A. Račková, *Tradície a piesne z Majcichova* [Traditions and Songs of Majcichov], Majcichov, Obecný úrad, 2006.

⁵¹ M. Banáš, K. Horecký, M. Horecký, *Významný pedagóg Michal Kopčan, k 50. výročiu jeho smrti* [Significant teacher Michal Kopčan, the 50th anniversary of his death], in *Michal Kopčan, pedagóg, správca rímskokatolíckej ľudovej školy v Majcichove* [Michal Kopčan, teacher, administrator of Roman Catholic school in Majcichov], Žilina, Knížné centrum, 1997, pp. 1-4.

⁵² *School Chronicle of Roman-Catholic primary school in Majcichov*, pp. 34-35, 62, 113.

⁵³ *Ibid.*, p. 71.

⁵⁴ *Ibid.*, pp. 33-34, 49, 61, 79.

⁵⁵ *Ibid.*, p. 45.

⁵⁶ *Ibid.*, p. 83.

⁵⁷ *Ibid.*, pp. 68, 71, 83-84.

⁵⁸ *Ibid.*, p. 38.

⁵⁹ *Ibid.*, p. 116.

1953, married name Halušková), who was his colleague and follower⁶⁰. The following inscription can be found next to his name on his tombstone. *Michal Kopčan – Majcichov's administrator and organist, school inspector of Trnava district, pedagogue and enlightener of primary education.*

Regarding Kopčan's publication and editorial activity, he was an editor of the journal *Slovenská škola* (*Slovak School*), which was published from 1919 to 1921. He published in journals *Naša škola* (*Our School*) and *Slovenský učiteľ* (*Slovak Teacher*). His reform efforts can be also seen in his following works: geography textbook for primary schools *Zemepis republiky Československej* (Trnava, 1925), sums textbook for primary schools *Mladý počtár I.* (Praha, 1935) and *Mladý počtár II.* (Praha, 1936), methodical guide for teachers *Prax na nižšom stupni I., II.* (Praha-Prešov, 1937), local history textbook *Naša záhradka* (1936-41) and readers *Slovenské kvety II, IV, V* (Trnava, 1940-41), he is also a co-author of the publication *Grafické prejavy na nižšom stupni ľudových škôl* (Trnava, 1941). In his personal file in the District Archives in Trnava I found letters from the Ministry of Education that assigned him with assessment of several textbooks for primary schools. In 1926 he was appointed a member of a commission for elaboration of curriculum for primary schools in Slovakia by the School Department, MENA⁶¹. In 1940 he created a detailed curriculum for Slovak primary schools.

Considering Kopčan's activities it can be concluded that he had a share in shaping Slovak reform teachers; on one hand, in the period of being an administrator of the primary school in Majcichov and on the other hand, when he worked as a school inspector. Another significant factor that certifies that he shaped teachers is that he was engaged in the Seminar of Education in Trnava and a chairman of Okresná jednota Zemského učiteľského spolku Trnavského (District Fellowship of Provincial Teacher Community of Trnava). He was also a chairman of Pedagogical Department of The Association of Saint Adalbert in Trnava. Throughout the whole interwar period he was involved in the area of shaping national and civic identity in Majcichov and the region in Trnava through his rich cultural and educational activities.

5.2. «The Hidden» Pilot School in Opoj

Based on the archival research I conducted it can be concluded that besides official pilot schools in Trnava surroundings there existed several pilot schools that did not have the official status of a pilot school. However, methods of teaching and approach to pupils at these schools are in accordance with the

⁶⁰ Katarína Boboková (Halušková) was a teacher at the Roman-Catholic primary school in Majcichov, a co-author of several Kopčan's works, e.g. biology textbooks for 5th to 8th year. She dealt mainly with the issue of Slovak language teaching.

⁶¹ *School chronicle of the Roman-Catholic primary school in Majcichov*, p. 53.

character of pilot schools (e.g. it regards primary schools in Majcichov, Opoj, Báhoň, Dechtice). I labelled these schools as «hidden» pilot schools.

Regarding the primary school in Opoj, I followed the minutes from meetings of the teacher assembly in 1931-1936, which are archived in the State District Archives in Trnava and are detailed and comprehensibly elaborated⁶². Compared to other primary schools it was a small school, counting 140 pupils on 5th October 1931⁶³. Ernest Miklovič (1907-1977)⁶⁴ was a headmaster in the school years 1931/32-1934/35 and his wife Alžbeta was a teacher. Already after his arrival Miklovič started implementing reform steps, which is well documented in the minutes from 6th June 1932. There is a record on piloting of new curriculum and the teachers were supposed to assess it and propose ideas related to changes for the following school year, deadline being 6th June. It means that reforms were implemented starting in September 1931. The curriculum was to be tested for the period of three years and after its assessment it was meant to be applied for a given period of time⁶⁵. According to Miklovič an advantage of the new curriculum was its unity and independent teaching method⁶⁶. In the minutes from 2nd September 1932 it is recorded that «in this school year we will continue in implementation of school reforms»⁶⁷.

Other records, which certify the pilot-character of the school, can be presented and specific manifestations can be identified. Similarly to Kopčan in Majcichov, Miklovič organised school trips. The following statement can be found in the minutes from 26th May 1931. «The best local history course is a school trip»⁶⁸. Miklovič expressed himself toward the subject Sums, which he taught, in the minutes from 6th June 1932: «Let the timetable of the subject matter not to be restricted to 20, it is necessary to follow the interest of children»⁶⁹. Regarding Reading, which was taught by Miklovič's wife, the following can be read in the minutes from 14th December 1932. «She implemented reading from cards, because the ABC books do not comply and this new method of reading proved itself»⁷⁰. It can be assumed that she used the global method of reading.

⁶² Regarding official pilot schools, the minutes from the meetings of teachers at the Burgher school for Boys in Trnava were found in the State District Archives in Trnava, too, however, the minutes were archived only since 1937 and it was not detailed. The list of students attending the school was also found.

⁶³ Primary school in Majcichov had 284 on the same date (State District Archives Trnava, collection ŠI Trnava, file no. 162, box no. 119).

⁶⁴ E. Miklovič graduated from the Teacher Institute in Modra (1926) and in the interwar period he belonged to notable teacher figures of the Slovak reform education.

⁶⁵ State District Archives Trnava, collection ŠI Trnava, file no. 93, box no. 7.

⁶⁶ *Ibid.*

⁶⁷ *Ibid.*

⁶⁸ *Ibid.*

⁶⁹ *Ibid.*

⁷⁰ *Ibid.*

In several minutes references to magazines and journals can be found – for children a new magazine *Mladý život* (*Young Life*)⁷¹ was recommended and *Naša škola* (*Our School*), *Tvorivá škola* (*Creative School*), *Komenský* (*Comenius*), *Pedagogické rozhľady* (*Educational Horizons*)⁷² were recommended for teachers. References to and recommendations of several reform educational activities can be found, too: excursion to pilot Prague schools (the minutes from 2nd September 1932 and 6th October 1933), participation in 5th Congress for Research of Children in Brno (the minutes from 6th October 1933), recommendations of attending Trnava Seminar of Education (the minutes from 23rd October 1934), excursion to pilot school in Zlín (the minutes from 9th March 1935), a lecture by Ludovít Kukula in the seminar of education on *The Impact of Philosophy on Pedagogy* (the minutes from 23rd October 1934), etc.

Based on the minutes archived for the period 1931-1935 it can be concluded that Miklovič implemented reform activities systematically, at the end of a school year he and the teachers assessed them and proposed possible changes for the following year. Pupils were differentiated and reform methods were applied in all classrooms⁷³. He activated pupils through school trips, he held the so called children's day and many other activities. The analysis also reveals that Miklovič was closely connected to the centre of reform events in Trnava -Trnava Seminar of Education. He also contributed to the journal *Naša škola*.

After Miklovič's departure Viktor Maar took the office of an administrator in 1935; the minutes from 23rd March 1936 provide information on an excursion to the primary school in Majcichov⁷⁴. Therefore, it can be assumed that Maar continued in the reform direction of the school. Even though the primary school in Opoj was not officially authorised as a pilot school, de facto it was one.

6. Conclusion – Impact of the Educational Reform Movement on Creation of National Identity of Slovaks

Regarding national awareness of Slovaks and Slovak nation after the creation of the first Czechoslovak republic it may be stated that it was in a specific situation in comparison to neighbouring nations. The reason was that national education did not exist in fact. Strong magyarisation, especially after the Austro-Hungarian Compromise in 1867, started to inhibit national awareness of Slovaks and it caused slowing down, even stopping, of this process. Slovaks together with Czech nation created a new joint state in 1918, but they were at a very different economical,

⁷¹ *Ibid.*

⁷² *Ibid.*

⁷³ *Ibid.*

⁷⁴ *Ibid.*

social and cultural level. According to Šuhajdová⁷⁵ «interwar problems of adult population such as unemployment, poverty, poor health, divorce rate, housing and sanitary conditions or developing socio-pathological phenomena» represented a problem for Slovak children and the youth as well.

However, the new political situation created a space for a dynamic process of national awareness and creation of identity of Slovak nation. Education and schooling represented a key element. At first it was more about a material renewal of education: building new schools of all levels, reconstruction of existing schools of all levels, modernization of school equipment⁷⁶, etc. It was immediately accompanied by gradual elimination of illiteracy⁷⁷. Organisational and content transformation of education was the most demanding task. Throughout two decades of the interwar period a systematic transformation of education did not occur. After several unsuccessful attempts for a reform teachers and public were becoming sceptic. Despite, it can be stated that Slovak education (national, secondary and vocational) experienced a large qualitative and quantitative shift forward during the first decade of the newly created state.

The process of national awareness in the field of education and schooling in the interwar period can be noted in three areas: 1) in re-Slovakisation of the school system at all levels; after 1918 the language of instruction became Slovak language and Slovak teachers started to teach there, 2) in formation of Slovak scientific pedagogy in the first pedagogical institution in Slovakia – in *Seminar of Education* at the Faculty of Arts, Comenius University in Bratislava (established in 1923/24); its founding was assisted by Czech university pedagogues⁷⁸ and last but not least 3) in the development of the educational reform movement through reform teachers in pilot and «hidden» pilot schools, who were unsatisfied with slow school reforms from the side of the state. Czech teachers became significantly involved in the processes of dynamic renewal of education at all levels. This assistance was necessary; however, it had its positives and negatives, too. After the already mentioned magyarisation pressure, Slovaks could not develop their education through their own national elites and they needed help from the side of Czech educational elite and Czech

⁷⁵ I. Šuhajdová, *Sociálno-pedagogické otázky detí a mládeže v medzivojnovom období* [Socio-educational issues of children and youth in the interwar period], in B. Kudláčová (ed.), *Pedagogické myslenie a školstvo na Slovensku v medzivojnovom období* [Educational thinking and education in Slovakia in the interwar period], Bratislava, Veda/Typi Universitatys Tyrnaviensis, 2014, pp. 154-166.

⁷⁶ During the first decade of CSR (1918-1928) 314 primary schools and 17 burgher schools were built. 140 primary schools and 5 burgher schools were reconstructed.

⁷⁷ The number of unschooled children in 1918 was estimated to 40-50 thousand; in 1931 it was changed to 4037 children.

⁷⁸ The Seminar was led by Czech professors, graduates from the Seminar of Education from the period of O. Kádner since its establishment until 1938. In 1923-1927 it was O. Chlup, in 1928-1937 J. Hendrich and in 1937/1938 J. Uher. Only since 1938 the Seminar of Education was led by the first Slovak, J. Čečetka.

teachers. It represented a rather complicated situation from the perspective of national discussion and national-emancipative movement. On one hand, it was obvious that Slovak national movement would not manage without Czech help; on the other hand, it weakened Slovak nation's self-esteem, which could have finally started a politically independent stage of development from the national perspective after 1918. The situation was even more complicated due to ideas of czechoslovakism (a united nation of Czechs and Slovaks), promoted by Czech political representatives in CSR. Formally, the arrival of Czech teachers was perceived as a proof of help as well as educational and cultural closeness of Czechs and Slovaks. However, the ideas of czechoslovakism, which were a political construct, raised many questions in Slovakia: whether, for instance, it does not regard a repeated underestimation of Slovak independence and cultural and educational autonomy.

Concerning the reform movement in Slovakia, it can be claimed that implementation of reformatory-educational conceptions and ideas was more open and offered better possibilities for national awareness of Slovak children than mainstream education and schooling. Such conclusions are based on the following:

- reform teachers were full of enthusiasm and due to being involved in the process of education more personally, they had a bigger influence on children,
- teachers established various voluntary associations, which enabled very quick passing and spreading of reform ideas,
- teachers were involved in the offer of leisure time activities for children more,
- provision of collective education and leading the children to responsibility for joint things and teaching them civic participation (e.g. pupils' self-governing bodies, pupils' assembly)
- organisation of school trips focused on discovering attractive places and parts of Slovakia,
- founding pupils' and teachers' libraries at schools,
- involvement of parents (parents' meetings),
- many from the reform teachers carried out various educational activities for public in the region they taught in, etc.

The basic developmental lines of Slovak reformatory-educational discussion are overlapping with Czech milestones and significant ideas came from Czech pedagogues and teachers. However, this fact did not hinder acceptance and interiorisation of the ideas of reform educational movement by Slovak teachers, who developed them further and applied them in a creative manner with regard to the specific situation in education in Slovakia. Slovak education was under a strong influence of Czech educational discussion in Czechoslovakia in the interwar period. However, it managed to process it with regard to its own tradition – Czech teachers teaching in Slovakia were aware of it; some more, some less. Mostly, it was about very fruitful mutual meetings of Czech

educational impact and Slovak tradition, as it is shown by individual exemplary cases of selected reformativ-educational institutions.

The history of Slovak reform movement in the interwar period «is processed only fragmentarily»⁷⁹ and not supported by archival research. There is a logical reason for the missing comprehensive treatment of this subject: in the period of socialism the reform educational movements were perceived as bourgeois excesses and therefore, specialised literature from the period of socialism provides distorted information on the educational reform movement in Czechoslovakia in the interwar period. Objective historical reconstruction of this period in history is possible only through archival research. Deeper interpretations and evaluations can be only based on the archival research.

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⁷⁹ A. Rajský, *Problém kontinuity a diskontinuity dějín a dejepisu* [The problem of continuity and discontinuity of history and historical science], in B. Kudláčová (ed.), *Pedagogické myslenie a školstvo na Slovensku v medzivojnovom období* [Educational thinking and education in Slovakia in the interwar period], Bratislava, Veda/Typi Universitatys Tyrnaviensis, 2014, pp. 8-16.

School military education and the construction of a national identity in Portugal in the passage from the 19th to the 20th century

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ABSTRACT: The liberal and republican discourses produced in Portugal in the transition from the nineteenth century to the twentieth century emphasized the figure of the citizen-soldier as part of the civic cult of the Nation. The ideal citizen of the new Republic, proclaimed at last in 1910, should be orderly, disciplined, morally exemplary and physically fit to address the harshness and needs of the war, besides being an unconditional lover of his Homeland. With this article we intend to promote a reflection on the purposes and character of the youth militarization project developed, in two different moments of the above-mentioned period, under the predominant influence of republicanism. Forwarding both moments of the study, our concern goes to the relations between military instruction and other curricular areas, particularly physical education, and moral and civic education. We will pay attention to the ritual practices that are developed which are an alternative to the catholic ritualism. In addition, the controversies with expression in the pedagogical field that have permanently accompanied the implementation of military preparation are analysed. Finally, we will seek to integrate the aforementioned project within the framework of international experiences, which had the same goals.

EET-TEE KEYWORDS: Republicanism; Civics; National Identity; Primary School; Military Education; Citizen-soldier; School battalions; Portugal; XIX-XX Centuries.

Introduction

During the 1880s, a time when we witness in Portugal the first major experience of educational decentralization, the Lisbon Municipality's Instruction Department, mainly through the action of Republican Masons, implements an ambitious project of popular education. Actually, this department starts a set of measures in order to modernize education, attempting to track the movements of pedagogical innovation in Europe's reference countries. The strongest evidence goes, among others, to the military gymnastics and schools battalions. However, in Portugal its diffusion was not as remarkable as in other countries of Western political and cultural space. Nevertheless, schools battalions represented a backdrop of divergent opinions sometimes associated with controversy. In what follows, we will see that the introduction of school battalions in the Lisbon's Municipality is an active part of a pedagogical attitude whose intention is to articulate the physical, intellectual and moral education – the concept of «integral education». Indeed, for republicans the broadcasting of their ideals necessarily meant the existence of a renewed primary school, which would be capable of teaching an enriched programme – the graded school.

After the implementation of the 1st Republic, in 1910, the idea of school battalions recovered from its effective extinction in the past 1890s. A project was then developed in primary schools aiming the Preparatory Military Instruction of young Portuguese. Beyond the military training of future citizens, which allowed them, if necessary, to defend the Homeland bearing arms in case of danger, Preparatory Military Instruction had equally among its goals to persuade those young men to interiorize a set of values and skills considered essential. Thus, Preparatory Military Instruction arises strongly articulated with both physical education, which contributes to their development during an early stage, and moral and civic education of a secular bias reinforced in that period. It also underlies the ritual exhibition of school battalions within the public space during moments of civic festivity.

Our theses are sustained by a range of sources, including educational periodicals, documents produced by the Lisbon Municipality's Instruction Department, namely received correspondence from the schools battalions' offices, and publications produced within the Preparatory Military Instruction context, and the societies organized to broadcast it, in addition to a set of other pedagogical publications.

School battalions of Lisbon's municipality (1880s)

In Portugal, it is after the definitive instauration of the liberal regime (1834) that the need for physical education arises via three sectors: military, medical

and educational¹. It is also important to mention that during the second half of the nineteenth century there is a progressive change in the orientation of physical education. Indeed, the hygienic and military perspective gives rise to an «insistent military preparation»². In one sense, the defence of physical education does not constitute more than an aspect of educational campaign promoted by the bourgeoisies' elites with the intent to create a national consciousness. Moreover, in the 1870s arises the idea that introducing military instruction in primary school would contribute to military regeneration and the country's defence, according to the perspective of Luís Jardim, educational councilman of the Lisbon's City Hall:

When talking about physical education it should not be forgotten that it is convenient to expand primary education with military instruction. This exercise improves the student's physical conditions, leads the population to accept the military organization of Germany and Switzerland, and the main reason, that today is so little attended, it ends with the repugnance of our people for the recruitment; this repugnance is so ingrained that it is one of the main reasons for emigration³.

And it is only in the 1880s – period during which the first great experience of educational decentralization takes place in Portugal – that gymnastics becomes part of the primary school curriculum (complementary degree), not without causing controversy and some opposition, especially since the measure extended itself to female education; no less important are the efforts of Lisbon's municipality to introduce physical education and military gymnastics in schools since the previous decade. Indeed, from the school year of 1875/76, a sum for this purpose is included in the budget of the aforementioned municipality. However, that sum was exclusively allocated to Central School Nr. 1⁴. The reason is related to the fact that it was a school built by municipal initiative at the request of Elias Garcia⁵, educational councilman; it is, in fact, the first graded school⁶ to be opened in Portugal (1875). The belief of Elias Garcia is clear: he believed that the diffusion of republican ideals obligatory meant the existence of a renewed primary school capable of providing an enriched programme. The underlying idea is the articulation of physical, intellectual and moral education

¹ A. Estrela, *Elementos e Reflexões sobre a Educação Física em Portugal, no Período Compreendido entre 1834 e 1910*, «Boletim INEF», n. 1-2, from January to June 1972, pp. 19-32.

² *Ibid.*, p. 25.

³ L. Jardim, *A Instrução Primária no Município de Lisboa*, Lisboa, Typographia de Christovão Augusto Rodrigues, 1877, p. 26.

⁴ J. Elias Garcia, *A Instrução Militar na Eschola Primária e no Lyceu*, «Froebel», n. 7, 1st September 1882, pp. 51-52.

⁵ Elias Garcia was a military engineer by training. He founded the first republican newspaper and he was a member of the Portuguese Freemasonry from 1853 on, and was even elected grand-master in 1885.

⁶ It is useful to mention that in Portugal expressions like «central school» and «graded school» have identical meanings.

– the concept of «integral education»⁷. From this point of view, the enthusiasm for graded school organization – adopted in all cultured nations and based upon the principles of labour division for optimizing results⁸ – reflected the possibility to effectively respond to the intention of schooling a high number of children and promoting the republican principles. The symbolic significance enclosing the inauguration of a graded school with several classes is easily understood for it is, in fact, very different than creating a unitary school. Indeed, the buildings of graded schools would serve as privileged spaces for conducting civic celebrations and school rituals⁹ (for example, military parades).

Throughout the decentralizing cycle, in force between 1881 and 1892, and framed by the Reform of António Rodrigues Sampaio (Law of 02/05/1878), Lisbon's municipality will act on its own, that is, exceeding the powers and competencies transferred from the centralized administration¹⁰. The succeeding councilmen, especially until the mid-1880s, are lead «by the desire [...] of endowing the city of Lisbon with all the improvements that the most educated countries in Europe have»¹¹.

It is within this new political context that the organization of school battalions in Lisbon's municipal schools should be understood in 1882; Teófilo Ferreira¹² was then the educational councilman, whom, despite being monarchical, concretized the intents of Elias Garcia. This circumstance – the different political positioning of the aforementioned councilmen – surpasses the value of foreign educational reference, the idea that educational improvement meant the appropriation of modern pedagogical methods, if you will; it should, therefore, be understood in the framework of international educational networks¹³. A question that emerges from the thought of Teófilo Ferreira:

Regarding the battalions, I was the one that organized them in Lisbon, obeying to the enthusiasm with which similar institution was welcomed in some of the foreign countries I have visited. However, I must confess to the Parliament members that in educational matters there are some innovations that share the contingencies and whims of fashion¹⁴.

⁷ A. Nóvoa, *Evidentemente*, Porto, Edições ASA, 2005.

⁸ M.M. del Pozo Andrés, *Urbanismo y Educación. Política Educativa y Expansión Escolar en Madrid (1900-1931)*, Alcalá de Henares, Universidad de Alcalá, 1999.

⁹ We use this concept within the meaning assigned to it by P. Maclaren, *Schooling as a Ritual Performance*, London and Boston, Routledge & Kegan Paul, 1986.

¹⁰ C. Manique da Silva, *Do modo de aprender e de ensinar. Renovação pedagógica e cenários de experimentação da escola graduada (1834-1892)*, Tese de Doutoramento em História da Educação, Faculdade de Psicologia e de Ciências da Educação, Universidade de Lisboa, 2008.

¹¹ *Diário do Governo*, nr. 84, 15th April 1886, p. 1022.

¹² Teófilo Ferreira, besides being educational councilman (position that he held until 1883), was a teacher of primary and normal school, as well as doctor of medicine and parliamentarian.

¹³ A.C. Venancio Mignot, J. Gonçalves Gondra, *Viagens de educadores e circulação de modelos pedagógicos*, in A.C. Venancio Mignot, J. Gonçalves Gondra (edd.), *Viagens pedagógicas*, São Paulo, Cortez, 2007, pp. 7-14.

¹⁴ T. Ferreira, *O Ministério da Instrução Publica e a centralização do ensino primário oficial*, Lisboa, Imprensa Nacional, 1890, p. 22.

The words of Teófilo Ferreira, uttered at a time when the return to centralization policies was felt, emphasize the alignment with the cultured nations of Europe and an inflection on the way to perspective school battalions. Regarding the first idea, the French example is a reference. The temporal coincidence of experiences should be underlined, despite the scale differences¹⁵. In fact, the decree of 6th July 1882, signed by the minister Jules Ferry, introduces school battalions in France, whose disappearance can be accepted in 1891¹⁶. But that does not mean admitting a parallel evolution. On the contrary, throughout the text we will seek to highlight *variations*, thus emphasizing the diversity of experiences related to contexts and actors. On the other hand, and recovering the last words of Teófilo Ferreira, over the 1880s a change in the way school battalions are perceived by different segments of society is clear. Indeed, from an initial excitement with the students' premature military instruction (although not consensual) there is an evolution towards a discredit situation regarding pedagogical advantages of «starting in general school the soldier's special education», to adopt the expression of Adolfo Coelho¹⁷.

What seems to be important to emphasise – and it is independent of political certification – is that the implementation of school battalions reflects the possibility of «thinking the nation»¹⁸ according to the teaching of civic virtues, a set of moral and patriotic practices and discourses. However, it is useful to consider, in line with the arguments of Nicolas Mariot, that «civic enthusiasm» cannot only be read as an official «intention». That is to say that to be effective it has to be «an enthusiasm manifested in a civic situation recognized as such by the participants»¹⁹. Moreover, from the historical point of view it is not possible to assign to the school just replication and integration functions.

Evoking now the historical background of the Lisbon's municipality school battalions, it must be said that the motive for their introduction appears to be closely linked to the thesis of the country's military regeneration, already advocated by Luis Jardim in the 1870s. It is not, however, a similar situation to the one registered in France; among other constraints, the defeat of 1871

¹⁵ Indeed, in France, in the year of 1886, there were 146 school battalions regularly constituted, spread over several municipalities, meaning a total workforce of about 29,000 students. A. Brouzac, *Les bataillons scolaires 1880-1891. L'éducation militaire à l'école de la République*, Paris, L'Harmattan, 2004. On the other hand, in Portugal, during the 1880s, school battalions are practically confined to the capital's municipality, and the effective students properly integrated have never exceeded a few hundred.

¹⁶ See Brouzac, *Les bataillons scolaires 1880-1891*, cit. For the institution of the battalions, the author emphasizes the reference of the Paris school battalion, founded in 1881.

¹⁷ Quoted by Rogério Fernandes in *As ideias pedagógicas de Francisco Adolfo Coelho*, Lisboa, Fundação Calouste Gulbenkian, 1973, p. 458.

¹⁸ We have adopted this expression from the work of Benedict Anderson: *Imagined communities: reflections on the origin and spread of nationalism*, 5th impr, London, Verso, 1989.

¹⁹ N. Mariot, *Qu'est-ce qu'un «enthousiasme civique»? Sur l'historiographie des fêtes politiques en France après 1789*, «Annales. Histoire, Sciences Sociales», n. 1, 2008, pp. 113-139, in particular p. 138.

against the Prussian army would have created the conditions for the emergence of school battalions²⁰. Albert Brouzac even speaks in a sense of «revenge»²¹.

What was actually scheduled was the youth familiarization with military service, something that among other things involved an important exhibition component of the so-called «soldiers-students», particularly associated with solemn moments and festivities. In this regard, take notice on the way one of the first public appearances of Lisbon's municipality school battalions is described:

When on last 24th December [1882], in the Navy's Arsenal risk room, there was the distribution of prizes to the students of the central and parochial municipal schools, their majesties honour guard was carried out by the 1st company of municipal soldier-students, which in number of 80, perfectly armed and equipped, showed a martial garb and a correction of evolutions worthy of enthusiastic reception, during and after the ceremony; everywhere in the streets the quivering and consecration of the capital's people was felt towards the patriotic crusade that the municipality experienced for the greater good of our military regeneration²².

In addition to the exaltation of the population's enthusiasm, the writer seeks to highlight the apparatus of the civic celebration accomplished through the symbolism of body postures, choreographies, and uniforms. Actually, as noted by Rosa Fátima de Sousa, «school battalions symbolized one of the primary purposes of public school: civic celebration»²³. In this sense, it helped to reinforce the imaginary and to institute a national memory. Thus, there is no surprise in the Lisbon's municipality initial investment in equipping school battalions, acquiring armament (references in this case were the weapons used in Paris' schools) and other equipment abroad²⁴.

At an early moment, however, the importance granted to uniforms, insignias, and armaments – notoriously symbolic and scenic – hides organizational weaknesses. Moreover, contrarily to what has happened in France²⁵, Lisbon's municipality battalions would never have a very definite and consistent regulation. On the other hand, and this is another distinctive aspect from the French case, municipal tutelage would overlap military authority²⁶. In fact, and despite the fact that teachers of gymnastics and military exercises were professional military, there is a chain in command whose top is occupied by

²⁰ Brouzac, *Les bataillons scolaires 1880-1891*, cit.

²¹ *Ibid.*

²² *O Batalhão Escolar do Município Lisbonense*, «Froebel», n. 13, 1883, pp. 97-99, in particular p. 98.

²³ R.F. de Sousa, *A militarização da infância: expressões do nacionalismo na cultura brasileira*, «Cadernos Cedes», n. 52, 2000, pp. 104-121, in partic. p. 108.

²⁴ *O Batalhão Escolar do Município Lisbonense*, cit.

²⁵ Brouzac, *Les bataillons scolaires 1880-1891*, cit.

²⁶ In France, school battalions were under the tutelage of three ministries. See Brouzac, *Les bataillons scolaires 1880-1891*, cit.

the educational councilman²⁷. The regulatory vagueness does not prevent, until 1886 (moment where the decline of school battalions becomes evident), the implementation of military instruction by the municipality in the 16 central or graded male schools, and in some unitary schools²⁸.

But, rather than focusing on school battalions, our research agenda will pay particular attention to the following: i) the ideal of civic celebration associated with the great events of the nation's history; ii) the way military practices penetrate in daily school life.

First, let us see what was the shape assumed by public ceremonial reverence devoted to the nation's deeds/heroes; if you prefer, how the nationalistic imaginary dealt with these themes (eminently civic), in order to provide the nation with a history. It is clear, however, that the idea of training «good patriots» was not reduced to youth militarization. Indeed, as argued by Pierre Arnaud, «the ideology of education will be permeated with a key idea: the duty to the Homeland»²⁹. Regarding teaching development, this means that subjects, such as history, geography, and civic education, would be *instrumentalised* within that scope.

Among the various celebrations where the battalions of the Lisbon's municipality were present, we emphasise the one that took place in 16th September 1885, particularly due to the duration of the festivities (which have lasted a week) and their laudatory tone. It was the official acknowledgment of Hermenegildo Capelo and Roberto Ivens, who were raised to the status of national heroes after another exploration voyage to the lands of Africa. To contextualize, this expedition had a particular importance to Portugal's affirmation in Central Africa at a time when its hegemony in that part of the globe was seriously threatened. Hence, the Lisbon's City Hall played an important role in the aforementioned celebrations (organized by the Lisbon's Geography Society), associating school battalions to it:

A City Hall's committee will await the distinguished explorers upon arrival. Following the landing of the Navy's Arsenal, the City Hall will receive the distinguished explorers in the

²⁷ It is important to say that in 1882 the intention was the creation of a school battalion with students from the six male central schools existent to date. The evolution was the following: in 1886, the 1st school battalion was formed by Central School's platoons 2, 6, 11, 13 and 17; on that same year, the 2nd school battalion was composed by Central School's platoons 1, 4, 8 and 15. *O Batalhão Escolar do Município Lisbonense*, cit., «Boletim do Serviço Geral de Instrução Pública da Câmara Municipal de Lisboa», n. 1, 1887 and Arquivo Histórico da Câmara Municipal de Lisboa (AHCML), *Comunicações da Direção-Geral de Instrução Municipal*, Official note nr. 80, 13th July 1886.

²⁸ «Boletim do Serviço Geral de Instrução Pública da Câmara Municipal de Lisboa», n. 1, 1887.

²⁹ P. Arnaud (ed.), *Les athlètes de la République. Gymnastique, sport et idéologie républicaine. 1870/1914*, Paris, Montréal, L'Harmattan, 1997, pp. 43-44.

great room of its palace, and the president will read a short speech congratulating them on behalf of the city for their return and services [...]. On an opportunely designated day the distinguished explorers will be invited to review the school battalion and receive their salute³⁰.

It should be noted that what is at stake here is the establishment of symbolic elements, exulting and popularizing the nation's great figures – the heroes' cult – to consolidate a cultural identity. Moreover, in the line of research of Anne-Marie Thiesse, a nation worthy of such name should present: «a history establishing continuity with great ancestors, a series of paragons heroes of national virtues, a language, cultural monuments [...]»³¹.

We can better understand the *effect* of the aforementioned celebration, if we keep in mind the investment it entailed and even the changes that it provoked in the schools' daily life. Indeed, the presence of the battalions was arranged with about fifteen days in advance, being determined that, for tests, the Central School Nr. 8 would receive platoons from several schools³². On the other hand, by the educational councilman command, and in order to meet the necessary preparation for the event, choral singing and drawing lessons were suspended at the aforementioned school³³.

Another commemorative festivity associated with the nation's journey where school battalions had an important participation was the 1st December; this date destined to annually celebrate the Restauration of Independence in Portugal. In 1886, for example, it was the very own «1st December Committee» to request to Lisbon's City Hall the presence of the battalions³⁴. What one finds, however, is that from that year on – which corresponds to the apogee of the decentralizing municipality's educational policy³⁵ – uneasiness towards the public displays of «soldier-students» starts to arise. In this regard, an episode which occurred in the context of the 1st December 1886 celebration is elucidating. Indeed, the situation stems from the fact that the executive committee of the Lisbon's City Hall had determined, at a previous time, «not to allow school battalions to take part in acts that are not purely educational»³⁶. But this issue is debated at a City Hall's meeting, and the councilmen, despite expressing arguments in favour and against the decision of the executive committee, end up approving (unanimously) the participation of the school battalions on the 1st December

³⁰ *Arquivo Municipal*, session of 3rd September 1885, p. 390.

³¹ Cited by A. Fontaine, *Alexandre Dagué (1816-1894): une histoire pour les Fribourgeois. La fabrication d'un Roman Cantonal*, «Annales Fribourgeoises», n. 76, 2014, pp. 47-56, in particular p. 55.

³² AHCML, *Gestão administrativa escolar, série memorandos*, Oficial note of 5th September 1885.

³³ *Ibid.*

³⁴ *Arquivo Municipal*, session of 7th September 1886.

³⁵ See Manique da Silva, *Do modo de aprender e de ensinar. Renovação pedagógica e cenários de experimentação da escola graduada (1834-1892)*, cit.

³⁶ *Arquivo Municipal*, session of 27th November 1886, p. 381.

celebrations. However, there are indications that something is changing. For example, councilman Matoso Santos recalled that «it was not convenient that the appearance of the school battalion in the ceremony was very long»³⁷; Elias Garcia felt that the intent of the «1st December Committee» should be accepted, «but without forcing anyone into it, that is, students whose parents do not want them to go should not be obliged»³⁸. It is mostly via body centrality and physical education within the scope of educational discourses produced from the late nineteenth century on that there will be a shift in the way of envisioning school battalions. We shall return to this subject.

However, it would be reducing to think that the public display of battalions was limited to civic celebrations of this kind of nature (greatly associated to the promotion of patriotism). There is, indeed, another kind of public displays where what is at stake is not exactly «national imagination». We refer in particular to the idea of moral character formation. Examples are the presence of battalions: i) at funerals of municipal schools' students; ii) policing public spaces; iii) in communion sessions of welfare institutions' students.

But it is clear that military instruction *per se* presupposes the internalization of discipline, order and respect. It is in this sense, and not so much in the possibility of the youth knowing how to handle weapons, that a prestigious officer sublimates the value of military instruction referring also to obedience, which in his perspective should «arise from the sense of duty and not from the fear of punishment»³⁹.

Let us now look at the way military practices penetrated the daily school life. The example of Central School Nr. 6, where the 1st school battalion was based, constitutes a good starting point. And if it is true, as we have said, that municipal protection overlaps military authority, no less true will be to mark the autonomy enjoyed by the officers in the organization of military instruction – the reference, in fact, is the Army school⁴⁰. This idea, among others, emerges in the following excerpt signed by Joaquim Emídio Xavier Machado, at the time he becomes responsible for military instruction and teaching gymnastics at Central Schools Nr. 6 and Nr. 11:

The war material, uniforms, equipment, and other military items find themselves at the best conservation status [...]. The way I found assembled bookkeeping and other service provisions was also a satisfaction for me [...]. On the military issue itself, everything seems to be in accordance with the general laws of the Army, and because the practices followed

³⁷ *Ibid.*

³⁸ *Ibid.*, p. 382.

³⁹ J.E. Morais Sarmiento, *A instrução militar na escola primaria e no lyceu*, «Diário de Notícias», 27th August 1882, [p. 1].

⁴⁰ Possibly this fact might have prevented that, at the municipal sphere, a proper regulation has been produced.

in these schools revealed righteousness and progress, I have no doubt in using them, certain that I am seeking the usefulness of education⁴¹.

However, he is very critical of the organization of gymnastics which, he argues, is «the indispensable preliminary of military instruction»⁴². At this historical stage there is an idea that begins to take shape: gymnastics and military exercises should become autonomous. Alfredo Dias, teacher of gymnastics at Lisbon's municipal schools, approaches this issue proposing a gymnastics teachers training course⁴³. From his point of view, the City Hall «parodied» the teaching of the aforementioned subject, also adding that in Lisbon the only organized gymnasium was the one of Central School Nr. 1⁴⁴; however, it functioned «more for military exercises than for gymnastics itself due to the way things are organized»⁴⁵.

The image that best reflects what Alfredo Dias intended to emphasize – the military orientation of school gymnastics and, in a way, the nonsense of a military instruction as an end in itself – is given by Adolfo Coelho. At the same time, it is an impressive portrait about the way military instruction configured the daily school life; the criticism of Adolfo Coelho results from the knowledge he has from the guidance given to physical education at several European countries, particularly Germany.

I had recognized that those exercises made the boys look stupid. I observed military instruction in those schools and I visited in 1883 [...] the classes of all the centrals then created in Lisbon, and I watched many stiff, sad, mechanized students due to the effect of that instruction, and when talking with some of them I have collected enough clear confessions that the instructors inspired fear of punishment without making them take the exercises seriously, and respect who instructed them⁴⁶.

On the other hand, sources give the idea that the integration of gymnastics and military exercises in the curriculum brought difficulties with it because it did not adjust to school life. It is noteworthy, for example, the inexistence of articulation between the schedule of a certain curriculum matrix (reading, arithmetic, calligraphy...) and the schedule of gymnastics and military exercises. The transcript that follows elucidates this division well:

⁴¹ AHCMML, *Correspondência recebida/Pelouro da instrução*, Official note nr. 1, 18th October 1886.

⁴² *Ibid.*, Official note nr. 2, 18th October 1886.

⁴³ A. Dias, *Apontamentos para a Reforma e Historia da Educação Physica em Portugal*, Lisboa, Typographia Lisbonense, 1887.

⁴⁴ *Ibid.*

⁴⁵ *Ibid.*, p. 54.

⁴⁶ F.A. Coelho, *Questões Pedagógicas. Os exercícios militares na escola*, «O Instituto», n. 58, 1911, pp. 23-36, in particular p. 29.

[Military] exercises, which last for an hour, end at 5 p.m.; an inconvenient time in the current station for the withdrawing of many students [...]. The lessons in this school end at 2 p.m., hence, and with good results, military exercises could begin a quarter of an hour after the end of those lessons; and thus the aforementioned students would arrive at their homes yet in daylight⁴⁷.

From 1886 the decline of military instruction in schools is clear. Among other factors, some of them already stated, the disturbance caused in the life of the students (and families) would compete for this state of affairs, despite the efforts of the central schools' principals and teachers of military instruction. Attention should be paid to the following report:

The principal said that, due to the scarce attendance of students, some of which always presented an excuse and even skipped school in the days of the drills, in accordance with the teacher, the problem of military exercises would be prevented. Therefore, he had read a letter from his Excellency Mr. João de Melo Pereira de Vasconcelos, where the latter pronounced himself in order to create a lesson on Thursdays [school holiday] and another on a school day, not pre-set on the schedule but arranged with the principal, always preventing in advance the respective military inspector⁴⁸.

But, as stated, it is mainly via the centrality of the body and physical education within the scope of educational discourses produced from the late nineteenth century on that a shift in the way of seeing military instruction is registered. In fact, in 1886, the strength of the hygienist argument is found within the discussion framework of central and unitary schools of the Lisbon's municipality. The positions are fracturing within the republican council. Indeed, Teófilo Braga, admitting not wanting to «offend» his colleague Elias Garcia, states that «no gymnastic should be taught [...] when it is not subordinated to a physiological programme»⁴⁹. In another perspective he argues that «to subordinate the gymnastic movements to the rifle, and the platoon [...] meant the creation of a subservience principle rather than an obedience principle!»⁵⁰.

In May of 1891, relying on the concern about the students' health, the Administrative Committee would not have any doubts to negatively respond to the request of the Portuguese Club Royal Gymnasium regarding the participation of school battalions and its respective bands in a military celebration; nevertheless, the board of the Royal Gymnasium assured the students would not suffer «from fatigue [...] or insolation»⁵¹.

⁴⁷ AHCML, *Correspondência recebida/Pelouro da instrução*, Official note of 31st October 1886.

⁴⁸ AHCML, *Actas escolares/Conferências pedagógicas*, School Assembly session, 7th November 1887.

⁴⁹ *Actas das Sessões da Câmara Municipal de Lisboa*, session of 6th March 1886, p. 115.

⁵⁰ *Ibid.*, p. 116.

⁵¹ *Actas das Sessões da Comissão Administrativa do Município de Lisboa*, session of 13th May 1891, p. 201.



Pic. 1. Lisbon's municipality school battalion group. Officers, sergeants, standard-bearer and bugler of Central School Nr. 6. (Source: «Froebel», 12, 1st January 1883).

Republic, Homeland worship and school youth's militarization

Continuously defended by republicanism and freemasonry sectors, the so-called Preparatory Military Instruction proved to be one of the most emblematic expressions among civic manifestations promoted in the period following the establishment of the Republic in 5th October 1910⁵². The previous experience of school youth's militarization was then resumed and deepened in articulation with a broad set of practices which had patriotism as its great symbolic reference, being directly present in the flag and hymn cults, and in commemorative festivities of moments associated with the nation's journey or in exemplary figures that represented it.

⁵² In this framework we resume and deepen the ideas presented in the following texts: J. Pintassilgo, *República e Formação de Cidadãos: a Educação Cívica nas Escolas Primárias da 1ª República Portuguesa*, Lisboa, Edições Colibri, 1998; J. Pintassilgo, *A Revista de Educação Geral e Técnica no contexto do Portugal republicano. O debate sobre a educação moral e cívica*, in A.R. Schelbauer, J.C.S. Araújo (edd.), *História da Educação pela imprensa*, Campinas, Alínea Editora, 2007, pp. 129-154. About the Preparatory Military Instruction see also the following article: J. Brás, M.N. Gonçalves, *A Instrução Militar Preparatória na I República: A Ginástica da Educação Cívica, a Educação Cívica da Ginástica*, «Vértice», n. 44, February 2009, pp. 49-66.

The first step, taken shortly after the revolution, was the appointment of a committee to prepare a draft regulation. The committee was able to successfully complete their work. The Decree of 26th May 1911 published the regulation and programme of Preparatory Military Instruction. Afterwards, textbooks to support that programme were published⁵³. The respective education was divided in two grades. The 1st grade included young people between 7 and 16 years old. The 1st grade study plan, which comprised primary school, included, in addition to the actual military preparation, civic education, and significant gymnastics and choral singing. Teaching should be implemented in all municipalities and parishes of the country, between the months of October and July, according to the school year, twice a week, at schools, barracks or military instruction camps, and it would be taught by teachers with the help of military instructors. Even summer courses were organized to train primary teachers in this area. Nevertheless, the resistances to such initiative, as well as the scarce number of qualified teachers, made the direct participation of military instructors necessary. These instructors assumed themselves as teachers of Preparatory Military Instruction at several schools. As in France, the military instruction of the primary schools' young students intended at first, in practical terms, their participation in civic events promoted by republicanism. The regulation itself previsions:

Teachers and instructors, with the assistance of administrative bodies, companies and other people, should annually organize patriotic and civic events with gymnastic exercises, sports, choir singing, in which students of preparatory military instruction courses will take part, and to whom prizes should be conferred⁵⁴.

With the intent to mobilize the civil society to this initiative the so-called Preparatory Military Instruction's Societies were created through an ordinance of 1st June 1912, which published the respective regulation. They were assigned the purpose of citizens' military training. The idea was to have permanently prepared citizens to defend the homeland in case of danger⁵⁵. According to one of the project's disseminators, José Eduardo Moreira Sales:

They [Societies] are the beautiful educational centres where the young will learn to develop the body through gymnastics and outdoor games. Therein several civic principles are taught

⁵³ The following are an example: M.F. Almeida, *Instrução Militar Preparatória, 1º Grau: Educação Cívica, Ginástica, Higiene, Em harmonia com o Decreto de 26 de maio de 1911*, Porto, Livraria Académica Editora de J. Guedes da Silva, 1913; B.V. Fernandes, *Manual Elementar de Ginástica: Instrução Militar Preparatória, 1º Grau, Em harmonia com o Decreto Regulamentar de 26 de maio de 1911, 2ª Edição*, Barcelos, Edição do «Centro de Novidades», 1914.

⁵⁴ *Diário do Governo*, nr. 123 of 27th May 1911.

⁵⁵ In the Portuguese National Library the statutes of two of those Societies may be consulted, the Nr. 1, with headquarters in Lisbon, and the Nr. 18 with headquarters in Coruche: *Estatutos da Sociedade de Instrução Militar Preparatória N° 1, Lisboa*, Imprensa Nacional, 1912; *Estatutos da Sociedade de Instrução Militar Preparatória, N° 18, Lisboa*, Imprensa Nacional, 1913.

in order to provide each individual with the consciousness of its duties and its rights. And since the goal is to prepare good citizens, fit to defend their Homeland, shooting instruction has a major importance in those societies⁵⁶.

Accordingly, the Preparatory Military Instruction's Societies have been committed with the organization of activities, such as courses, lectures, conferences, visits and tours. The *Preparatory Military Instruction's Bulletin*, published by Societies Nr. 2 and Nr. 5, and directed by the physician Morais Manchego, gives an account, in its Nr. 2 of June 1913, on the societies' participation in the City Festivities to be held during that month describing the ritual in some detail:

The presentation of Preparatory Military Instruction's Societies, in the hippodrome of Belém, which constitutes, as it is known, one of the festivities' events with which Lisbon will grace its visitors next week, should be enveloped with the greatest brilliancy. All societies have been training intensively, so it is expected that despite its reduced time of instruction this parade will show the advantage of such institutions, proving once more the value of particular initiative when it is imbued with homeland love and affection for the republican institutions. Lisbon's societies will parade the maximum of its effectives and it is expected that the provinces will also be largely represented. It is desirable that everyone would present themselves properly uniformed according to the official regulation in order to achieve harmony⁵⁷.

The programme involves the following steps: societies' «concentration» and respective «formation», delivery of «honour badges» to the societies by the President of the Republic, «Scouting» and «Red Cross» demonstrations, «gymnastic exercises», and finally «march in salute». In the article «details» the Lieutenant Virgílio Dasmasceno Simões presents in greater detail the several steps of the programme. The presence of bands is noteworthy, being the national anthem played in more than one occasion. The ritualism of the moment is well expressed by the description of its final steps: «Upon exercise completion the entire line turns right and parades to the sound of a nuptial march performed by the bands passing in front of the tribune; the standard-bearers will incorporate themselves into their societies as they pass in front of them»⁵⁸. Military exercises actually emerge as functional regarding the acquisition of appropriate body postures to the figure of the «citizen-soldier», and the internalization of republican principles. The used uniforms and designed choreographies assumed the public display of a certain citizen profile, and the sharing of citizenship

⁵⁶ J.E.M. Sales, *O livro do cidadão-soldado*, Lisboa, Papelaria Fernandes, 1912, pp. 104-105.

⁵⁷ *As Festas da Cidade*, «Boletim da Instrução Militar Preparatória», n. 2, June 1913, p. 13.

⁵⁸ V.D. Simões, *Detalhes*, «Boletim da Instrução Militar Preparatória», n. 2, June 1913, p. 13. Such public demonstration occurred in 8th January 1913, in the Hippodrome of Belém, as part of the City Festivities, and we can find a detailed description on the daily newspapers of the time, namely in «O Século», which includes abundant news about the event among the days 1st to 9th June 1913.

values dear to republicanism⁵⁹. It is clearly in the study of this kind of ritual manifestations that concepts like «invention of tradition» (Eric Hobsbawm) or «imagined community» (Benedict Anderson) become functional⁶⁰.

In addition to the public display of the so-called school battalions, military educational practices in liaison with physical education penetrated the daily school life as well. Vidal Oudinot in his *Notas dum Inspetor Escolar* testifies to the presence of that military ritualism inside the school itself from the example of one of the schools of Tomar:

In the following day, at regulatory hour, 12 o'clock, the exercises begun and precisely at the appointed time the aforementioned coronel [Celestino] entered the recreation premises accompanied by other officers [...]. At the voice of command children aligned with a certain élan – and during a quarter of an hour elegantly executed some military exercises. In the eyes of the officers there was a certain astonishment that I carefully and anxiously examined when the evolutions of two, four, and six formed without hesitation or embarrassment. These were followed by the modified Ling gymnastics' exercises. So, the boys were lovely due to their speed and vivacity of movements, and by the gracefulness of their positions⁶¹.

Just as it is defined in the legal diplomas and propaganda texts, Preparatory Military Instruction emerged inextricably linked to civic education. In fact, an important part of the curriculum was dedicated to this subject matter. Henrique Pires Monteiro clearly reiterates that perspective: «By educating the child and the adolescent, Preparatory Military Instruction mainly instils civic virtues; essentially it forms citizens before instructing soldiers»⁶². The desideratum to attain was the «armed nation», as it is referred several times. The ideologists of this initiative keep drawing attention to the need not to confuse the actual military instruction held in barracks with the pre-military preparation thereby included in the school curriculum. Desidério Beça, the most prolific of the Preparatory Military Instruction's propagandists notes exactly that: «It is time for everyone to understand that the intention is not to give the young man a warrior education, nor to create soldiers before time»⁶³. In addition to being directed towards civic education, Preparatory Military Instruction also aspires to train the moral character; at that level it is fundamentally intended to lead the

⁵⁹ In this context, about the articulation between uniforms and choreography see, for example, the following book: J. Nathan, *Uniforms and non-uniforms: Communication through clothing*, New York, Greenwood Press, 1986.

⁶⁰ See E. Hobsbawm, T. Ranger (edd.), *The invention of tradition*, repr., Cambridge, Cambridge University Press, 1985; See Anderson, *Imagined communities*, cit.

⁶¹ V. Oudinot, *Notas dum inspetor escolar. Acção (intra e extra-escolar)*, Porto, Livraria Chardron de Lelo & Irmão, Editores, 1915, p. 37.

⁶² H.P. Monteiro, *A escola primária e o futuro cidadão*, in *Liga Nacional de Instrução: Quarto Congresso Pedagógico (Abril de 1914)*, Lisboa, Imprensa Nacional de Lisboa, 1916, p. 323.

⁶³ D. Beça, *Instrução Militar preparatória*, Lisboa, Papelaria e Tipografia Fernandes & C.^a, [s.d.], p. L.

schoolchildren to internalize the typical discipline of «military spirit»⁶⁴. Despite its revolutionary character, the young Republic thus seeks to assume itself as inherently orderly and disciplined, well aligned with the positivist tradition and the nineteenth-century liberalism.

Another aspect permanently stressed by publicists is the one regarding the primacy of physical education within Preparatory Military Instruction. According to the aforementioned Desidério Beça, the regulation of 26th May 1911 «judiciously based military preparation in physical education»⁶⁵, both tending to the integral formation of man and citizen. The insistency on the importance of physical education is related with the ideological context of the time with emphasis on the following factors: the influence of the positivist organicism, the development of an anthropology well marked by ethnical prejudice, and the advancement of hygienist tendencies in articulation with the new pedagogies. The decay that was admitted to be reaching the Portuguese society was largely explained by the physical degeneration that, according to what was believed at the time, would be penetrating that same society, a situation that was aggravated by the usual absence of physical education on school practices. The affirmation of the imperious need to proceed with the «improvement» and «rejuvenation», «reinforcement» or «physical elevation of the Portuguese race»⁶⁶ has become, due to its repetition, a commonplace of the time's thought as an expression of its regenerating will. The youth's military preparedness, which had the goal of «regenerating the homeland»⁶⁷, was therefore a bold step towards the 'Portuguese renaissance'⁶⁸.

Preparatory Military Instruction had also the explicit purpose of promoting patriotism, central cult of the republican civic religiousness. This fact is clearly present in the content of the programme attached to the aforementioned regulation and in the textbooks published for that purpose, as well as in the remaining legislative or propagandist production. According to the decree-law of 26th May 1911, the aim is to develop in students «the patriotic devotion», «the sense of duty and homeland love»⁶⁹. Therefore, the implementation of military preparedness within school youth emerges as an important dimension of the republican project of citizens' political socialization.

However, this was not a peaceful issue within the pedagogical field. Among the educator of the time, there were several critical voices of the project, and some public controversies actually took place. Tendentiously, Preparatory Military Instruction was defended by politicians and military devoted to the official republicanism with presence in the pedagogical field; in turn, the

⁶⁴ Beça, *Instrução Militar preparatória*, cit., pp. XLIII and 38.

⁶⁵ *Ibid.*, p. XXXIV.

⁶⁶ *Ibid.*, pp. XXX, XXXIV, L and 99-100.

⁶⁷ Sales, *O livro do cidadão-soldado*, cit., pp. 104-105.

⁶⁸ Beça, *Instrução Militar preparatória*, cit., p. XXI.

⁶⁹ *Diário do Governo*, nr. 123, 27th May 1911.

educators close to the pedagogical perspectives of the so-called New School were usually very critical of the experience. Here we will analyse two examples of relatively circumscribed debates. One of them found expression on the pages of the «Revista de Educação: Geral e Técnica», organ of the Pedagogical Studies' Society, one of the most important periodicals devoted to education during the republican period. The contributions here convened are situated between the years of 1911 and 1916. Some of the texts are the result of discussions that took place at the Society's meetings and were reported in its minutes. The other debate involved two teachers, Viriato de Almeida and Augusto de Vasconcelos, and was conducted between December of 1912 and March of 1913, throughout several numbers of one of the most emblematic professional publications of the time, «A Federação Escolar».

In the case of the «Revista de Educação», the majority of opinions therein expressed was contrary to the school military preparation's experience. The used arguments combined anti-chauvinism, anti-militarism, pacifism, and specific pedagogical reasons, such as the critique of an imposed subject or the defence of the child's respect. This was the case of Tolentino de Sousa Ganho, a physical education teacher that by criticizing the perverse association of his subject to military preparation considered the latter only required «an all external discipline», which would not be consistent with the idea that the child is «a delicate organism» and not «a miniature man»⁷⁰. All the necessary competencies of the modern democracies' citizen-soldier – stamina, initiative, coolness – would be provided, in this author's opinion, by physical education, which addressed «the soul through the body», and not by Preparatory Military Instruction, which «may act upon the body, but paralyses the brain»⁷¹. In the same sense, F. Pinto de Miranda pronounced himself in an article devoted to physical education in primary school; one of the main conclusions was as follows: «School battalions, teaching of company or regiment's abstract tactic, short range shot, are inappropriate things in school, which are opposed to its neutral spirit»⁷².

One of the central pieces of this debate was Adolfo Lima, one of the chief Portuguese references of the renewing pedagogical movement, libertarian intellectual, inspirer of the paradigmatic experience of the School-Workshop Nr. 1, director of the renewed Primary Normal School of Lisbon, and author of major works, such as *Pedagogia Sociológica* and *Metodologia*. It was the thesis of the school's political and religious neutrality that was a starting point, during the World War, for Adolfo Lima to reflect upon the mission of the school – «create individualities» – and its relation with war, in an article

⁷⁰ T.S. Ganho, *A Instrução Militar Preparatória*, «Revista de Educação: Geral e Técnica», vol. 1, n. 1, January 1911, p. 27.

⁷¹ Ganho, *A Instrução Militar Preparatória*, cit., p. 32.

⁷² F.P. Miranda, *A educação física na escola primária*, «Revista de Educação: Geral e Técnica», vol. 1, n. 3, April 1912, p. 221.

significantly entitled *The school and the war*. According to the author, the child should be educated to «love peace» and «hate war», which did not question the acquisition of the necessary physical and moral strength that would allow the child to fight for an «ideal», reaching the «paradox of fighting in order to gain peace». These goals could only be achieved if the school would be «exclusively handed over to pedagogues», not allowing in, «not even as a simple gymnastic teacher, the military»⁷³.

In one of the society's meetings, Frederico Ferreira Simas, himself military, several times member of the society's board, and future director of the Institute of Odivelas during several decades, was the one that most explicitly manifested his agreement with the official stance by considering that «to train the citizen is to train the soldier», and that «military spirit is compatible with democracy», concluding with the idea that «patriotic feeling, habit of discipline and solidarity... should be created and developed at an early age»⁷⁴.

One of the most interesting texts published in the pages of the «Revista de Educação», where the theme of military preparation is presented albeit indirectly, is signed by António Aurélio da Costa Ferreira, physician and educator, promoter of some of the most innovative pedagogical experiences of the time (namely regarding the education of the so-called «abnormal»), and at that time director of Casa Pia of Lisbon. The article is meaningfully entitled *Gymnastics – school of moral and civility*. To justify such articulation the author lists the set of «qualities» or «virtues» considered to be «fundamental», which could be acquired and developed through «command gymnastics' exercises»: «discipline, attention, will, method, order». Placing himself in a militant republican perspective, Costa Ferreira clearly emphasises the values associated with social order, discipline and obedience. «A society without order is not a society» he says. The contribution of gymnastics for the «overall discipline» and thereby for the development of «homeland sentiment», and the training of the «citizen-soldier» seemed decisive to him.

I firmly believe [...] that it is by cultivating the spirit of discipline [...], the instinct of obedience, the subordination of the individual to the whole, that we will prepare the good soldier, which once in row will obey with minimum effort as it is indispensable, and the good citizen, which once in society will naturally obey the laws as it is convenient⁷⁵.

Costa Ferreira seeks to anticipate potential criticism from the pedagogical field articulating disciplinary practices he proposed with the more dear principles of the New School, with which he clearly relates.

⁷³ A. Lima, *A escola e a guerra*, «Revista de Educação: Geral e Técnica», vol. 3, n. 2, October 1914, pp. 170-172.

⁷⁴ F.F. Simas, *Atas das sessões. Sessão de 25 de Abril de 1911*, «Revista de Educação: Geral e Técnica», vol. 1, n. 4, July 1912, pp. 349-350.

⁷⁵ A.A.C. Ferreira, *Ginástica: Escola de moral e de civismo*, «Revista de Educação: Geral e Técnica», vol. 5, n. 1-2, October 1916, p. 89.

I know that there are often remarks about this disciplined education, this culture of obedience spirit may lead to the sacrifice of the student's personality, his individual initiative, and may result in his loss, turning him into a passive being, mechanized, automatic, that only knows how to obey [...]. It is side by side with command and obedience gymnastics that great importance is given to the culture of games [...], the culture of affectivity [...], and above all the most absolute respect for the student's initiative [...]. The teaching of gymnastics cannot and should not evade the fundamental law of modern pedagogy required to teach the child; first of all it needs to be interesting to the child, to be attractive, to be pleasant⁷⁶.

The perceptions of Costa Ferreira anticipate with great clarity one of the great paradoxes of pedagogical modernity – the relation between freedom and discipline (or authority), or yet between autonomy and control. Far from seeing them as antagonistic terms, he seeks to articulate them in a coherent way as part of a wider project of citizen's integral formation. In addition to the political pragmatism – preservation and consolidation of the young and unstable Republic – we find in the author the belief that liberal society, with its cult of individuality and personality, cannot dispense order, discipline and obedience. Physical education – curricular space devoted to the freeing of the body, but also to the modelling of gestures and behaviours – arises here as a fundamental element in the context of an overall governance of individuals through the construction of their subjectivity. Disciplinary mechanisms assembled for such effect should act mainly through self-discipline, focusing both on body and soul.

Between December of 1912 and March of 1913, as previously mentioned, a heated controversy has been developed in the pages of «A Federação Escolar» between two primary school teachers, Viriato de Almeida and Augusto de Vasconcelos; this controversy was held between the numbers 42 to 56 of the newspaper, in a total of ten articles, five for each of the contestants. This was, regarding the public opinion, one of the climaxes on the debate about the subject of school youth's militarization. The synthesis of the arguments summoned throughout the articles' sequence allows us to conduct a systematization of the confronted positions, with the particularity of starring two Portuguese primary teachers. Let us start with Viriato de Almeida, author of the first article of the aforementioned series. In his opinion, the creation of school battalions undermines the primary school's mission, which should be «immensely pacifist»⁷⁷. School should seek to inspire the child's feelings of peace and love, generous and altruistic ideas, teaching the child «to love his peers as a brother». The school would also have an obligation to teach the child to hate «the miserable spectacle» of war, where men were killing each other. Viriato de Almeida clearly highlights his pacifism when he appeals to the development

⁷⁶ *Ibid.*, pp. 86-87.

⁷⁷ V. Almeida, *Batalhões infantis*, «A Federação Escolar», 3ª fase, 1 (42), 15th December 1912, pp. 1-2.

of «a holly crusade against war», despite admitting the possibility of a war to «defend a noble ideal»⁷⁸. Naturally, within that point of view, the spread of the pacifist spirit and the schools' militarization would be absolutely antagonistic tendencies. The author also bases his position in a pedagogical perspective. According to the principles of modern pedagogy, child education would not be compatible with the «iron yoke of military discipline»⁷⁹; furthermore, the child's age would not allow the comprehension of warrior ideas. «Strengthen the child both morally and physically – concludes Viriato de Almeida – and militarize the man»⁸⁰.

The justification of Augusto Vasconcelos for what he calls, like his antagonist, «infant battalions» is centred in nationalistic arguments. The author even admits that the pacifist positions of Viriato de Almeida could eventually be configured as «a crime against the Homeland»⁸¹. In spite of proclaiming not wanting the war, Augusto de Vasconcelos considers that peace would be an utopia; therefore – and even setting aside an aggressive and warmongering policy on Portugal's end – remains, according to the author, the defence of what we have conquered, especially when taking into account the ambitions of the other major powers. Thus, it becomes necessary to attain an «armed nation», that is, «to make all capable citizens able to defend the Homeland»⁸². As a supreme ideal, this notion deserves, in his opinion, an absolute devotion. From that point of view, the usefulness of school battalions would be undeniable, not questioning the school's purpose, depending on the methodology used by teachers. And the author concludes with a solemn statement: «I love infant battalions, which tomorrow will defend our rights of independent nationality. And in this sublime feeling abounds almost the entire nation, only a handful of anarchists naiveties are the exception»⁸³. This last reference is related to the fact that the Portuguese libertarians are the great defenders of the Universalist pacifism that Augusto de Vasconcelos imagines to be the foundation of his opponent's positions.

⁷⁸ V. Almeida, *Batalhões infantis*, «A Federação Escolar», 3ª fase, 1 (44), 29th December 1912, pp. 1-2.

⁷⁹ *Ibid.*, pp. 1-2.

⁸⁰ V. Almeida, *Batalhões infantis*, «A Federação Escolar», 3ª fase, 1 (46), 12th January 1913, p. 1.

⁸¹ A. Vasconcelos, *Batalhões infantis*, «A Federação Escolar», 3ª fase, 1 (43), 22nd December 1912, p. 1.

⁸² A. Vasconcelos, *Batalhões infantis*, «A Federação Escolar», 3ª fase, 1 (48), 26th January 1913, p. 2.

⁸³ *Ibid.*, p. 1.

Conclusion

The experience of school battalions during the 1880s clarifies to what extent the Lisbon's municipality was able to explore the autonomy margins aiming to devise a particular educational policy. On the other hand, what also seems to be very interesting is the fact that educational knowledge – as it is broadcasted and despite maintaining a certain degree of integrity – may acquire new labels depending on the contexts and actors; as we have seen, the international reference are the battalions of Paris. We have also noted that the issue of political certification is not completely sealed. To put it in another way, if the defence of the introduction of gymnastics and military exercises in school is mostly done by republican currents, the truth is that we also find monarchists striving for those same ideas. And it is not less important to emphasise that there is a turning in positions in a very short period of time. In fact, a personality like Teófilo Ferreira rightly points out the ephemerality of some pedagogical innovations. Nevertheless, the school battalions in the Lisbon's municipality will provide reference for future experiments – the historical role they played is mainly associated with the fostering idea of patriotism.

Continuing this initial experience, particularly in the first years of the Republic, the effort to disseminate military preparation in schools, create school battalions and Preparatory Military Instruction Societies, stimulate their participation in public events and promote the emergence of publications devoted to the subject was visible. Those efforts had a relative success. However, similarly to what has happened in other countries, the republican project to militarize young Portuguese did not have a real continuity. The warmongering context that then emerges, from 1916 on, associated to the Portuguese participation in the Great War, creates a favourable environment to the proliferation of discourses touting the educational potential of military preparation. Nevertheless, this context also contributes to inspire, in the pedagogical field, a set of discourses with the opposite meaning. The acclaimed virtues of the republican project of youth militarization are strongly questioned by those sectors that outline an alternative ideal of citizenship based on values as peace and solidarity. One must not forget, however, the positive contribution given by the initiative to the dissemination of physical education in schools, eventually freeing itself from military tutelage to which it had been connected at an early stage.

National identity, civic values and school textbooks in Spain: *La Enciclopedia cíclico-pedagógica* and *El libro de España* (1931-1957)

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ABSTRACT: There has recently been bitter controversy in Spain over the school subject of «Education for Citizenship». However, there is nothing new in the opposition of moral or civic models that sought to forge a national identity in schools. Because of the proximity in time and the coexistence in the same state and the same historical period of the Second Republic (1931-1939) and the early years of the Francoist regime (1939-1957) it is interesting to compare the textbooks of this period. Both regimes coexisted during the three years of civil war (1936-1939) in the clash on the battlefield and in the classroom. They preached «citizens' values» drawing from different sources; textbooks aimed at children of the same age who shared citizenship but lived in different states, one liberal and democratic and the other authoritarian and nationalistic. Our proposal with our article is to review, analyse and compare two of the textbooks used for this purpose: *La Enciclopedia cíclico-pedagógica* and *El libro de España*.

EET-TEE KEYWORDS: Textbook; Civics; Citizenship Education; Nationalism; Francoist Regime; Spain; XX Century.

Introduction

It has been testified by the controversies that have occurred in recent years in Spain around the school subject «Education for Citizenship», that the transmission of explicit values in the school has been of paramount importance¹. In fact, this aim to inculcate certain social or cultural patterns of behaviour is present at the very origins of the educational institutions. States and political and social regimes that dominate them in every time period aim to generate a national consensus with the aim of improving social cohesion. In our time, it has been social cohesion that has strongly arisen as a concept. This official discourse, which has received fierce opposition from enemies (including the church) in the name of tradition or the people's common sense², was intended to unite most of society around a national project supported by a series of shared values emerging from the Spanish Constitution and from the framework of formal freedoms and the derived civic obligations. The Spanish school system, thus born in the first half of the 19th century as a model planned to suit a liberal state characterized by its rigidity, religiosity and centralism³, and almost unchanged until the 1970s, is now dealing with the need to 'renationalise' and 'integrate'. This new juncture has generated and continues to generate conflict, particularly taking into account the demands of the peripheral nationalisms (mainly the Catalan and Basque) that are determined to maintain and extend their own school project, not through the Spanish language and culture, but rather from their own languages and cultures.

However, the contrast of moral and civil models in school is not new. In the same time period and owing to their coexistence in one state at the same time, it is interesting to counterpoise the textbooks of the period of the Second Republic (1931-1939) and the early years of the Francoist regime (1939-1957). Both regimes coexisted during the three years of civil war (1936-1939), and they confronted each other not only on the battlefield, as we will see, but also in the classrooms. They preached 'consensus' and 'cohesions', by drawing from different sources. In both cases, they made textbooks addressed at children of the same age who shared citizenship despite living in different states, one liberal and democratic and the other authoritarian and nationalist. However, the civic and moral values that were mainly proposed were very different in most questions. The items that had to configure the "national identity" were not the same. Contrary to what happens today, that society was not divided by

¹ F. Jáuregui, *La decepción: crónica amarga y secreta de cuatro años de crispación*, Barcelona, Debate, 2007; C. Fernández Liria, P. Fernández Liria, L. Alegre Zahonero, *Educación para la ciudadanía: democracia, capitalismo y estado de derecho*, Madrid, Akal, 2007.

² A. Grimaldos, *La Iglesia en España, 1977-2007*, Barcelona, Península, 2008, pp. 219-244.

³ J. Mainer Baqué, *La erección del sistema educativo en España: de la crisis del modelo liberal al fracaso del reformismo liberal-socialista de la Segunda República*, «Revista de Andorra», n. 11, 2011, pp. 33-55, in particular p. 37.

the geographical origin of the citizens, but was a fragmented society due to the very rigid social classes and the ancestral linguistic and regional belongings. In this context, and although it was a concept that was not used then, the public powers also needed to generate ‘social cohesion’.

1. *The general framework of the textbook in the first third of the twentieth century*

The dictatorship of Primo de Rivera (1923-1939) established the rule of a single textbook for each subject, in order to fight the textbook freedom considered by the authorities of the time as inappropriate for primary and secondary school, because, as they agreed, the intellectual maturity of the students would not allow them to understand the subjects by themselves⁴. The unifying goal of the authoritarian state of Primo de Rivera, which also proposed to attend other problems such as the excessive price of the books or their excessive length, becomes a reality, but not without considerable difficulties⁵. In the textbooks, the dictatorial state did not contemplate the linguistic and territorial diversity, or any other ethical conception that failed to take into account the church’s position. However, General Primo de Rivera, and with him the Spanish monarchy embodied by Alfonso XII, fell from power in the early 1930s. The desires for Spanish citizenship were soon materialized with a new republican regime that placed education at the heart of its political discourse from the outset.

The republican authorities had to work in both directions. First of all, the new republican state would work to eradicate the ‘perpetual ignorance’ of Spanish people; secondly they had to consolidate the new republican values (tolerance, cultural and linguistic diversity, secularism, rationalism). In this context, the role of the textbook had become very important. The old textbooks didn’t serve any more, and new scholarly literature had to be promoted, a literature which took into account firstly the pedagogical issues that had traditionally been neglected and that also contemplated the transmission of civil and moral values to guide the behaviour of the citizens of the new republic state. In order to achieve these objectives, a series of actions were launched that included specific rules for editing manuals and organizational changes in the school structure⁶. The first

⁴ M. de Puelles Benítez, *Política escolar del libro de texto en la España contemporánea*, «Avances en Supervisión Educativa», n. 6, June 2007, <http://adide.org/revista/index.php?option=com_content&task=view&id=198&Itemid=47> (accessed: April 3, 2012).

⁵ *Ibid.*

⁶ P. Villaláin García, *El libro de texto en la Segunda República: una regulación entre el control y la libertad*, «Contribuciones a las Ciencias Sociales», febrero 2011 <<http://eumed.net/rev/cccss/11/pvg.htm>> (accessed: April 2, 2012).

decision from the radical-socialist government was to give up the policy of the single textbook promoted by the Primo de Rivera dictatorship to recommend works by the *Consejo de Instrucción Pública*, which would be included in the list of recommended texts for their scientific and pedagogical quality and also for their editorial quality, as the ministry felt that many of the books circulating in the schools at the time were of very poor quality. The way of supplying textbooks did not change initially with the arrival of the right wing forces in power in 1933, but the recommended textbooks were no longer the same. In 1935, a ministerial decree determined the single textbook, just as had happened during Primo de Rivera's dictatorship. Finally, with the coming of the Popular Front into power in February, 1936, the regulations that imposed the single textbook were turned over and there was a return to the recommendations of the *Consejo de Instrucción Pública* based on their scientific and pedagogical quality. The books included in the ministry's list had to previously be declared of public utility. In Catalonia, as soon as the *Estatut d'Autonomia* was approved (1932), the Government acted similarly with the school textbooks in Catalan, offering a range of readings to choose from⁷.

With the victory of Franco's rebels and the establishment of a totalitarian regime in Spain in 1939, which came to power in 1936 in the areas of the Peninsula where the armed uprising triumphed on 18th July, there was a return to the old educational policies offering a leading role to the Catholic Church and a persecution of linguistic and cultural differences and ended with the secular moral and ethical rationalism that the Second Republic had put forward. The three-year civil war (1936-1939) that followed the putsch of General Franco interfered with republican regime's school projects, as it had to allocate the few resources available primarily to the war effort. Despite the difficulties, the field of schoolbooks maintained the same criteria, although the republican authorities in Madrid and the regional authorities in Barcelona insisted on close supervision of the nature of the books that students used in their learning, discarding any textbook that didn't agree with the civil values of the Republic. The area under Franco's control immediately returned to the single textbook and strict control was imposed on academic materials. In 1937, the compulsory use in every school was decreed of a textbook called *El libro de España*, a textbook that summarizes the 'patriotic values' of Franco's Spain.

⁷ J. González-Agàpito, S. Marqués i Sureda, *El libro escolar en catalán*, in A. Escolano (ed.), *Historia ilustrada del libro escolar en España. Del Antiguo Régimen a la Segunda República*, Madrid, Fundación Germán Sánchez Ruipérez, 1997, pp. 549-577.

2. *Josep Dalmau's Enciclopedia Cíclico-Pedagógica*

This is one of the manuals that was used during the Republican period, and that had been declared of public utility by the *Generalitat de Catalunya*. The edition belonged to *Editores Dalmau Carles Pla*, a publisher's founded in Girona by the renowned teacher Josep Dalmau Carles⁸, a former head of the *Grup Escolar de Girona*, which was very popular in this provincial capital. It is an encyclopaedic text written in Spanish that aims to offer students a scientific and educational journey through all the basics; from language to history and geography, mathematics and biology. At the end of the text three sections are included that are intended to directly affect the education of the future citizens of the Republic: one about Law, another on Social Education and the last about Civic Morality. Although the text is steeped in rationalism and scientism, it is in this final part of the *Enciclopedia Cíclico-Pedagógica* that the main features of the republican ethic to be transmitted to children becomes evident. The chapter on law sets out the legal constitution of the Republic State regarding the rights and duties of citizens, state organization, powers of the local councils, justice, public finances, legislation, military service, labour legislation and foreign relations. Finally, there is a lesson devoted to «our duties», which refers to the cultivation of intelligence and not falling into bad habits, and the dignity of labour. The corollary of this lesson clearly says, «To what rule do we have to adjust our acts. We must always adjust them to doing good».

The chapter that refers to social education mentions all those behaviours considered beneficial for better coexistence. It speaks of urbanity («to maintain friendly relations of harmony with our peers») hygiene, studies, moral obligations, duties to the family and to the Spanish homeland («we have to love our homeland as our second mother, we must work for its glorification, and, if necessary, it is our duty to sacrifice our tranquillity, our goods and even our lives for it») and the duties of courtesy with friends, at school, at home and in the public sphere. Most of these issues are again discussed in the chapter on civic morality. From the beginning it is clear that discerning between good and evil is something that is not only related to religion, but that there is a neutral social morality that tells men how they should behave with other individuals. It talks about the rights and duties of Spaniards, the foundations of law and morality, the laws and justice and the value of work. The citizens' duties in social, family and individual aspects are reviewed. There is even a lesson devoted to the duty to preserve the environment. Finally, the text recalls that «the citizens must obey the republican government, the laws that are enacted and contribute to ensuring order, employment and peace in our country».

As we have seen in this school text from 1939, the republican authorities promoted educational texts in the line of the major changes proposed, and which

⁸ S. Asso Coll, *Biografía del Mestre Josep Dalmau Carles*, Girona, Papers on Demand, 2007.

coincided with the educational ideology from which they drew (the *Institución Libre Enseñanza* and the programs of Spanish socialism): the application of the principle of non-confessional religious development, the development of the principle of respect for student awareness and the effective achievement of teaching as the backbone to their work. We should add the desire to make citizens of the new Republic, which was intended to be modern, rational and tolerant⁹.

3. El Libro de España

This is a textbook imposed by the Francoist regime after 1937; it was an old text dating from 1928 that was compulsory during the Primo de Rivera dictatorship. Francoism adapted it to the new circumstances, emphasizing, as was predictable, the ‘heroic’ events of the Civil War, the origin of the legitimacy of General Franco’s power. This is a manual that comes through the adventures of two orphans, Gonzalo and Antonio, in Spain. The two children, expatriated in an undetermined country, return to the country after the war. On their wanderings, which would bring them to the Basque Country, Aragon, Andalusia, Castile, Santander, Galicia, the Valencian coast and Catalonia, the entire *cosmovision* unwinds that Franco wants to transmit to the new generations. Thus there are the most common clichés of the traditional Spain: the preponderance of religion, the Christian martyrs, the writers and painters of the Golden Age, the monumental Escorial, and the importance of the army and the ‘civilizing’ work of the Spanish Empire. An ‘eternal’ Spain constantly associated with the New Spain emerging from the civil war, without going through the years of the Republic, which become dominated by an anti-Spain ‘break’. Alongside the traditional *glorias patrias* will be placed the martyrs of the Crusade, first of all General Franco, followed by José Antonio Primo de Rivera, founder of the Spanish *Falange*, Onésimo Redondo, one of the founders of *Juntas de Ofensiva Nacional Sindicalista* (JONS), General Moscardo, etc.

The pedagogical ideas of the text, contrary to the republican, highlight the main values of exhorting and intolerant patriotism, obedience, territorial uniformity, sacrifice and the sexism. Franco’s regime aimed to integrate Spaniards in a single united nation; therefore it imposed pedagogy of militancy and will, whose main objective was to renationalize and Christianize the State¹⁰.

⁹ J. González-Agapito, S. Marquès, A. Mayordomo, B. Sureda, *Tradició i renovació pedagògica, 1898-1939. Història de l’educació. Catalunya, Illes Balears, País Valencià*, Barcelona, Publicacions de l’Abadia de Montserrat, 2002, pp. 443-444.

¹⁰ A. Mayordomo (ed.), *Estudios sobre la política educativa durante el franquismo*, València, Universitat de València, 1999, pp. 42.

The instructions from the ministry of *Educación Nacional* to the teachers and inspectors, the texts that were imposed, as well as the educational and political discourses, all went in the same direction. The cohesion that the Francoist regime preached was imposed in a rapid return to the past. In a few years, from the fall of the dictator Miguel Primo de Rivera, the school and the textbooks it used were asked to build two national consensuses (absolutely discordant and confronting): one to generate adhesion to the Spanish Republic, and the other to generate adhesion to Franco.

Against a backdrop of political and social turmoil, two educational models are confronted: one that embodies the *Enciclopedia cíclico-pedagógica* (based on rationalism, scientism and respect for the law) and the other *El libro de España* (militant, authoritarian, sexist and Catholic). The latter of the two was finally imposed as a result of the military victory. This is when the history the Francoist school, a faithful continuation of the centralized, denominational and classist school system created in the early nineteenth century by the birth of the Spanish liberal state, took over.

The *Regents' System* of Marco Agosti between Fascism and democracy

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ABSTRACT: This paper tries to reconstruct the experience of the *Regents' System*, conducted by Marco Agosti in the primary school «Camillo Ugoni» in Brescia (Italy), during the Fascist regime. It was an example of Italian active school, based on the self-government of pupils and on a conception of class as a small corporation. Thanks to its original and innovative characteristics, it was reevaluated in the Second Post-war, as a possible model for a new primary school, aimed at the democratic education of Italian children.

EET-TEE KEYWORDS: History of Education; Primary School; Fascism; Principles of Education; Activity Method; Educational Innovation; Italy; XX Century.

Introduction

The *Regents' System* was an experience of Italian active school according to a Catholic perspective. It was realized by the teacher Marco Agosti in a class of the state primary school «Camillo Ugoni» in Brescia, between 1931 and the outbreak of Second World War, even if the first innovations had already been introduced since 1927. It was born from the pedagogical and didactic reflections developed by Marco Agosti with his best friend Vittorino Chizzolini.

Agosti, at that time aged forty, was a self-educated man, because the humble conditions of his family and the premature death of his father had not allowed him to attend school regularly¹. Nevertheless, he had obtained a normal school

¹ About Agosti, see: M. Mencarelli, *Agosti Marco*, in M. Laeng (ed.), *Enciclopedia pedagogica*, Vol. I, Brescia, La Scuola, 1989, coll. 259-264; M. Falanga, *Marco Agosti educatore e pedagogista*, in Comune di Calcinato, *Per una storia della educazione popolare a Calcinato: profili di protagonisti*, Calcinato, Comune di Calcinato, 1990, pp. 63-77; C. Scurati, *Scuola del popolo e professionalità magistrale in Marco Agosti*, in M. Cattaneo, L. Pazzaglia (edd.), *Maestri*,

diploma, in order to teach in primary school, and a high school diploma at «Liceo Arnaldo» in Brescia; then, in 1927, a degree in Philosophy at the State University of Milan, followed by a second degree in Literature in 1929².

Chizzolini was younger than Agosti³. As primary school teacher, in the early Thirties he was called by mons. Angelo Zammarchi to enter the editorial staff of the Catholic educational magazine «Scuola Italiana Moderna», published by La Scuola Publishing House as a valid aid to prepare future teachers. Chizzolini had a fundamental role in publishing the «Supplemento pedagogico a Scuola Italiana Moderna», a magazine born on his own initiative in 1933, to promote a pedagogical in-depth analysis and different didactic innovations⁴. In the same period, Chizzolini began inspiring the experimentation of the *Regents' System* through his studies at the Catholic University of the Sacred Heart in Milan, his travels around Europe to meet some eminent scholars of Activism (such as Adolphe Ferrière) and his relationships with various innovative teachers and educators. The first results of the experimentation were spread to Italian teachers through the pages of the «Supplemento pedagogico», in some issues compiled by *Magister*⁵ – a pseudonym of Marco Agosti – brotherly guided by Vittorino Chizzolini.

educazione popolare e società in «Scuola Italiana Moderna», 1893-1993, Brescia, La Scuola, 1997, pp. 389-412; C. Scurati, *Agosti Marco*, in Editrice La Scuola 1904-2004, *Catalogo storico*, Brescia, La Scuola, 2004, pp. 113-116; G. Bertagna, E. Scaglia, *Agosti Marco*, in G. Chiosso, R. Sani (dir.), *Dizionario Biografico dell'Educazione, 1800-2000*, 2 voll., Milano, Ed. Bibliografica, 2013, Vol. I, p. 14.

² Those information have been found in a register of Philosophy students' career, conserved at the Historical Archive of the State University of Milan. Agosti was marked with the number of enrollment 1669. His personal folder couldn't currently be consulted, because of a process of relocation.

³ About Chizzolini, see: M. Laeng, *Chizzolini Vittorino*, in Laeng (dir.), *Enciclopedia pedagogica*, Vol. 2, cit., coll. 2586-2590; L. Caimi, *L'ideale del maestro nella riflessione e nelle iniziative di Vittorino Chizzolini*, in Cattaneo, Pazzaglia (edd.), *Maestri educazione popolare e società in «Scuola Italiana Moderna», 1893-1993*, cit., pp. 413-447; E. Damiano (ed.), *Vittorino Chizzolini e l'educazione per lo sviluppo dei popoli*, Brescia, La Scuola, 2001; L. Caimi, *Chizzolini Vittorino*, in Editrice La Scuola 1904-2004, *Catalogo storico*, cit., pp. 113-116; M. Taccolini, *Vittorino Chizzolini. Le opere e i giorni*, Brescia, La Scuola, 2007; E. Damiano (ed.), *La centralità dell'amore. Esplorazioni sulla pedagogia di Vittorino Chizzolini*, Brescia, La Scuola, 2009; Giuseppe Bertagna, *Chizzolini Vittorino*, in Chiosso, Sani (edd.), *Dizionario Biografico dell'Educazione, 1800-2000*, Vol. I, cit., pp. 344-345; Fondazione Giuseppe Tovini (ed.), *Vittorino Chizzolini educatore. Un bresciano protagonista dello sviluppo della scuola italiana*, Brescia, La Scuola, 2014.

⁴ P. Todeschini, *I maestri e la scuola del popolo. Vittorino Chizzolini a «Scuola Italiana Moderna» (1929-1958)*, in Damiano (ed.), *La centralità dell'amore. Esplorazioni sulla pedagogia di Vittorino Chizzolini*, cit., pp. 41-100; B. Orizio, *Il «Supplemento pedagogico». L'attivismo cristiano nel panorama internazionale, temi e protagonisti*, *ibid.*, pp. 101-155.

⁵ Vittorino Chizzolini wrote to Aldo Agazzi: «You will see the name of *Magister* splits itself into two names, Agosti and C. We are preparing a book, in which we are collecting the notes appeared in different issues» (see: letter by Vittorino Chizzolini to Aldo Agazzi, January 8th, 1936, conserved at Archivio per la Storia dell'Educazione in Italia, ASE, Università Cattolica del Sacro Cuore di Brescia, Fondo Aldo Agazzi, Fasc. Corrispondenza 1936).

Since the beginning, the *Regents' System* had represented a first 'step' towards the realization of the ideal of *scuola integrale*, a school aimed at human person's full education⁶. It became, in those terms, an example of innovative school for Italian children during the Fascist regime. Even if it was an 'ordinary' state primary school, Agosti's pupils could experience in first person an original form of disciplinary and organizational self-government, because of the presence of an 'exceptional' teacher like Agosti.

Those features allowed the *Regents' System* to be reintroduced after the end of the Second War World, through a wide pedagogical and didactic reflection, that encouraged *Magister* to publish two successful books: *Verso la scuola integrale. (Il sistema italiano dei reggenti)*⁷ (1950) and *Il sistema italiano dei reggenti. (Breve profilo e note critiche)*⁸ (1952). With this choice, Agosti wanted to introduce to young Italian teachers some of the best educational experiences born in that climate of innovation produced by Lombardo Radice's programmes in 1923, but still valid. Moreover, the promotion of Marco Agosti's 'art of teaching' could put the basis of a 'shared language' among teachers in Italian primary schools⁹, opening a new pedagogical and didactic 'season' after the irreversible crisis of Gentile's *Actualism* and the defeat of Fascism.

1. *The school of Magister: an 'ordinary' primary school*

As just mentioned, the *Regents' System* was experimented in an 'ordinary' state primary school, that is to say a 'common' state primary school. Such as in Maria Boschetti Alberti's «Muzzano» School – made known for the first time in Italy by Giuseppe Lombardo Radice¹⁰ – *Magister* tried to combine the contents of curriculum, the respect for order and the promotion of pupils' spontaneous activities, without having at his disposal a specific space or particular didactic aids. Although his children were educated according to national fascist ideals, they were actively involved in a learning process aimed at making them understand the reasons of natural, cultural, linguistic etc. phenomena that were happening in their everyday life.

⁶ M. Agosti, *Presentazione*, in A. Agosti, *L'applicazione del metodo dei reggenti. (Indirizzi ed esperienze)*, Brescia, La Scuola, 1961, p. 5.

⁷ *Magister*, *Verso la scuola integrale. (Il sistema italiano dei reggenti)*, Brescia, La Scuola, s.d. [1950]. Edizioni successive: 1953 (signed as *Magister*); 1961, 1966, 1970 (signed as Marco Agosti).

⁸ M. Agosti, *Il sistema dei reggenti. (Breve profilo e note critiche)*, Brescia, La Scuola, 1952.

⁹ L'Editrice 'La Scuola', *Avvertenza alla prima edizione*, in M. Agosti, *Verso la scuola integrale. (Il sistema italiano dei reggenti)*, [1950], II ediz., Brescia, La Scuola, 1953, p. 8.

¹⁰ G. Lombardo Radice, *Athena fanciulla. Scienza e poesia della scuola serena*, Firenze, Bemporad, 1925, pp. 223-246. This paper referred to a previous essay of the same author: *Contadinelli ticinesi dai sei ai dieci anni*, «L'Educazione Nazionale», n. 12, 1924, pp. 9-25.

In this way, Agosti developed a «school of life and for life», thanks to an original interpretation of the best achievements of Italian and foreign Activism, re-read in a Catholic perspective.

Agosti's school overcame the old *scuola elementare*, already criticized by the new programmes for primary schools of 1923, in order to become a *scuola primaria*, aimed at the development of the essential dimensions of each human person. In fact, his pupils were guided to reflect gradually on their own experience, to discover and 'germinate' the richness of the culture hidden inside it, with the purpose of implementing it, day by day, through their interaction with the environment. For this reason, in the *Regents' System* each traditional school activity was achieved in the form of a *tirocinio di vita e di azione* («traineeship of life and action»)¹¹, developed into a community context: studying became inquiry, learning turned into learning 'by doing', reflecting on life was real life itself¹². Consequently, Agosti's primary school was a direct expression of students' environment, in order to become a real 'popular school'. After all, Italian primary school continued to be the main – if not the unique – opportunity for working-class children to learn, in spite of the competition exercised by mass media (such as radio) under the monopoly of the Fascist regime.

The self-government experienced by Agosti's pupils was not regulated by the teacher, but by a schoolmate who, in that day, was appointed «regent». Being a «regent» meant being responsible for all educational activities promoted during that school day, with particular attention to their disciplinary and organizational dimensions. The «regent» was never chosen by the teacher, but each student had the opportunity to become «regent», thanks to a system of daily shifts.

The «regent» stayed at the centre of the classroom, near the teacher desk, to carry out his duties: he announced, directed and evaluated the preliminary operations at the beginning of the morning¹³. Then, he announced each lesson and summed up it. Finally, he wrote a short paper about the events happened all day long in order to increase the *Cronaca della giornata scolastica scritta dai ragazzi*, a report of the school day written up by students¹⁴.

Every school day had an internal organization¹⁵. In the first half-hour, pupils carried out the preliminary operations in form of 'actions of life' – some of

¹¹ F.W. Foerster, *Il vangelo della vita. Libro per ragazzi e ragazze*, [1904], Ital. transl. by A. Agazzi, Brescia, La Scuola, 1957.

¹² Magister, *Una scuola I. Ritmo della giornata scolastica*, «Supplemento Pedagogico a Scuola Italiana Moderna», n. 1, 1933, pp. 18-19, in particular p. 18.

¹³ Magister, *Una scuola II. Dal ritmo giornaliero al ciclo settimanale del lavoro scolastico*, «Supplemento Pedagogico a Scuola Italiana Moderna», n. 19, 1934, pp. 73-77, in particular p. 74.

¹⁴ R.D. October 1st, 1923, n. 2185, *Programmi di studio e prescrizioni didattiche per le scuole elementari. Ordinamento dei gradi scolastici e dei programmi didattici dell'istruzione elementare*, point 8), third class.

¹⁵ Magister, *Una scuola I. Ritmo della giornata scolastica*, «Supplemento Pedagogico a Scuola Italiana Moderna», cit., pp. 18-19.

them were required by Lombardo Radice's programmes¹⁶: muster; cleanliness inspection; entrance and preparation of writing materials; communications; self-roll call with some considerations about absentees and school mates coming late, using a dedicated card file; meditation and prayer; weather observations; annotations on the *quaderno per le comunicazioni scuola-famiglia*, a notebook to promote a further connection between school and family; homework control¹⁷. Then, they attended three lessons (Religion; Italian and History; Arithmetic and Geometry), with a short break between the second and the third. During the interval, pupils spend their time in activities in the school garden, such as outdoor games, short march and Physical Education exercises.

Students went home for lunch. In the afternoon, they came back to school, starting with a second muster and a brief moment dedicated to communications about class 'collections'. Then, they attended other two lessons (Arts or the *Ora dei bambini*; Geography and Sciences). The school day finished with a «continuous reading», waiting for the sound of school bell¹⁸.

For the teacher, the daily school time had two main purposes: the respect of pupils' different level of learning during the various school hours and the safeguard of a unity of the school subjects¹⁹. The daily «rhythm» of the lessons belong to a cyclic process, gradually wider (weekly, monthly, quarterly, annual), organized by the teacher according to the principle of flexibility. Consequently, the *Regents' System* could allow the realization of a close connection between logical aspects (concerning school matters) and psychological aspects (concerning students), as stated in the best experiences of active schools.

The annual themes were chosen by Agosti in order to improve the harmony between school and the external environment. For this reason, he proposed topics such as home, school, city, life around the city and the nation. They were similar to those illustrated in Lombardo Radice's works²⁰, a well-known author to the pedagogical group grown around «Scuola Italiana Moderna», thanks to the mediation of Vittorino Chizzolini²¹.

For pupils, on the other hand, the daily school time represented a sort of «living school time»²², because its articulation depended on the memory,

¹⁶ R.D. October 1st, 1923, n. 2185, *Programmi di studio e prescrizioni didattiche per le scuole elementari. Chiarimenti relativi all'orario*, point 5).

¹⁷ Magister, *Una scuola I. Ritmo della giornata scolastica*, «Supplemento Pedagogico a Scuola Italiana Moderna», cit., p. 19.

¹⁸ *Ibid.*

¹⁹ Magister, *Una scuola II. Dal ritmo giornaliero al ciclo settimanale del lavoro scolastico*, «Supplemento Pedagogico a Scuola Italiana Moderna», cit., p. 73.

²⁰ Lombardo Radice, *Lezioni di didattica e ricordi di esperienza magistrale*, cit., p. 206.

²¹ Todeschini, *I maestri e la scuola del popolo. Vittorino Chizzolini a 'Scuola Italiana Moderna' (1929-1958)*, in Damiano (ed.), *La centralità dell'amore. Esplorazioni sulla pedagogia di Vittorino Chizzolini*, cit., pp. 54-57.

²² Magister, *Una scuola II. Dal ritmo giornaliero al ciclo settimanale del lavoro scolastico*, «Supplemento Pedagogico a Scuola Italiana Moderna», cit., p. 74.

attention and involvement of the «regent», who should behave as the «dean» of the class and increase the collaboration of all class mates, assist teacher during the different lessons with specific assignments. As Eugène Dévaud, Marco Agosti attached great relevance to the community nature of learning, without forgetting to give a proper attention to the strategies of individualization, which were promoted in a lot of active school experiences, such as the *Dalton Plan* of Helen Parkhurst²³.

In spite of his attempts of innovation, Agosti couldn't avoid his students from learning and sharing fascist ideals, summed up in four main principles: the respect for Catholic religion; the undertaking of a heroic life concept; the centrality of human person, strictly connected to the social group of belonging; an idea of State as immanent conscience of nation²⁴. Agosti wanted to achieve them through a Catholic conception of «co-operation among souls that, thanks to their shared origin and nature, participate to a unique spiritual life, realizing human fraternity»²⁵.

First of all, this choice allowed Agosti to express his disappointment towards the neo-idealist concept of State as expression of the Absolute Spirit. Secondly, Agosti was far from the typical 'vitalism' of the contemporary experiences of *Balilla*, because he considered Activism as a tendency to restore an interior balance between thought and action in the development of human character.

In those terms, Agosti shared the reflections of two authors, well known by the readers of «Scuola Italiana Moderna» thanks to the mediation of Vittorino Chizzolini: Friedrich Wilhelm Foerster and father Martin Stanislas Gillet. The first one was a German not Nazi educationalist, who emphasized the importance of a school aimed at students' moral growth. The second one taught Pedagogy at the Catholic University of Lovanio and had a particular attention for the development of character in young people, as a possible answer to contemporary difficulties.

²³ V. Chizzolini, *Esame delle principali correnti attuali della scuola attiva dal punto di vista cattolico*, in *La moralità professionale: settimane sociali d'Italia*, XVIII sezione, 1934, Padova, Milano, Vita e Pensiero, 1937, pp. 331-332.

²⁴ M. Agosti, *La nostra scuola. I programmi d'insegnamento e l'anima dell'educazione nazionale. Note di orientamento per la preparazione alla prova scritta dei concorsi magistrali e direttivi*, Brescia, La Scuola, 1933, p. 29. See also: Id., *I principî affermati ed attuati dal Fascismo nel campo dell'educazione*, Brescia, La Scuola, 1935.

²⁵ M. Agosti, *La nostra scuola. I programmi d'insegnamento e l'anima dell'educazione nazionale. Note di orientamento per la preparazione alla prova scritta dei concorsi magistrali e direttivi*, cit., p. 203 [my translation].

2. A «lingua-vita» for the development of a national conscience

Agosti could realize his educational plan because, since the beginning, he recognized a strategic role to school matters, as valid aids to innovate educational and methodological processes. The *Regents' System* represented, in fact, the achievement of two different purposes: the education of good fascist men/citizens/producers and the promotion of theoretical and methodological researches in Educational Sciences. Those aims were in contrast both with Gentile's concept of Didactics and with the 'romantic' excess of spontaneity shown by numerous examples of active schools. In other words, the *Regents' System* was, in fact, a model of «school-laboratory», promoted through the pages of «Supplemento pedagogico a Scuola Italiana Moderna», in order to support a pedagogical renewal in Italy²⁶. This process also involved a political level, because during the Thirties Italian primary schools suffered a progressive spread of Fascism, with the introduction of a single State approved text in 1929 and the revision of programmes in 1934²⁷.

Agosti and Chizzolini acknowledged Fascism, but from the beginning they realized a school 'for' and 'of' human person. In those terms, their school couldn't be reduced to a mere tool in the hands of Fascist regime to educate a new mankind²⁸.

Italian was one of the most involved school matters, because it could be taught to develop a national and fascist conscience in each child. «Language is expression of the national conscience and learning a language means living in function of the Nation's life in its tradition and modernity»²⁹. In fact, the Italian language contains a patrimony of ideas shared by all Italians. In this sense, it was important to overcome the use of vernacular expressions, though remaining close to the everyday experience of most students. For this reason, Agosti introduced some particular didactic strategies, in order to make Italian a *lingua-vita*, a sort of 'living language' for his pupils, so that they could *vivere il vero* discovering the truth of life, as explained by Dévaud's theory of the *école affermatrice de vie*³⁰.

²⁶ [s.n.], *Ai lettori*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 1, 1933, p. 1.

²⁷ M. Ostenc, *La scuola italiana durante il fascismo*, [1980], Ital. transl., Bari, Laterza, 1981, pp. 60-100; J. Charnitzky, *Fascismo e scuola. La politica scolastica del regime (1922-1943)*, [1994], Ital. transl., Firenze, La Nuova Italia, 1996, pp. 138-155.

²⁸ L. La Rovere, «Rifare gli italiani»: *l'esperimento di creazione dell'«uomo nuovo» nel regime fascista*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 9, 2002, pp. 51-57.

²⁹ M. Agosti, *La lingua nella vita del fanciullo e nella scuola*, Brescia, La Scuola, 1939, p. 22 [my translation].

³⁰ E. Dévaud, *La scuola affermatrice di vita*, [1938], Ital. transl., Brescia, La Scuola, 1950. Dévaud was considered by Agosti and Chizzolini a reference point for the readers of «Supplemento pedagogico a Scuola Italiana Moderna», because he emphasized the tradition of popular education, such as the *école paysanne* in Friburgo. They were convinced that only an Italian primary school – similar to the model of the *école paysanne* – could promote a full development

Describing the teaching of Italian promoted by the *Regents' System* means describing the core of the entire system, because the *lingua vita* was a genuine and spontaneous expression of school life³¹. Agosti was conscious that most pupils had been speaking only a local dialect since their birth. It was important to put them in conditions of expressing themselves spontaneously and taking their own genuine expressions as contents of all the different moments of school life³².

He decided to transform his class in a real 'linguistic' environment, in which pupils were left free to translate their needs, desires, feelings, will, gesture in terms of the Italian language. For him, language was the equivalent of *lógos*, according to the Aristotelian-Thomist perspective. In this sense, the introduction of *metodo naturale*, a new methodology based on the promotion in each child of the most natural way of learning, allowed Agosti and his students to preserve the spontaneity of their expressions, also the vernacular ones. Moreover, this method did not risk to waste at school the patrimony of knowledge connected with the familiar environment of children, as recommended by Giuseppe Lombardo Radice into his *Lezioni di didattica e ricordi di esperienza magistrale* (1913) and in the programmes for primary school he drawn up in 1923³³.

The use of *metodo naturale* to teach Italian allowed Agosti to propose some simple exercises of translation from local dialect to Italian and *vice versa*, realized in the classroom in a playful manner³⁴. This was his answer to the excess of rhetoric emphasized by the traditional way of teaching Italian³⁵.

of human conscience and a vocation to work, far from Liberalism and Marxism (see: Orizio, *Il 'Supplemento pedagogico'. L'attivismo cristiano nel panorama internazionale, temi e protagonisti*, in Damiano (ed.), *La centralità dell'amore. Esplorazioni sulla pedagogia di Vittorino Chizzolini*, cit., p. 125).

³¹ See: *Contributi d'esperienza educativa e critica didattica. Quaderno 1 – La formazione linguistica del fanciullo italiano*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 1, 1935; M. Agosti, *La lingua nella vita del fanciullo e nella scuola*, Brescia, La Scuola, 1939; Id., *Verso la scuola integrale. (Il sistema italiano dei reggenti)*, cit., pp. 69-126.

³² Agosti, *La lingua nella vita del fanciullo e nella scuola*, cit., pp. 13-46.

³³ See: Lombardo Radice, *Lezioni di didattica e ricordi di esperienza magistrale*, cit., pp. 182-185; R.D. October 1st, 1923, n. 2185, *Programmi di studio e prescrizioni didattiche per le scuole elementari. Ordinamento dei gradi scolastici e dei programmi didattici dell'istruzione elementare*, art. 8, point 4). Agosti was influenced by Lombardo Radice's thought, even if he was not a neo-idealist like him, because the Sicilian scholar was an author of great relevance for the editorial staff of «Scuola Italiana Moderna». In fact, he had had direct contacts with Vittorino Chizzolini and Angelo Colombo (who was a former member of *Gruppo d'Azione per le Scuole del Popolo*). Furthermore, some of his disciples, such as Francesco Bettini, Riccardo Dal Piaz and Giorgio Gabrielli, began an assiduous collaboration with La Scuola Publishing House (see: G. Chiosso, *Il rinnovamento del libro scolastico nelle esperienze di Giuseppe Lombardo Radice e dei 'lombardiani'*, «History of Education and Children's Literature», vol. 1, n. 1, 2006, pp. 127-140).

³⁴ Agosti, *La lingua nella vita del fanciullo e nella scuola*, cit., pp. 103-104.

³⁵ Lombardo Radice, *Lezioni di didattica e ricordi di esperienza magistrale*, cit., pp. 242-243.

A direct teaching of language, that is a reflected action of the teacher aimed at the formation of a linguistic conscience, starts from this: making the spontaneous expression possible as a speaking exercise, he takes it as content of his direct teaching, so that the interior law of language shows itself to be an intimate law of thought and reality³⁶.

The *lingua vita* had nothing to do with chattering, repeating passively, adorning or, even, lying, because it was aimed essentially at the formation of a linguistic conscience, even if all school subjects contributed to improve it³⁷. In fact, the direct involvement of children in structured conversations, in different typologies of reading (artistic, explained, silent, free), in the research and production of objects for the collections offered them good occasions for speaking³⁸.

Reading was another activity particularly appreciated by Agosti, who considered it the best *viaticum* for working-class children, after Religion³⁹. For this reason, he made a *bibliotechina di classe* (a small library in the classroom) available to all his pupils, in order to allow them to read a wide number of books, in addition to the single state approved text. Those 'books' were built directly by Agosti himself, filling in dedicated binders some pages kept from children books or magazines, with a leaf reporting four or five questions to evaluate their skills in written comprehension.

Where was the originality of Agosti's contribution to the teaching of Italian? It should be recognized that he experimented various forms of linguistic teaching – suggested firstly by Lombardo Radice – through innovative community activities of research and reflection, with the active participation of all students. An example of this new way of teaching was the implementation of the *vocabolario di classe*⁴⁰, a small vocabulary built as a card index with moving leaves, useful to collect notes about the new words discovered during class conversations. Each word had a short explanation, with grammatical, conceptual and aesthetic definitions, written and updated in autonomy by pupils.

³⁶ Agosti, *La lingua nella vita del fanciullo e nella scuola*, cit., p. 108 [my translation].

³⁷ R.D. October 1st, 1923, n. 2185, *Programmi di studio e prescrizioni didattiche per le scuole elementari. Chiarimenti relativi all'orario*, point 3).

³⁸ *Ibid.*, art. 9, point 6).

³⁹ See: M. Colin, *I bambini di Mussolini. Letteratura, libri, letture per l'infanzia sotto il fascismo*, Brescia, La Scuola, 2012, pp. 79-103, 133-190, 225-260.

⁴⁰ Agosti, *La lingua nella vita del fanciullo e nella scuola*, cit., pp. 102-103.

3. *An innovative proposal to teach History: the 'storia elementare'*

Agosti recognized to History a leading role as Italian, so he conceived the possibility of teaching a *storia elementare*⁴¹. It was not a reduction of History *ad usum puerorum*, but the knowledge of the essential dimensions of historical development, grasped in their concrete forms, in order to improve the individual and national education.

Agosti's *storia elementare*⁴² was an alternative proposal to Lombardo Radice's *storia poema*⁴³. Lombardo Radice took inspiration from Giambattista Vico's concept of *popolo bambino*. Agosti, instead, elaborated an epistemological reflection about teaching History in primary school starting from the principle of concreteness, which did not reduce History to a mere enumeration of facts or characters⁴⁴. Concreteness was at the basis of all teaching processes in the *Regents' System*, because it allowed pupils to begin self-learning processes, with unexpected results. In spite of the divergences, both of them agreed with the necessity of offering students, since childhood, some occasions to learn the main characteristics of historical development.

Agosti's students started studying the *storia elementare* writing their own autobiography, with the use of various interconnected narrative forms. Moreover, the teacher suggested them to write a daily personal diary and, contemporary, to increase the *Cronaca della giornata scolastica scritta dai ragazzi*. It was important to show them the difference between a personal narration of a fact, such as a diary, and an impersonal narration of the same fact, such as a report. The first was more detailed and sensitive of the second, too often reduced to a boring and insensitive composition at school.

But if it is easy to guide pupils (we are out of exceptional cases that there can be in every school) to identify a fact in which they have been protagonist, it is not so simple to make them express that particular effect that other scholastic actions have been on their sentiment, first of all the lessons. However, the report, by removing what is a raw external fact and helping to identify, simplifies sometimes the process of introspection⁴⁵.

The comparison between diary and report put students in front of the connection between the categories of particular/concrete and generic/abstract, useful to express spontaneously their own personal history in a linguistic form.

⁴¹ Magister, *Una scuola V. Insegnamento della storia ed educazione nazionale*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 12, 1934, pp. 12-16, in particular p. 13.

⁴² Magister, *Una scuola VI. Insegnamento della storia e formazione della coscienza nazionale*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 35, 1935, pp. 89-90.

⁴³ Lombardo Radice, *Lezioni di didattica e ricordi di esperienza magistrale*, cit., pp. 351-352.

⁴⁴ Magister, *Una scuola VI. Insegnamento della storia e formazione della coscienza nazionale*, «Supplemento pedagogico a Scuola Italiana Moderna», cit., p. 90.

⁴⁵ Agosti, *La lingua nel fanciullo e nella scuola*, cit., p. 91 [my translation].

In this way, they were in conditions of understanding – in first person – to be ‘actors’ of History and – at the same time – ‘small historians’.

For Agosti, History was the field in which every man could act. Consequently, studying History was the same as educating oneself – as a good citizen – to understand and act History⁴⁶. The composition of an own autobiography helped children to rewrite, gradually, their family history and the histories of the municipality, region and homeland, with an in-depth analysis of the respective institutions.

From a didactic point of view, Agosti led his pupils to distinguish fantasy from reality, giving them some tasks of observation of their environment, strictly connected both to the contents of the lessons and to the events narrated in their personal diaries. In this manner, they could mature a historical conscience in the double meaning of History as *res gestae* (direct experience, life) and History as *historia rerum gestarum* (the History properly told, understood by children only in proportion of their own experience)⁴⁷.

The main motor of this process was an active research of news, documents, relics and other sources of knowledge referred to a specific event or character, in order to develop in each pupil a habit to ‘interrogate’ the past in order to understand the present⁴⁸. Every day, Agosti supported the natural attitude of his pupils to report on news, inviting them to do the same with their schoolmates, telling about heroic acts, charities, celebrations, commemorations, discoveries etc. They should put attention to the sources (radio, newspapers, magazines, eye witnesses etc.) and show suitable materials (cut out, posters, photos, pictures, personal correspondence etc.).

The favourite events quoted by children were the ‘war stories’ told by the living voice of their fathers and reported, in a narrative form, to the school mates and teacher, with evocative titles such as: *Vita di un soldato in guerra*, *Partenza per il fronte*; *Cuore di soldato*; *La prigionia*⁴⁹.

How many glimpses, rich of human contents: those people crying while looking at a son embracing his parents perhaps for the last time; that mechanic who did not want to accept the hire; that captain who tore up the «paper of deserter»... And what historian could give you so directly the drama, lived by millions of sons of our country, between native love for home and naïve sense of duty, without tragedy, but in a firm and secure way? One child reports an episode that confirms another characteristic of the soldier: goodness. Indeed, the guy, in his opinion, considers this domestic goodness, courageous until heroism, as a virtue,

⁴⁶ M. Agosti, *La formazione della coscienza storica del fanciullo. Storia, vita, scuola (Nota introduttiva)*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 29-30, 1936, p. 121.

⁴⁷ Magister, *Una scuola V. Insegnamento della storia ed educazione nazionale*, «Supplemento pedagogico a Scuola Italiana Moderna», cit., p. 12.

⁴⁸ *Ibid.*, p. 13.

⁴⁹ *Ibid.*, pp. 15-16.

proper of the soldier. [...] What historical narration can have the educational value of this example? No shadow of *miles gloriosus*: «dad has told it»⁵⁰.

Documents, relics and other materials recovered by pupils were, also, classified into ‘historical collections’, useful to mature a historical conscience of the nation building processes.

The ‘historical collection’ could be considered as the introduction to visits to museum, soldier’s home, remembrance park, war memorial and other historical places: a fragment of cornices is Roman; a castle with crenellated towers, loopholes and drawbridge; a foxhole, a cemetery as living memory of those who died for their own Country, ‘talk’ to children the suggestive language of past things and sacred memories⁵¹.

A gravestone with the names of soldiers dead in a war, a barbed wire with a shred of soldier uniform and the laying of a laurel crown in front of a war memorial could substitute and, even, overcome the educational value of the most detailed textbooks. In fact, the cult of dead soldiers represented «an essential chapter of the process of new child masses nationalization»⁵². For this reason, children were directly involved into the continue process of Italian national building, through their participation to public ceremonies of commemoration and visits at war memorials.

Agosti gave to History more relevance than Lombardo Radice’s programmes for primary school (1923) and the following revision introduced by Minister Cesare De Vecchi in 1934. *Magister*’s choice was influenced both by his nationalistic ideas, which inspired his juvenile experience as cavalry officer in the Italian army, and by his Catholic conception of History⁵³. The faith in Providence and the consciousness of its value as an operating reality in History could promote the formation, in each child, of a historical conscience. For this reason, teachers should work in harmonic collaboration with family and Church, according to a subsidiary perspective typical of the Catholic popular movement born in Brescia between the end of the 19th century and the beginning of the 20th century⁵⁴. This ideal had been shared by all editorial staff of «Scuola Italiana Moderna», since its origins. There were clear references to the more recent statements of the encyclical *Divini Illius Magistri*, related to the role of Religion in giving children «a concept of life and a purpose of History». Consequently, History became a point of convergence of all school subjects in

⁵⁰ *Ibid.*, p. 16 [my translation].

⁵¹ *Ibid.* [my translation].

⁵² A. Gibelli, *Il popolo bambino. Infanzia e nazione dalla Grande Guerra a Salò*, Torino, Einaudi, 2005, p. 200.

⁵³ Scurati, *Scuola del popolo e professionalità magistrale in Marco Agosti*, in Cattaneo, Pazzaglia (edd.), *Maestri, educazione popolare e società in «Scuola Italiana Moderna», 1893-1993*, cit., pp. 390-391.

⁵⁴ *Magister, Una scuola V. Insegnamento della storia ed educazione nazionale*, «Supplemento pedagogico a Scuola Italiana Moderna», cit., p. 12.

the *Regents' System*, because all life experiences provided for the formation of a historical conscience⁵⁵.

Finally, it's important to underline the lack, in Agosti's plan, of strong references to Italian colonialism and imperialism, especially during the second half of the Thirties. This choice could be justified, from a pedagogical point of view, with a clear sharing of Eugène Dévaud's perspective. He supported a way of teaching History, Language, Geography and all school subjects starting from the environment of children, also with a peculiar attention to local implications. This method was considered reductive by Aldo Agazzi, that defined it as *villagismo*⁵⁶, while Marco Agosti considered it essential.

4. *Original and innovative features of the Regents' System*

Since the beginning, the *Regents' System* had shown some original and innovative features, that distinguished it from contemporary Italian experiences of active schools («Montesca» School in Città di Castello, «Rinnovata» School in Milan, «Franchetti» School in Rome etc.). They contributed, in a decisive manner, to its survival during the years, also after the crisis and defeat of Fascism.

The first characteristic concerned the creation of an educational context aimed at developing mutual interpersonal interactions among all pupils. In this manner, the teacher was able to improve those forms of «group psychology», necessary to promote social relations, full human person development and educational actions of high quality⁵⁷. Consequently, they produced a transformation from an «atomist» class to a «community» class, where pupils, in turn, were charged with some tasks, in order to become protagonists of the organization and functioning of their class⁵⁸. The assignments promoted the psychological proximity between students and the sharing of common purposes. Although they were fostered by the teacher, they were not decided by him such as in the *Sistema a squadre*, a «teams' system» experimented by Mario Mazza at «Leopoldo Franchetti» School in Rome⁵⁹, on the basis of his past scouting experience and with explicit references to *Balilla*. Agosti, instead,

⁵⁵ Magister, *Una scuola VI. Insegnamento della storia e formazione della coscienza nazionale*, «Supplemento pedagogico a Scuola Italiana Moderna», cit., p. 97.

⁵⁶ Letter by Aldo Agazzi to Vittorino Chizzolini, Bergamo, January 24th, 1937, p. 5, conserved at Archivio per la Storia dell'Educazione in Italia, ASE, Università Cattolica del Sacro Cuore di Brescia, Fondo Aldo Agazzi, Corrispondenza 1937.

⁵⁷ Agosti, *Il sistema dei reggenti. (Verso la scuola integrale)*, cit., p. 16.

⁵⁸ Magister, *Una scuola III. Dagli incarichi al lavoro libero*, «Supplemento pedagogico a Scuola Italiana Moderna», 26, 1934, pp. 111-114.

⁵⁹ M. Mazza, *Disciplina della squadra balilla*, Brescia, La Scuola, 1941, pp. 87-90.

let his students choose freely the assignments, according to their interests and attitudes. In this way, they could develop a form of structured collaboration that, on the one hand, overcame the 'romantic' and spontaneous first stage of Activism and, on the other hand, opened the way to the *lavoro libero*, a sort of 'free work' realized by pupils in total autonomy in the last hour of their school day.

During *lavoro libero*, students analyzed an issue suggested in the annual programme, working individually or in a small group. They could use didactic aids, card indexes, relics and other tools provided in a dedicated corner of the class, managed by a specific «students' corporation». There was the corner of «engineers' corporation», the corner of «historians' corporation», the corner of «artists' corporation» etc.

The 'free work' can concern any school subjects and it usually refers to a centre of interest, common to all school. For example, do we study the school building? Here it is the corporation of «engineers» that has much work to do to find information, to measure, to solve problems; in the meantime, the corporation of «historians» reads historical reports, proposes interpretations of some relics, looks for old and recent news; while the «artists» draft or indulge themselves in descriptions⁶⁰.

In Agosti's intents, each assignment should become itself an out-and-out duty, thanks to the gradual development of a sense of obligation, that made each pupil feel – from a moral point of view – the necessity of acting well and responsibly into the small community of the class.

The second original characteristic of the *Regents' System* was the promotion of *educazione integrale*, a full human person education, in a school context which could safeguard its best realization for at least two reasons. Firstly, all human person's needs (physical, expressive, rational, economic, social, ethic, religious etc.) were satisfied into the class, through a lot of spontaneous activities and a serene cohabitation. Secondly, Agosti's students could really live the ideal of *centralità dell'amore*⁶¹, because they were strictly united to each other and to the teacher by a reciprocal and mutual relationship, that guided them to share common aims and to use didactic aids in a cooperative manner.

In this way, the experimentation of a community life – based on a Catholic fraternal solidarity – allowed pupils to develop an own social conscience and, at the same time, acquire good habits for human cohabitation and civil life. As already said, the experience of self-government got Agosti's students ready for

⁶⁰ Magister, *Una scuola III. Dagli incarichi al lavoro libero*, «Supplemento pedagogico a Scuola Italiana Moderna», cit., p. 111 [my translation].

⁶¹ Chizzolini's *centralità dell'amore* was characterized by three qualities: generativity, generosity, relatedness (see: Giuseppe Bertagna, *Vittorino Chizzolini «pedagogista»*. *Per una critica teologica della ragione pedagogica*, in Fondazione Giuseppe Tovini, a cura di, *Vittorino Chizzolini educatore. Un bresciano protagonista dello sviluppo della scuola italiana*, cit., pp. 47-58).

learning the essential rhythms of discipline and order, in a class transformed into a small *polis*⁶².

The third main characteristic of the *Regents' System* referred to Religion as «fundament and successful completion of education» in primary school. This concept was not the same as Religion as *philosophia minor* supported by Giovanni Gentile, because it was related to the Catholic conception expressed both into the *Concordato* between the Italian State and Christian Church (1929) and into the encyclical *Divini Illius Magistri* (1929). In fact, Religion represented a sort of «complementary framework» in the *Regents' System*, towards which the educational results of all school subjects and the ideals of unity, independence and freedom – typical of the Italian *Risorgimento*⁶³ – are collected in a unitary sense. Its main purpose was the education of «the honest citizen and the good Christian», according to what many Catholic educators, such as S. Giovanni Bosco, recommended also during the *Risorgimento*⁶⁴.

The fourth characteristic concerned the construction of a narrow connection between the moral-religious education and the development of a national conscience as a *conditio sine qua non* to promote a full education of human person⁶⁵. The Catholic ideal of human fraternity under the common celestial fatherhood – expressed by pope Pio XI into the encyclical *Quadragesimo Anno* (1931) – was taken by Agosti as a religious premise for a process of national education⁶⁶. The development of child's character should be pursued according to the full development of his familiar, social and national conscience⁶⁷. For this reason, he decided to organize his class on the basis of the corporative scheme, because he considered corporation as an «anti-individualistic and anti-communistic method of social organization»⁶⁸. Its economical and juridical dimensions, emphasized by Aldo Agazzi⁶⁹, were only an aspect of a more complex organization.

⁶² Agosti, *Il sistema dei reggenti. (Verso la scuola integrale)*, cit., p. 19.

⁶³ M. Agosti, *Educazione religiosa e educazione nazionale*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 1, 1933, p. 8.

⁶⁴ See: P. Braido, «Buon cristiano e onesto cittadino». *Una formula dell'«umanesimo educativo» di don Bosco*, «Ricerche storiche salesiane», n. 1, 1994, pp. 7-75.

⁶⁵ See: R. Pertici, *Chiesa e Stato in Italia. Dalla Grande Guerra al nuovo Concordato (1914-1984)*, Bologna, Il Mulino, 2009, pp. 147-149.

⁶⁶ Agosti, *La nostra scuola. I programmi d'insegnamento e l'anima dell'educazione nazionale. Note di orientamento per la preparazione alla prova scritta dei concorsi magistrali e direttivi*, cit., p. 24.

⁶⁷ M. Agosti, *L'anima religiosa dell'educazione nazionale*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 12, 1936, pp. 11-14.

⁶⁸ M. Agosti., *Riflessi di vita corporativa nella scuola*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 14, 1938, pp. 46-51, in particular p. 47.

⁶⁹ A. Agazzi, *Educazione corporativa*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 14, 1938, pp. 39-45. This was an intervention of Aldo Agazzi in disappointment with Marco Agosti and his conception of corporatism. A backstage of the episode could be found in the correspondence of Aldo Agazzi: letter by Aldo Agazzi to Vittorino Chizzolini, Bergamo, December 1st, 1937; letter by Aldo Agazzi to Marco Agosti, Bergamo, January 3rd, 1938; letter by Aldo

The corporatism experimented by Agosti with the *Regents' System* was conceived as a principle of moral, political and economic unity of the nation and a «third way» between individualism and collectivism⁷⁰. He combined this full and unitary perspective of life and human person with an idea of nation as a «big family», originated during the *Risorgimento* and revalued by the Catholic popular movement at the beginning of 20th Century. Consequently, Agosti interpreted corporation as a «big family», where the harmonic collaboration of people in the production and their solidarity in the division of wealth were aimed at their own physical and moral improvement.

In Agosti's class there were different corporations, each of them with a specific assignment to be achieved for the advantage of the entire community. The *Corporation of Press* had various tasks: the organization of the *bibliotechina di classe*, the collection of magazines and journals, the editing of the school paper, the collection of pictures for the albums of History, Geography and Religion. The *Corporation of Science*, instead, was involved in some activities concerning the installation of collections, the weather observations (on the basis of the model followed at «Montesca» School⁷¹, then illustrated in the programmes of 1923) and simple scientific experiments. The *Corporation of Arts* was composed of little singers, orators, students particularly gifted in expressive reading and acting, little illustrators and decorators, pupils passionate about flowers and, generally, all children inspired by the Muses or Flora. They organized the *Ora serena*, a «quarterly intimate school party, in which they presented the result of Arts teaching, such as expressive reading, narration, declamation, acting, music, singing, art exhibition, samples of drawing, building and shaping»⁷². The *Ora serena* had direct references to the *Accademia del mattino*, experienced by Maria Boschetti Alberti's pupils at «Agno» School some years before⁷³.

Agazzi to Marco Agosti, March 28th, 1938, conserved at Archivio per la Storia dell'Educazione in Italia, ASE, Università Cattolica del Sacro Cuore di Brescia, Fondo Aldo Agazzi, respectively Corrispondenza 1937 and Corrispondenza 1938. See also: L. Pazzaglia, *Dalle prime esperienze d'insegnante all'impegno per le riforme scolastiche*, in C. Scurati (ed.), *Educazione società scuola. La prospettiva pedagogica di Aldo Agazzi*, Brescia, La Scuola, 2005, pp. 25-30.

⁷⁰ Agosti, *Riflessi di vita corporativa nella scuola*, «Supplemento pedagogico a Scuola Italiana Moderna», cit., p. 50. For this concept of corporatism, see: G. Santomassimo, *La terza via fascista: il mito del corporativismo*, Roma, Carocci, 2006; A. Gagliardi, *Il corporativismo fascista*, Bari, Laterza, 2010.

⁷¹ Lombardo Radice, *Athena fanciulla. Scienza e poesia della scuola serena*, cit., pp. 29-31.

⁷² Magister, *Una scuola IV. Insegnamenti artistici*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 34, 1934, pp. 137-142, in particular p. 141.

⁷³ Maria Boschetti Alberti started teaching at «Agno» School in 1925, after the end of her first experience of didactic innovation at «Muzzano» School. A first paper about *scuola serena*, addressed to Adolphe Ferrière, was published with the title *L'école sereine d'Agno* in the magazine «L'Adula», during the academic year 1926-1927. Then, it was reprinted as a small pamphlet in 1928. The first Italian-language edition was published by Aldo Agazzi in 1951 at La Scuola Publishing House.

Agosti emphasized the same principles of unitary and cooperative collaboration to understand the new role assigned to Italian primary school by the *Carta della Scuola*, introduced in 1939 by the Minister of National Education Giuseppe Bottai. For the first time, Italian primary school was organized as an *arbeits schule* and had a different structure from the *scuola serena* exalted by Lombardo Radice in the programmes of 1923. Although those important changes, Agosti identified in his school the presence of some issues introduced by Bottai's reform. In particular, he recognized the integrative function of school as «first fundament of solidarity among all social forces» and «point of connection among all educational activities»⁷⁴ (1st statement, *Carta della Scuola*). He agreed with Bottai's planning of the educational system, because it was inspired by a unitary principle.

The three spheres of 'human', 'political-military' and 'professional' culture merged together, into a unique purpose: learning considered as development of maturity. At school level, it was expressed by integrating working-class people not only in political and military life, but also in the manufacturing, corporative and self-sufficient life of the Italian empire. [...] School educated the 'man', through the collaboration of family; it educated the 'citizen-soldier' borrowing the model of the fascist education promoted by GIL; it educated the 'producer' in strict connection with his corporation⁷⁵.

5. Its 'validity' over the years

The outbreak of the Second War World and the following events compromised the realization of the *Carta della Scuola*, but not Agosti's experimentation, that went on until 1942, when he was relocated in order to manage the newborn *Centro didattico provinciale of Brescia*.

In April 1943, Agosti obtained a lecturing post in Pedagogy at the Catholic University of the Sacred Heart in Milan⁷⁶, where he taught at the Teachers' Training College, temporarily replacing Mario Casotti in the academic years 1943-44 and 1944-45. In that period, Agosti had also the chance to do a competitive exam to become Full Professor of Pedagogy, with the support of father Agostino Gemelli, who recommended him to prepare adequate scientific works⁷⁷. This opportunity vanished in the Second Postwar, for different reasons:

⁷⁴ Ministero dell'Educazione Nazionale, *La Carta della Scuola* [1939], annotated by M. Agosti, II ediz., Brescia, La Scuola, 1939, p. 27.

⁷⁵ *Ibid.*, pp. 26-27 [my translation].

⁷⁶ See the documents conserved in a dedicated folder, at Università Cattolica del Sacro Cuore, Direzione risorse umane, Serie fascicoli personale docente, posizione n. 11, prof. Marco Agosti.

⁷⁷ To reconstruct those events, it is important to analyze the letters of that period between Marco Agosti and father Agostino Gemelli and between the latter and Vittorino Chizzolini, conserved at Università Cattolica del Sacro Cuore, Archivio generale per la storia dell'Università

an unexpected illness; his temporary suspension from teaching, due to a process of cleansing for his past oath of allegiance to *Repubblica Sociale* of Salò⁷⁸; the return of Mario Casotti at the Catholic University.

Therefore, the *Regents' System* became immediately the object of a wide pedagogical and didactic research, whose results were spread both to the students at the Teachers' Training College of the Catholic University and to all readers of «Scuola Italiana Moderna». This was possible because the original and innovative characteristics of the *Regents' System* contributed to the safeguard of the pedagogical effectiveness of the *scuola integrale*, also in the thorny period of transition from Fascism to democracy. In particular, the pedagogical and methodological structure of the *Regents' System* was emphasized by the *Paedagogium-Istituto per gli studi sull'educazione cristiana*⁷⁹, a new research center opened by father Agostino Gemelli in 1942, thanks to the collaboration with Vittorino Chizzolini, Marco Agosti and other Catholic educators. *Paedagogium* considered the *Regents' System* as an effective model for the new Italian popular primary school of the postwar period.

This choice confirmed some historiographical theses, such as Giorgio Chiosso's⁸⁰ and Luciano Pazzaglia's⁸¹ ones, that focused on the existence of continuity – instead of discontinuity – in the Italian educational system between

Cattolica del Sacro Cuore, fondo Corrispondenza. See: letter by father Agostino Gemelli to Marco Agosti, August 8th, 1944 (b. 159, f. 283, sf. 2072); letter by Vittorino Chizzolini to father Agostino Gemelli, Brescia, December 19th, 1944 and letter by father Agostino Gemelli to Vittorino Chizzolini, December 21st, 1944 (b. 167, f. 298, sf. 2165); letter by Marco Agosti to father Agostino Gemelli, Brescia, January 25th, 1945 and letter by father Agostino Gemelli to Marco Agosti, Milan, February 5th, 1945 (b. 163, f. 291, sf. 2122); letter by Marco Agosti to father Agostino Gemelli, February 18th, 1945 and letter by father Agostino Gemelli to Marco Agosti, Milan, February 26th, 1945 (b. 162, f. 291, sf. 2122); letter by Marco Agosti to father Agostino Gemelli, Brescia, March 26th, 1945 and letter by father Agostino Gemelli to Marco Agosti, Milan, April 16th, 1945 (b. 163, f. 291, sf. 2123); letter by Marco Agosti to father Agostino Gemelli, June 4th, 1945 and letter by father Agostino Gemelli to Marco Agosti, Milan, June 21st, 1945 (b. 163, f. 292, sf. 2124); letter by Marco Agosti to father Agostino Gemelli, September 17th, 1945 and letter by father Agostino Gemelli to Marco Agosti, Milan, September 19th, 1945 (b. 163, f. 292, sf. 2127).

⁷⁸ Giorgio Rumi, *Milano cattolica nell'Italia unita*, Milano, NED, 1983, pp. 179-208 (in particular, Appendice I, p. 200).

⁷⁹ See: A. Gemelli, *Una iniziativa ricca di promesse per l'educazione cattolica: «Paedagogium»*, «Vita e Pensiero», n. 7, 1942, pp. 207-214; L. Caimi, *Il «Paedagogium»: l'Istituto per gli studi sulla educazione cristiana costituito presso la Università Cattolica del Sacro Cuore (1942-55)*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 2, 1995, pp. 237-271; V. Prandini, *Vittorino Chizzolini per il rinnovamento della scuola italiana. I convegni di Paedagogium*, quaderno n. 4, Brescia, Fondazione Giuseppe Tovini, 2008.

⁸⁰ G. Chiosso, *Cattolici e riforma scolastica. L'Italia nel secondo dopoguerra (1949-1951)*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla Legge Casati al Centro-Sinistra*, Brescia, La Scuola, 2001, pp. 416-417.

⁸¹ L. Pazzaglia, *Ideologie e scuola fra ricostruzione e sviluppo (1946-1958)*, in *Chiesa e progetto educativo nell'Italia del secondo dopoguerra, 1945-1958*, Brescia, La Scuola, 1988, pp. 497-498.

Fascism and Republic. Thanks to this line of continuity, a 'painless' transition from the fascist school to a new real democratic school could be achieved.

What school, if not Agosti's *Regents' System*, could have kept on offering an educational and social environment aimed at developing a democratic conscience in each child, especially in working-class pupils? The *Regents' System* could do it because Agosti had always put at the center of his school the single human person. According to this anthropological premise, the *Regents' System* had a universal educational purpose, valid in any political system. At school, all students could develop their «being», their moral «should be» and their educational «could be»⁸²; for this reason, they were all potential «regents» and nobody could not be kept out of the experimentation of a «traineeship of life and action»⁸³. Moreover, this premise could explain why in the reevaluation of the *Regents' System* – through Agosti's publishing and teaching activities – the substitution of the word «corporation» with the word «group» was happened naturally, without betrayals or misunderstandings⁸⁴. In those terms, the pedagogical and cultural operation conducted by Agosti and his colleagues was not an attempt of «lexical cleansing»⁸⁵, but the result of a long activity of research, developed into a «laboratory school» for years.

For the same reasons, the comparison between Agosti's school and the new issues illustrated into the new programmes for primary school, compiled in 1944 by a commission nominated by the Minister Vincenzo Arangio Ruiz, in agreement with the Military Allied Government, had been very profitable. Those programmes were extended to all Italian territory after the end of war (D.Lgt. May 21st, 1945, n. 549). For the first time, the practice of self-government of pupils was introduced in Italian schools. This innovation was strictly connected with John Dewey's thought: in fact, one of the compilers of the new Italian programmes was Carleton W. Washburne, a Dewey's disciple. His conception of self-government could find a validation in the local experimentation of Agosti, even if they had different anthropological, pedagogical and cultural references. In any case, the *Regents' System* proved to be adequate to satisfy the necessity of starting – through primary school – a process of national and civil renewal, in order to defeat the instrumental and spiritual illiteracy of most Italians.

⁸² Agosti, *Il sistema dei reggenti. (Verso la scuola integrale)*, cit., p. 24.

⁸³ *Ibid.*, pp. 21-25. The same meaning emerged from the reconstruction of a dialogue between Angela Agosti and his father Marco: «My father guided his pupils consciously to a democratic scheme, even if he knew their future will express the wider variety of *nuances*. [...] «Has anybody understood this hidden aim of your school?». «I don't know», he whispered» (see: A. Agosti Dabbeni, *Dialoghi col padre*, Roma, Anicia, 2003, pp. 95-98 [my translation]).

⁸⁴ Agosti, *Il sistema dei reggenti. (Verso la scuola integrale)*, cit., pp. 162-164.

⁸⁵ G. Bertagna, *Autonomia. Storia, bilancio e rilancio di un'idea*, Brescia, La Scuola, 2008, p. 127.

6. *The final re-launching with the Gonella Reform and the first Pietralba meetings*

The *Regents' System* was ultimately reintroduced during the Second Postwar, at the same time as the Gonella Reform. The Christian Democrat Guido Gonella was the first Minister of Public Education after the birth of the Italian Republic. To solve the numerous problems of the Italian school system, he decided to establish a National Commission, charged to conduct a National Inquiry for school reform (DM 12 April 1947). Marco Agosti and Vittorino Chizzolini took part in the sub-Commission for primary school reform⁸⁶: in this way, they could make their expertise available to the Italian school reform.

Their collaboration with the Ministry of Public Education was a propitious opportunity to present the *Regents' System* as an example of a new primary school, in which working-class pupils could improve their culture and acquire the main tools to achieve their social and political commitments. In this sense, the *Regents' System* could be a possible answer to the necessary transition to a 'real' democracy. As a lot of his contemporaries, Agosti considered the connection between schooling and democratic growth a sort of «fly-wheel» to start the long waited political, social and cultural reform of Italy⁸⁷.

In this perspective, the *Regents' System* could be appreciated for many reasons.

First of all, it veiled a new conception of school as *formazione sociale intermedia*, an entity that could promote the full development of human person (art. 2, Italian Constitution), in subsidiary collaboration with other *formazioni sociali intermedie*, such as families, Church, State⁸⁸.

Secondly, it recognized the centrality of Religion, as a source of a *paideia* based on the ideals of unity, moral independence and freedom, typical of the Italian *Risorgimento*. Their rediscovery was fundamental to support the process of moral, civil and material reconstruction of Italy, started during the Second Postwar. In particular, Agosti made reference to Vincenzo Gioberti's thought and to the Catholic educational tradition of the first decades of the 19th Century⁸⁹, in order to introduce a new connection between State and school, different from Gentile's and Bottai's ones.

Thirdly, the *Regents' System* could also be extended to preteens, anticipating the possibility of realizing – accordingly with the Italian Association of Catholic

⁸⁶ *Elenco dei membri delle sottocommissioni*, «La Riforma della Scuola», n. 2, 1948, p. 37.

⁸⁷ R. Sani, *La scuola e l'educazione alla democrazia negli anni del secondo dopoguerra*, in M. Corsi, R. Sani (edd.), *L'educazione alla democrazia tra passato e presente*, Milano, Vita e Pensiero, 2004, pp. 43-62.

⁸⁸ For this interpretation of the Italian educational system, see: Bertagna, *Autonomia. Storia, bilancio e rilancio di un'idea*, cit., pp. 43-45.

⁸⁹ G. Chiosso, *I cattolici e la scuola dalla Costituente al Centro-Sinistra*, Brescia, La Scuola, 1988, p. 86.

Teachers (AIMC) – a much sought post-primary triennium, aimed at providing the right of a free education for at least 8 years for working-class pupils, as ratified by the Italian Constitution (1948)⁹⁰. It was a realistic choice, because Agosti recognized that primary school continued to be the unique school for large part of the Italians. Frequently, many of them could not finish it, as demonstrated by the high levels of school negligence and illiteracy, especially in Southern Italy.

The *Regents' System* was also promoted through the magazines and meetings offered by La Scuola Publishing House to primary school teachers. For example, during the first summer meeting of Pietralba (1948)⁹¹, the *Regents' System* became the object of a pedagogical, didactic and epistemological reflection aimed at founding «modern Christian Educational Sciences»⁹². It was in Pietralba that the pillars of a research and experimentation process able to rediscover the origins of the *Regents' System* as «class-laboratory» were fixed, and pedagogical, psychological and methodological issues could be studied and analyzed. Moreover, Pietralba meetings contributed to the application of the *Regents' System* in a new historical and political context. In this sense, it is possible to understand why, in 1948, the *Manifesto di Pietralba* and *I sette punti per una scuola integrale* reproduced its main features⁹³, even if the *Regents' System* was born during the Fascist regime.

With the *Regents' System*, Agosti and Chizzolini kept on giving more importance to a new concept of educational relationship, conceived as an interpersonal relationship between teacher and pupils, based on the *centralità dell'amore*. This issue allowed them to overcome both Giovanni Gentile's *Actualism* and some naturalistic references of Activism. They emphasized the teacher's active role into learning processes, thanks to the development of his/her competence in teaching, defined as *maturità magistrale*⁹⁴. This thesis coincided with the hypothesis, formulated by the Gonella National Commission, to give primary school teachers the opportunity to work in one of the three types of Junior High School, in order to increase the extension of Italian schooling,

⁹⁰ R. Sani, «*Scuola Italiana Moderna*» e il problema dell'educazione popolare negli anni del secondo dopoguerra, 1945-1962, in Cattaneo, Pazzaglia (edd.), *Maestri, educazione popolare e società in «Scuola Italiana Moderna», 1893-1993*, cit., pp. 265-319.

⁹¹ V. Chizzolini, *Pietralba*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 1, 1948, pp. 109-112; *Pietralba. Itinerari e testimonianze*, Monographic issue of the journal «Scuola Italiana Moderna», n. 22, 1960; P. Pasotti, *Il gruppo pietralbino*, «Scuola Italiana Moderna», 18-supplemento, 1994, pp. 64-65; L. Monchieri, *Le attività di Scuola Italiana Moderna*, *ibid.*, pp. 76-80; F. De Giorgi, *Alla ripresa della vita democratica*, in Editrice La Scuola, 1904-2004, *Catalogo storico*, cit., pp. 60-68; L. Caimi, *Nell'Italia contemporanea*, *ibid.*, p. 70; E. Pasinetti, *L'attività di formazione*, *ibid.*, pp. 765-766.

⁹² V. Chizzolini, *Compito inesauribile*, «Supplemento pedagogico a Scuola Italiana Moderna», n. 1, 1948, pp. 4-5, in particular p. 5.

⁹³ *Pietralba: lettere e itinerari*, Brescia, La Scuola, 1956, pp. 13-17 e 19-20.

⁹⁴ M. Agosti, V. Chizzolini, *Maturità magistrale*, Brescia, La Scuola, 1959, pp. 11-13 e 22-26.

especially for working-class pupils. Those teachers could be the protagonists of a new popular school, aimed at satisfying the needs and the ideals of the Italian democratic society⁹⁵. For this reason, since October 1950 Agosti opened a new section of «Scuola Italiana Moderna», entitled *Differential didactic for post-primary schools* (*Didattica differenziale per la post-elementare*), with a lot of references to the original experience of the Regents' System.

Finally, it cannot be forgotten that the *Regents' System* influenced, although indirectly, the programmes for primary school proposed by Gonella's *Consulta Didattica Nazionale* (Didactics National Council) in 1951 and the following programmes issued by the Minister Giuseppe Ermini in 1955⁹⁶. Both of them were not drawn up by Marco Agosti and Vittorino Chizzolini, but they had similarities with the pedagogical perspective conveyed by «Scuola Italiana Moderna»⁹⁷. In fact, they emphasized a concept of primary school aimed at educating «essential capacities of the human person» and they also recognized the «Christian doctrine as fundament and successful completion of education»⁹⁸. Like Agosti's school, this new idea of school should combine the «humanistic and Christian educational tradition» with the best innovations of Activism⁹⁹.

Both the new programmes, however, introduced an important change: for the first time in Italy, primary school was divided into cycles, in order to respect the different evolutionary stages of children and, gradually, to realize the full education of each human person. Primary school had a double purpose: the education of intellect and character of each pupil and the development of the essential conditions for his/her participation in social and national life¹⁰⁰. Consequently, it was important to revalue three principles of Agosti's experience: the primacy of linguistic expressions; the practice of self-government; the promotion of cultural contents arisen from children's environment¹⁰¹.

⁹⁵ G. Chiosso, *I cattolici e la scuola. Dalla riforma Gonella al piano decennale, in Chiesa e progetto educativo nell'Italia del secondo dopoguerra, 1945-1958*, cit., p. 305.

⁹⁶ The 1951 programmes had never become law, because the bill for a school reform presented by Minister Gonella remained suspended in Italian Parliament forever. For this reason, in the spring 1955 the Minister Ermini charged a commission with composing new programmes. He adopted a 'ministerial' strategy to manage and renovate Italian primary school, after the failure of the Gonella Reform. See: [s.n.], *La Commissione per i nuovi programmi*, «Scuola Italiana Moderna», n. 24, 1955, p. 61; Pazzaglia, *Ideologie e scuola tra ricostruzione e sviluppo (1946-1958)*, in *Chiesa e progetto educativo nell'Italia del secondo dopoguerra, 1945-1958*, cit., pp. 513-522.

⁹⁷ Bertagna, *Autonomia. Storia, bilancio e rilancio di un'idea*, cit., p. 141.

⁹⁸ Ministero della Pubblica Istruzione, *Programmi didattici per la scuola primaria*, DPR 14 giugno 1955, n. 503, pubblicato nella G.U. n. 146 del 24 giugno 1955, Roma, Libreria Istituto Poligrafico dello Stato, 1956, p. 5.

⁹⁹ R. Sani, *Le associazioni degli insegnanti cattolici nel secondo dopoguerra, 1944-1958*, Brescia, La Scuola, 1990, p. 133.

¹⁰⁰ M. Agosti, V. Chizzolini, *Programmi didattici per la scuola primaria. Testo e commento*, [1958], VI ediz., Brescia, La Scuola, 1964, pp. 13-24.

¹⁰¹ *Ibid.*, p. 71.

In the early Sixties, the *scuola integrale* continued to represent, with the necessary changes, the cornerstone of the pedagogical and didactic proposal of «Scuola Italiana Moderna». This choice was not affected by the defeat of the hypothesis of a post-primary triennium, after the establishment of a unique Junior High School (Law December 31st, 1962, n. 1859).

Also in the following years, the *scuola integrale* proved to be a valid answer to the new issues supported by the protests of 1968, such as «school of community» and «pedagogy of participation». In fact, it had an innovative (in other word, critical) nature and it recognized a pedagogical function to the community research conducted by all pupils every day.

Thanks to the teacher Alfredo Giunti¹⁰², who in that period joined the editorial staff of «Scuola Italiana Moderna», Agosti's experience was revised and called as *scuola come centro di ricerca* (school as center of research)¹⁰³. It focused on a pedagogical perspective aimed at the full development of human person, a Catholic conception of life and the primacy of popular education (in terms of *educazione di base*): the same innovative features of the *Regents' System*.

¹⁰² See: R. Giunti, Maestro Giunti, in A. Giunti, *La scuola come centro di ricerca*, [1973], II ediz., Brescia, La Scuola, 2012, pp. 295-300; L. Zambotti, *Giunti Alfredo*, in Chiosso, Sani (dir.), *Dizionario Biografico dell'Educazione, 1800-2000*, Vol. I, cit., p. 667.

¹⁰³ See: A. Giunti, *La scuola come centro di ricerca: un'ipotesi didattica*, Brescia, La Scuola, 1973; G. Bertagna, *La didattica della ricerca. Un patrimonio da riscoprire*, in Giunti, *La scuola come centro di ricerca*, [1973], II ediz., cit., pp. 5-19.

French pupils between the two wars of 1870-1871 and 1914-1918

Reading books and their patriotic consciousness

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ABSTRACT: Between the war of 1870, opposing France and Prussia, and the First World War in 1914, textbooks framed the minds of young pupils after the defeat of France in 1870. Some of these books are storybooks, and, by the adventures of their young heroes, boys or girls, the authors tell of the disasters of war, teach patriotism, and the idea of Mother Country. The idea of revenge was not so dominant, as one sometimes thinks; the manuals insist on the importance of native land and the virtues that all children have to develop. The pupils, when they become young adults, are mobilised in 1914, and although they may have learnt to hate war, will fight heartily to defend their homeland, educated by schoolbooks in courage and patriotism.

EET-TEE KEYWORDS: Books for Youth; Reading; Home Country; Nationalism; France; Centuries XIX-XX.

Introduction

After the Franco-Prussian war (1870-71), and before the First World War (1914-1918), France experienced a period of important changes in politics and society. After the heavy defeat of 1871, involving the loss of Alsace and part of Lorraine, society has to be rebuilt, and its values to be defined. The Republic is proclaimed, and, in the scholastic field, very important laws from the minister Jules Ferry, in the 1880's, set up compulsory, free, and secular education.

The expansion of schooling, which began before Ferry's laws, incited publishers to produce new textbooks for these more and more numerous schoolboys and girls.

We shall particularly observe the «reading books», original textbooks, as they present a continual story (as against excerpts), with fictional characters. They can be identified as schoolbooks by the choice of publishers (Belin, Delaplane, Delagrave, for instance, specialize in schoolbooks), by the paratext, often a foreword to teachers, with a teaching apparatus: vocabulary footnotes, questions about understanding, exercises¹.

Destined for pupils of «Cours moyens», 9-11 years old, they were presented in short chapters, often illustrated with documentary pictures and geographical maps.

Using thirteen books of that sort, published between 1873 and 1904, we can question the way war is presented to children, those who, when they become adults, will have to face the German enemy again, since all men born between 1876 and 1899 will be mobilized. How are they told about the 1870 war and its consequences? What part is allocated to any child, boy or girl, in these heroic tales? Finally, how do the authors introduce the notion of territory, of country, main notion in thought about the validity of wars?

1. *How can the «Terrible year» be recounted?*

The 1870-71 War and its consequences, especially the «Commune de Paris» are recalled by Victor Hugo in a poetical book published in 1872, titled «L'Année terrible» (*The terrible Year*). That expression became a set phrase and is often used by authors who treat that painful period in France.

For pupils also, the reading books choose to paint war with different narrative techniques.

Sometimes, the authors² call on a person, who himself experienced the war, to recount the events, making him speak in the first person, in a story or a homodiegetic episode.

Eudoxie Dupuis recalls the war in *La France en zigzag*³. The journey of two brothers across France leads to interesting encounters. Near Orleans, they find a piece of metal on the ground, and «an old white-haired peasant» explains to them what it is:

¹ See F. Marcoin, G. Tison (edd.), *Le Roman scolaire, entre littérature et pédagogie*, Arras, Université d'Artois, 2011 («Cahiers Robinson», n. 29, 2011).

² Many of these authors are presented in C. Amalvi, *Répertoire des auteurs de manuels scolaires et de livres de vulgarisation historique de langue française de 1660 à 1960*, Paris, La Boutique de l'histoire éditions, 2001.

³ E. Dupuis (1835-1906), *La France en zigzag, livre de lecture courante*, illustrated by Boutet de Monvel, Paris, Delagrave, 1881. See the note about this author in *Dictionnaire du livre de jeunesse*, Paris, éditions du Cercle de la Librairie, 2013, s.v. «Dupuis».

C'est un fragment d'obus. Il n'en manque pas dans les environs. C'est qu'on a brûlé bien de la poudre de nos côtés, pendant la guerre de 1870! Ç'a été un triste temps; ceux qui en ont été témoins ne l'oublieront pas. [...] Je peux en parler, car j'en porte encore les marques, reprit le vieillard, relevant la manche de sa blouse et montrant sur son bras une profonde cicatrice. J'ai le pendant à la jambe gauche. Dame! J'ai fait de mon mieux, comme les autres. Quand la patrie est attaquée, il faut la défendre; tout ce qu'on regrette, c'est de n'avoir pas réussi!⁴

This man is a secondary character, who simply crosses the path of the heroes in the book. But sometimes, the witness occupies a much more important place in the tale. The name of these eyewitnesses sometimes becomes the title of the book: *Jean Felber*⁵, or *Monsieur Prévôt*⁶.

Published more than 20 years after the end of the war, the manual by Albert David-Sauvageot is fully titled *Monsieur Prévôt. Récit tiré de la vie réelle* and announces its aims on the cover: «Culture du sens moral. Culture du patriotisme. Culture de l'intelligence». The tale takes place in 1881, when young conscripts celebrate joyfully their approaching departure to the army. Three younger pupils look at them and admire them, and they are proud to discover, on that occasion, that their teacher, M. Prévôt, took part in the war. They ask him to tell what he saw, particularly how he started a fund to buy a machine gun for the Mother Country. He took part in the battle of Champigny, near Paris, and tells it to his pupils with evocative words:

J'ai encore dans l'oreille le grondement du canon, les détonations des obus, le crépitement de la fusillade, le son déchirant des mitrailleuses, les commandements multipliés, les appels des blessés se croisant avec les cris de victoire. Je vois encore les cavaliers prussiens qui chargent en faisant trembler le sol, les fantassins français qui les arrêtent à la pointe de la baïonnette, les officiers d'infanterie s'engageant au plus épais de la mêlée [...]⁷.

Wounded in the shoulder, M. Prévôt sees the Germans escape before being evacuated; the tale is shortened, since it finishes on that positive point, when that battle was in fact a defeat for the French Army. Nevertheless, enthusiasm overcomes M. Prévôt's pupils, who exclaim: «When we are soldiers, we will also defend the flag until death!»⁸.

In other cases, the narration presents a character whose actions are told in the 3rd person, in a heterodiegetic novel.

Antoine Chalamet's novel, *Jean Felber*, is subtitled: *Le Sentiment de Famille – L'Amour de la Patrie – le Soldat*. It is wholly dedicated to the story of an Alsatian family whom the 1870 war is to separate, the old parents staying in the village while their son, Jean, fights in the French Army. From the first pages, the

⁴ Dupuis, *La France en zigzag*, cit., p. 27.

⁵ A. Chalamet, *Jean Felber*, Paris, Picard & Kaan, 1891.

⁶ A. David-Sauvageot, *Monsieur Prévôt*, Paris, A. Colin, 1894.

⁷ *Ibid.*, p. 27.

⁸ *Ibid.*, p. 30.

tone is given: «Alsace and Lorraine, after the disastrous 1870 war, have been snatched from France», the author writes in a short foreword. A «preliminary reading» follows, which announces the subject of the entire book:

C'est un douloureux récit, mais que tout Français doit connaître et méditer, que celui de la guerre de 1870.

Sachez donc qu'en cette année, qu'on a justement nommée l'année terrible, nos soldats furent vaincus en plusieurs batailles, non qu'ils aient manqué de courage, mais parce qu'ils n'étaient ni assez nombreux, ni assez bien préparés pour lutter contre les formidables armées de l'Allemagne⁹.

With emotion, the author recalls that the winner «as he retired, took a piece of our flesh»¹⁰. Then the author steps aside to give place to a fiction centred on Jean Felber. This young man, who has just completed his two years of military service, takes part in the battle of Froeschviller, in Alsace, on August the 6th, 1870. That battle is told in detail, in ten pages and six chapters: «Froeschviller battle / Attack / The defeat / The cuirassiers' charge / Captain Robert's wound / After the battle». The story is not only factual, the style is exclamatory and full of emotion:

Moment terrible! Ces hommes qui tout à l'heure se battaient comme des lions sont ramenés en arrière; ils battent en retraite, l'espoir de vaincre ne les soutient plus; la journée est finie, la bataille est perdue!¹¹

Jean Felber was heroic during that action. But he is discouraged at the thought of «the lost battle and the invasion of the Mother Country»¹². After that episode, in a chapter of commentary, the author shows how ambivalent war is:

La guerre est chose abominable: elle prend des hommes paisibles la veille, elle leur met le fusil en main et elle en fait des meurtriers; elle réveille au fond de l'âme humaine tous les mauvais instincts de brutalité; elle ramène à la barbarie des âges passés les peuples les plus fiers de leur civilisation. Et pourtant cet horrible fléau de la guerre suscite d'admirables vertus¹³.

And Chalamet evokes the dedication of the soldier heroically defending his position, the activities of doctors, stretcher-bearers and nurses, on the battlefield.

Jean continues the war with the Loire Army. Diversifying points of view, the author interpolates correspondence, particularly a letter to Jean from his sister Catherine, who lives in Paris. She tells her brother of the Parisians' very difficult

⁹ Chalamet, *Jean Felber*, cit., p. 6.

¹⁰ *Ibid.*

¹¹ *Ibid.*, p. 54.

¹² *Ibid.*, p. 58.

¹³ *Ibid.*, p. 59.

life during the siege, the lack of food, the queues in the butchers' shops¹⁴, but also their courage and resolution.

The siege of Paris had already been told, in 1877, in a book by Eudoxie Dupuis, *Daniel Hureau*¹⁵. Aged 19 years, the eponymous hero, an orphan, manages with difficulty, thanks to his employment, to survive and take care of his young sister. He enrolls in the National Guard, and many chapters tell the difficulties of the siege. Further on, the author alludes to the «Commune de Paris», a painful period our authors speak little about, for it is a cause of National division: «The Commune reigned in Paris, left to the horrors of the civil war, under the eyes of triumphing enemies»¹⁶. In spite of the amnesty proclaimed in 1880, reading books usually avoid this subject.

In the same year, 1877, Belin published a book which had a lasting success, *Le Tour de la France par deux enfants*, which sold more than 8 millions of copies from 1877 to 1976. The book, signed «G. Bruno», is the archetype of «reading books»; even if it is not exactly the first, it had many imitators. G. Bruno is the pen name of a primary school teacher, Augustine Fouillée¹⁷; this storybook tells the long trip of two brothers, two young orphans who decide, in 1870, to leave Lorraine occupied by the Germans to meet up with an uncle and remain French. They will succeed, owing to courage and resolution, establishing themselves eventually in a farm in the Beauce. The epilogue takes place in 1876, and shows the reconstruction, especially with two pictures: «The farm devastated by the war» and «the farm repaired by the peace»¹⁸. The two brothers, who are 14 and 7 years old, only see the painful consequences of war.

But, ten years later, in *Les Enfants de Marcel*¹⁹, G. Bruno gives a more direct account of the war. Sergeant Marcel takes part in the battles of the «Armée de l'Est»; in January 1871, his wife, a canteen-keeper, is killed, leaving four orphans. Marcel's young son, Louis, aged thirteen, a child soldier, accompanies his father during the retreat of the French Army. During a violent battle, Marcel is wounded and loses his right arm. Louis' devotion helps him to reach Switzerland, then to get back home to the Bordeaux area where Marcel's children, growing up, learn to become good citizens, according to the plan one can see in the title of the book: «moral and civic instruction in action».

In 1892, in *Sylvain, histoire d'un petit paysan*²⁰, the eponymous hero, when completing his military service, learns by chance that his elder brother, during the war of 1870, was a hero and saved his major's life. The latter tells

¹⁴ *Ibid.*, p. 123. A picture in that chapter shows a shop which advertises: «Rats. Dog and cat meat».

¹⁵ E. Dupuis, *Daniel Hureau*, Paris, Delagrave, 1877.

¹⁶ Dupuis, *Daniel Hureau*, cit., p. 267.

¹⁷ (1833-1923). She was the wife of Alfred Fouillée's, a famous philosopher.

¹⁸ G. Bruno, *Le Tour de la France par deux enfants*, Paris, Belin, 1877, pp. 293 et 298.

¹⁹ G. Bruno, *Les Enfants de Marcel*, Paris, Belin, 1887.

²⁰ J.B. Tartièrre, *Sylvain, histoire d'un petit paysan*, Paris, Larousse, 1892.

the battle of Châteaudun, his wound, and the courage with which Laurent, Sylvain's brother, saved him. Once again, a direct witness expresses himself in an interpolated narration.

Another narrative method is used to speak about war: the insertion of texts in the main story, as quotations or interpolated anecdotes. Claire Nectoux, in *Journal d'une petite écolière* uses this method²¹. Her book advocates an original pedagogical method, which consists in the pupils keeping a diary to fix the discoveries of each day and to train the pupils to write. This reading book is presented as the diary of Camille Leblanc, 12 years old. Reporting a «lovely little story» related by her teacher, she tells, with the title «Death for the Mother Country», how a tricolour flag appears at the top of an old fir-tree, in an Alsatian village occupied by the Prussians. Nobody manages to take down this flag, and the authorities decide to cut it down. At the base of the fir-tree, an anonymous hand writes, the day after: «Death for Mother Country!»²². That anecdote is told without any commentary, but the tone of the story is so orientated that the reader, even a 12 year-old, understands that the French have the best part in it.

Further on in the same book, Camille Leblanc, as she studies the story of the French Revolution of 1789, speaks of acts of violence during the «Terreur» and quotes a hymn which Dupré, a French poet, may have created to accompany his own death, the last words of it being: «Mourir pour la patrie, / C'est le sort le plus beau, le plus digne d'envie!». These verses will become the refrain of a patriotic song often used during the First World War²³.

Warlike stories therefore take place in many of these books which, let us recall, are aimed at pupils too young to remember the «terrible year». The phrase «our disasters», to evoke briefly the sad assessment of the war, is often found in different books²⁴.

Authors try to move them and also to enforce the determination of future conscripts. Thus the author of Sylvain proceeds from «story» to «speech»²⁵ to evoke the year 1870, when *Sylvain* was 1:

Cette année-là fut une année terrible pour la France. On était en 1870. Au mois de juillet, la guerre avec l'Allemagne éclata comme un coup de foudre. La bravoure de nos soldats ne put compenser la mauvaise organisation de l'armée française. Aussi la guerre fut-elle pour nous

²¹ C. Nectoux, *Journal d'une petite écolière. Livre de lecture et de composition pour la préparation au certificat d'études primaires d'après les cahiers d'une élève*, Paris, Delagrave, 1892.

²² *Ibid.*, pp. 83-85.

²³ *Ibid.*, p. 282. «To die for Homeland/ is the most beautiful fate / the most worthy of envy!» See 14-18 en chansons, <http://lycees.ac-rouen.fr/ango/IMG/pdf/14-18_en_chansons.pdf> (accessed: September 30, 2014).

²⁴ For instance Bruno, *Le Tour de la France par deux enfants*, cit., p. 116; Bruno, *Les Enfants de Marcel*, cit., p. 198; C. Juranville, P. Berger, *Troisième Livre de lecture à l'usage des jeunes filles*, Paris, Larousse, 1891, p. 160.

²⁵ As defined by Gérard Genette, *Figures III*, Paris, Seuil, 1972.

une série de défaites. Elle nous coûta l'Alsace, une partie de la Lorraine et une indemnité de cinq milliards. Elle nous coûta surtout, et avant tout, la mort d'une foule de soldats qui arrosèrent de leur sang les champs de bataille. N'oublions pas! Petits Français, grandissez en y pensant souvent!²⁶

The tone is here rather critical of the army. One can discern as an echo of words attributed to Gambetta about Revenge, which may be apocryphal: «Always think about it, never speak about it». But that idea of revenge is rarely explicitly expressed, and the word itself is nearly missing in our corpus. A discrete hint can be found in *Troisième Livre de lecture des jeunes filles*²⁷: one of the two heroines, Madeleine, writes to her sister that she met an inhabitant of Metz who lived in that town during the war: «He gave us some details very painful to hear for French ears. I spare you them. A day will come, we hope, which will obliterate our defeats»²⁸.

The novel *Jean Felber*, probably the most warlike in all our corpus, is structured by this idea, from the exclamation: «Let's not forget!» in the foreword, to the next-to-last chapter: «He [*Jean Felber's brother-in-law*] is one of those who never forgot the 1870 disasters and who always think of them, not wailing and despairing, but seeking the way to prepare a better future». And the final word, in that book, is attributed to a nine-year-old child: «Be quiet, grand-pa, we, little pupils of to-day, soldiers of to-morrow, shall take back Alsace from the Prussians!»²⁹.

Setting aside these exceptions, the idea of revenge has not the importance sometimes assigned to it, and an historian, Bertrand Joly, goes so far as to say that «France never wanted Revenge, even in the first months immediately after defeat»³⁰.

So children who read these books are called to keep, not the memory of a period that only the oldest of them saw, but the feeling of a disaster the consequences of which last till their times.

2. *The child, participant in the wars?*

The teachers who wrote these reading books are also eager to involve children more directly, by presenting young heroes with exemplary behaviour. We have

²⁶ Tartière, *Sylvain*, cit., p. 109.

²⁷ Juranville, Berger, *Troisième Livre de lecture à l'usage des jeunes filles*, cit.

²⁸ *Ibid.*, p. 162.

²⁹ Chalamet, *Jean Felber*, cit., pp. 7, 366, 370.

³⁰ B. Joly, *La France et la revanche. 1871-1914*, «Revue d'histoire moderne et contemporaine», n. 46-2, 1999, pp. 325-347, <<http://gallica.bnf.fr/ark:/12148/bpt6k61320494/f87.image.r=Revue%20d%27histoire%20moderne%20et%20contemporaine.langFR>> (accessed: October 1, 2014).

already met Louis, Marcel's son, accompanying his father to the front line; he is a fictional character. But some stories also recount the authentic heroism of children or young people. In *Les Enfants de Marcel*, G. Bruno reports the courage of Juliette Dodu, who in 1870 was in charge of a telegraphic office and conveyed confidential information to the French army, without the German's knowledge. She escaped death and received the Montyon Prize, a prize for virtue awarded by the Académie française³¹.

A book explicitly intended for girls, *Suzette*, shows the idea of heroism, «one of the most beautiful virtues of mankind», with two examples: Jeanne Hachette, whose action brought a victory in Beauvais in 1472, and also, more extensively, Suzanne Didier, who was shot because she refused to tell the Prussians the direction the French Army had taken. But the book also recalls that there is another heroism, which is simply doing one's daily work³².

Clarisse Juranville's book shows another heroic girl: Marie-Edmée Pau, a clever artist, who went over the battlefields in 1870, taking care of the wounded and comforting them, sketching dying men's portraits for their families, opening a workshop to make warm clothes for the soldiers, and who died of her efforts in 1871³³. The idea common to these three examples is to show children that, in spite of their young age, extraordinary achievements are possible.

Boys are particularly invited, more or less directly, to prepare for military service. A decree, on July 6th 1882, established the possibility, for pupils aged more than 12, to have a military instruction, with uniforms and wooden guns³⁴. Previously, E. Houët's book, *Pierre Dumont*, published in 1873, gives an important part to warlike games, led by the young Henri Demérens. With other pupils in his school, he organizes an imitation of war – French against French, because nobody wants to be a Prussian – and replays the attack of «Fort d'Ivry», with uniforms and missiles; Gabrielle, Henri's young sister, explains to their father:

Le jeudi les petits de l'école forment un régiment, les soldats d'Henri se partagent les grades et c'est alors qu'on fait l'exercice, et des marches et des contremarches! Henri est très sévère: l'autre jour il a mis à la salle de police le fils Julien qui avait perdu son fusil³⁵.

Without taking the official form of school battalions, several books (especially those which address young boys) insist on the importance of gymnastics as a

³¹ Bruno, *Les Enfants de Marcel*, cit., p. 187. A street is named «Juliette Dodu» in Paris, and also in Saint-Denis de la Réunion, her birthplace. But the anecdote was contested afterwards: <http://fr.wikipedia.org/wiki/Juliette_Dodu> (accessed: September 30, 2014)

³² Marie-Robert Halt, *Suzette, livre de lecture courante à l'usage des jeunes filles*, Paris, Delaplane, 1888, p. 17.

³³ Juranville, Berger, *Troisième livre de lecture*, cit., p. 160.

³⁴ The school battalions did not last beyond 1890.

³⁵ E. Houët, *Pierre Dumont, livre de lecture courante à l'usage des classes et des familles*, Paris, Delagrave, 1873, p. 15.

preparation for military life³⁶. But it is necessary for these warlike games to be supervised and give a sense of responsibility. G. Bruno entitles a chapter of *Les Enfants de Marcel*, «Disobedience». Marcel's youngest son, Robert, «liked to play soldiers with his young comrades. One of them, who was richer, had a little childish gun, harmless. Robert despaired of only having a stick as a gun». Tempted by his father's ancient gun, hanging on the wall, he takes it secretly... and almost kills his young sister. After the first shock, his father draws the lesson of the accident: «It is not the gun which makes the soldier, it is discipline and respect of the rules»³⁷.

So nobody will be surprised that conscription and a military career have great importance in the plans the young heroes build about their future. Henri Demérans, Louis Marcel will get into the famous school of Saint-Cyr. Others, more simply, accomplish their military service with conviction. It was a compulsory period which could, for some young men, last five years (three years, after 1889). One can understand that some, especially in the country, were reluctant to be away from home for such a long time. Therefore reading books justify military service. Jacques, Suzette's eldest brother, subject to conscription and drawing lots, which submitted to luck the duty of young men, draws a «bad number» and has to go away for five years. An old neighbour advises him to hide and become a refractory; he also recalls that, in another period, the richest men could pay for a substitute who went instead of them. Another neighbour suggests to Suzette's father to go and see their Member of Parliament to get an exemption. Suzette goes with her father on that visit, and the author cleverly opposes the arguments. First, Suzette speaks vehemently:

Mon père et moi sommes venus vous demander, avant tout, s'il est bon que des travailleurs quittent pour un temps si long la terre qu'ils cultivent, et si c'est le profit d'un pays de remplacer en leurs mains la charrue qui fertilise et nourrit, par le fusil qui tue. Oui, nous nous demandons pourquoi il faut des soldats; pourquoi, à l'heure où nous sommes, les peuples se battent encore, s'égorgent, comme le font entre eux les lions et les tigres, et se ruinent, au lieu de s'entraider!³⁸

The Member of Parliament answers with a clever speech, beginning by agreeing with Suzette, but reminding them that such an ideal of fraternity is still remote and that, to save France from division, «therefore from death», all have to unite to protect it. Hearing that, «father and daughter get up, as if electrified» and come back to the village to persuade Jacques and the neighbours of the necessity of that patriotic duty³⁹.

Jean-Baptiste Tartière, in *Sylvain, histoire d'un petit paysan*, also touches on the subject, with less subtlety than Marie-Robert Halt. The chapter devoted to

³⁶ Chalamet, *Jean Felber*, cit., pp. 367.

³⁷ Bruno, *Les Enfants de Marcel*, cit., pp. 149-150.

³⁸ Halt, *Suzette*, cit., p. 254.

³⁹ *Ibid.*, pp. 255-257.

scription is preceded by an epigraph from a widely read textbook, *Le Petit Français*, by Charles Bigot⁴⁰. When he is 20, Sylvain is called for duty, «to pay the bloody tax that every able-bodied citizen owes to his country». While his mother with sadness, sees him go, Sylvain is «really happy at the thought of being a soldier»⁴¹.

Monsieur Prévôt, David-Sauvageot's book, was published in 1894, but the story takes place in 1881, and begins with a scene of drawing lots, showing merry conscripts: «We shall go fearlessly and we are decided to be brave, in the barracks and on the battlefield.» Their mothers don't share their enthusiasm, and the teacher, monsieur Prévôt, tries to reassure them, speaking of the important part their sons will have to play in defending the Mother Country. And he quotes the famous «Chant du Départ», in a verse in which the mothers are speaking: «We gave you life / Warriors, it is no more yours / All your days belong to the Mother Country / She is your mother before us»⁴².

In that time of generalised school attendance, the authors of reading books want to emphasize the importance of girls and women in the patriotic movement that must not be a male prerogative. While the oldest book in our corpus, Pierre Dumont, firmly puts girls in their place⁴³, most reading books insist, we saw, on the courage of some heroic girls, either those which explicitly aim at girls, such as *Suzette* and *Troisième livre de lecture des jeunes filles*, or those which aim at all, boys and girls, such as *Les Enfants de Marcel*. In nearly every manual, a great figure is established as a model, the figure of Joan of Arc.

Five books out of thirteen in our corpus evoke the young Lorraine girl who fought to deliver France during the Hundred Years War (1337-1453). She is seen not so much as a catholic saint (she will be canonized in 1920), but as a figure of resistance and obstinacy, given as an example to young French people.

Bruno, in *Le Tour de la France par deux enfants*, devotes a large part to Joan of Arc, presented in the secular version of the book as «a humble peasant from Lorraine», and «a noble girl of the people of France»⁴⁴.

In *Suzette*, during the argument with the Member of Parliament, that we saw above, there is the reference to Joan, as a reason to convince women that they also have a part to play in the growth of patriotism:

⁴⁰ Charles Bigot, *Le Petit Français*, Paris, Weill & Maurice, 1883. A book all devoted to Homeland and to the necessity for any child of thinking always about the terrible defeat.

⁴¹ Tartière, *Sylvain*, cit., pp. 148, 152.

⁴² David-Sauvageot, *Monsieur Prévôt*, cit., pp. 4-9. Le «Chant du départ» is a song by Étienne Méhul and Marie-Joseph Chénier (1794).

⁴³ E. Houet, *Pierre Dumont. livre de lecture courante a l'usage des classes et des familles*, Paris, C. Delagrave, 1873, p. 32. «I urge you to take an umbrella when the weather is uncertain, unless you want to become an Amazon and follow your brother at war. [...] He is a brave and headstrong boy. But he cannot be taken as an example by a little girl who is not destined to become a French field-marshal».

⁴⁴ *Le Tour de la France par deux enfants* had two successive versions, before and after the law organizing the separation between Churches and State in 1905. See pp. 59-61.

Jadis, à l'heure où la France semblait sous l'invasion, où les hommes perdaient courage, le patriotisme éclata brusquement, magnifiquement, dans une âme de femme, la grande Jeanne d'Arc, et sauva tout!... Aujourd'hui encore, le patriotisme compte sur l'âme des femmes. Elles ne peuvent pas vouloir que le sacrifice qu'une telle patrie commande, un seul le repousse⁴⁵.

The *Troisième livre des jeunes filles* details the ceremony in honour of Joan which takes place in Orleans every year on May the 8th. Her eulogy is delivered in the cathedral. «The orator finishes with these words: “a country saved and redeemed by you, Joan, is an immortal Country”»⁴⁶.

3. *Small countries and Mother Country*

The Country, so often spoken of in the reading books, represents what in the eyes of pupils, in a France, which was then essentially rural? Jean-François Chanet studied the apparent discrepancy between the «great» Country and the «small» countries, where children have their roots, as well as most of their teachers⁴⁷.

To consolidate the unity of the Mother Country, many educators think it necessary to fight the use of patois and provincial dialects. It was one of the important pedagogical debates in that period. So Bruno, in *Le Tour de la France par deux enfants*, tells of the utter confusion of both brothers, who stop at an inn in Dauphiné, where all the adults speak in a patois that André and Julien cannot understand, so they feel very isolated, until the innkeeper's children come back from school. Julien asks his brother:

– Pourquoi donc tous les gens de ce pays-ci ne parlent-ils pas français?
– C'est que tous n'ont pas pu aller à l'école. Mais dans un petit nombre d'années il n'en sera plus ainsi, et par toute la France on saura parler la langue de la patrie⁴⁸.

One pedagogical aim of these books is to fight against rural depopulation, when many young peasants leave the village of their birth to go to a big town. J.-B. Tartière's manual, *Sylvain*, is mainly organized around that opposition, and the town, especially Paris, is shown as a place of troubles, when Sylvain, the hero, finds happiness in the village of his childhood, where he finally becomes a town-councillor, and maybe, later, the mayor, as the conclusion suggests. Only

⁴⁵ Halt, *Suzette*, cit., p. 256. That page is accompanied by a picture representing «Joan of Arc in Orleans».

⁴⁶ Juranville, Berger, *Troisième livre de lecture*, cit., p. 328.

⁴⁷ J.-Fr. Chanet, *L'École républicaine et les petites patries*, Paris, Editions Aubier, 1996 («Aubier Histoires»).

⁴⁸ Bruno, *Le Tour de la France par deux enfants*, cit., p. 161.

military service, in Bordeaux, gets Sylvain out of the narrow bounds of his «small homeland»; in a lot of books, if a journey to Paris takes place in the nearly obligatory episodes, it often finishes with the statement that nothing is better than the native village.

Nevertheless it is necessary to mould the children's patriotic spirit and make them feel part of the great Country. For this purpose, many books use the 'tour': a journey during which the children have to travel the length and breadth of France, for family reasons or simply for amusement⁴⁹.

Le Tour de la France par deux enfants is the best example to make the pupils aware that they belong to the Mother Country. The two young brothers, leaving Lorraine to search for their uncle, travel through the French provinces, always interested in local productions, either agricultural or industrial, and in «great men» in every place, given as examples to be followed. That book was often imitated, especially, in our corpus, by *La France en zigzag*, by Eudoxie Dupuis, published four years later, and by the *Troisième livre de lecture* in which, and this is uncommon, there are two girls, two sisters led by the risks of life to travel through France.

These books are illustrated by pictures depicting landscapes or local plants, and also by many maps, particularly in G. Bruno's book, which shows, for each stage of the journey, the region covered. This comes from the deliberate idea of teaching pupils the geography of their country. «I will finish knowing by heart my geography of France!» exclaims little 7-year-old Julien⁵⁰. He also seizes the opportunity of his wanderings to revise, about each department, the name of its prefecture and sub-prefectures. The young travellers in *La France en zigzag* have a road-map and often look at it: «I like to see where the lands mentioned are situated», explains one of them⁵¹.

The insistence on the necessity of knowing one's country is justified by a widespread idea of that time: if the Prussians won the war, explains Jean Felber's brother, it is because «they had good maps and knew how to use them. Let us hope that in the future French soldiers won't be worse on that point, nor on the others.»⁵² Geography is then an expanding science, on the other side of the Rhine, of course, but also in France, particularly under the influence of Paul Vidal de la Blache, true founder of that subject.

Another superiority explains, according to G. Bruno, the power of Germany: its important birth rate. A character, in *Les Enfants de Marcel*, recalls: «the cult of the family has contributed to the strength of Germany, and without it, France will not rise again»⁵³.

⁴⁹ See P. Cabanel, *Le Tour de la Nation par des enfants. Romans scolaires et espaces nationaux (XIX^e-XX^e siècles)*, Paris, Belin, 2007 (also in «Histoire de l'éducation», n. 121, 2009).

⁵⁰ Bruno, *Le Tour de la France par deux enfants*, cit., p. 94.

⁵¹ Dupuis, *La France en zigzag*, cit., p. 138.

⁵² Chalamet, *Jean Felber*, cit., p. 289.

⁵³ Bruno, *Les Enfants de Marcel*, cit., p. 261.

The idea of the Mother Country is often associated with an idea of supremacy. «I love France with my whole heart! I would like it to be the first nation in the world»⁵⁴, Julien says. If the idea of the diversity of territories inside the homeland is often pushed to the fore (with the metaphor of a beautiful garden adorned by various flowers, for instance, in *Le Tour de la France par deux enfants*)⁵⁵, competition, rather than union between the nations, is evoked. «Oh, Julien says, so it is the same for people as it is for pupils at school, when everybody tries to come first?»⁵⁶.

Competition, with England in the quoted passage, is only industrial and commercial. But, towards Germany, the opposition is ideological and moral. Above all, the story of *Jean Felber* shows a rather negative picture of the Germans. Their soldiers, in the village they occupy, indulge in a banquet with stolen food, where they appear as dirty and gluttonous. However, the author concedes, «Germany may be proud of its civilisation», with, particularly, primary schools for all pupils, and remarkable universities. But the Germans set fire to the famous library of Strasbourg and aimed their guns at the cathedral, «the most beautiful monument in Alsace».

L'Allemagne, comme toutes les autres nations d'Europe, avait signé cette convention [*La convention de Genève, 1864*]. Mais l'Allemagne a renié sa signature et manqué à ses engagements. Elle ne respectait pas la science quand elle a brûlé la bibliothèque, ni l'art et la religion quand elle a bombardé la cathédrale; en incendiant l'hôpital elle n'a pas respecté la souffrance de l'humanité⁵⁷.

But few authors are so violent and most manuals rather insist on the idea of the necessary development of the Country. Commercial and industrial development, of course, but also cultural radiance. The ideal offered to the young readers of *Le Tour de la France par deux enfants* is to make the Country, owing to «Parisian scientists», «an assembly of educated and generous men, having a place among the first nations in the world»⁵⁸. The book often uses personification, André and Julien speaking to France with numerous apostrophes, as «Beloved France, we are your sons and we want to stay worthy of you, all our life!»⁵⁹.

The different «tours of France» told in these books make the children travel all over metropolitan France; but many of them also show the radiance of France beyond its exact borders, by colonial expansion, very important in that period.

⁵⁴ Bruno, *Le Tour de la France par deux enfants*, cit., p. 45.

⁵⁵ *Ibid.*, p. 242.

⁵⁶ *Ibid.*, p. 241.

⁵⁷ Chalamet, *Jean Felber*, cit., pp. 62-70.

⁵⁸ Bruno, *Le Tour de la France par deux enfants*, cit., p. 276.

⁵⁹ *Ibid.*, p. 25.

Algeria, colonized since 1830, is used as a retreat by the Alsatians who do not want to stay in the annexed territory, as one can see especially in *Les Enfants de Marcel*. Two books published in the same year, 1894, emphasize the radiance of the Country on other continents. The teacher, M. Prévôt, in the book by David-Sauvageot, makes the pupils sum up all the conquests of France from 1881 to 1894, and concludes:

Les étrangers, qui rencontrent nos explorateurs et nos soldats en Afrique et partout ailleurs, ne peuvent pas se dissimuler que nous nous sommes singulièrement relevés de nos désastres. Tous les peuples nous estiment, à l'heure actuelle, et plus d'un désire notre amitié⁶⁰.

At the same time, Gabriel Compayré, a professor and famous Member of Parliament, publishes a reading book, *Yvan Gall, le pupille de la marine*, outwardly rather different from those we have met so far. But the author justifies that, in a foreword «To the pupils of our schools»:

Au premier abord, vous croirez peut-être que ce récit, dont la plus grande partie vous transportera hors du territoire français, vous éloigne et vous sépare de la France. Détrompez-vous: c'est la France que vous retrouverez à chaque page; c'est le rayonnement de sa force à l'extérieur, c'est l'expansion de son génie qu'on a voulu vous montrer⁶¹.

The eponymous hero is a young Breton, who has embarked on a military ship, seeking his father, a sailor who never came back from an expedition to Newfoundland. On that boat, he sails all around the world, learning a lot in every port of call; his diary and his letters to his family draw the picture of France, radiant on every continent, always insisting on the greatness of the Mother Country and on the necessity to defend its flag everywhere. The story is accompanied, as it is right and proper, with a planisphere showing the route, either on sea or land, followed by Yvan.

4. «We, little pupils of to-day, soldiers of to-morrow»⁶²

So trained, the young pupils in the decades 1880 and 1890, those who will be mobilized when the First World War starts in 1914, could imagine the Mother Country as a true mother for them. In what state of mind will they face this new war, thirty-four years after the one they were so often told about?

The first book in our corpus, *Pierre Dumont*, published in 1873, is oddly the one where one can see a vehement condemnation of war. In spite of the warlike games we saw young Henri playing, a debate between him and his father leads

⁶⁰ David-Sauvageot, *Monsieur Prévôt*, cit., p. 337.

⁶¹ Gabriel Compayré (1843-1913), *Yvan Gall, le pupille de la marine*, Paris, Delaplane, 1894, p. 4.

⁶² Chalamet, *Jean Felber*, cit., p. 370.

to this conclusion: «when war is just, it becomes a duty, but a terrible duty»⁶³. And, farther on in the same book, a wise man uses very strong words:

La guerre est une chose insensée et cruelle, on ne peut l'expliquer qu'à la manière des grands fléaux que Dieu envoie pour châtier les peuples: les tremblements de terre, la peste, les épidémies. La guerre s'allume dans le cœur des hommes contrairement à leur caractère, à leurs affections, à leurs intérêts; c'est une épidémie. La raison n'y peut rien⁶⁴.

Even the most warlike of all the books we have studied, *Jean Felber*, nevertheless uses such words to condemn war:

La guerre c'est le ravage des champs, c'est le bombardement et l'incendie des villes, c'est la mort pour des milliers de jeunes gens valides, espoir de la Patrie; la guerre renverse les lois de la nature et force le père aux cheveux gris à suivre le cercueil des fils qui auraient dû lui survivre⁶⁵.

The authors of these reading books had experienced the disaster of 1870, and they try to reconcile their recoil facing war and the necessity of defending the Country, and even, as we saw, to think about taking the lost provinces again. That contradiction is solved with the idea of «just war», as can be seen in a famous poem by Charles Péguy, a writer who was a pure product of Republican schools, and will die as early as September 1914. The previous year, he wrote in *Ève*:

Heureux ceux qui sont morts pour la terre charnelle,
Mais pourvu que ce fût dans une juste guerre.
Heureux ceux qui sont morts pour quatre coins de terre.
Heureux ceux qui sont morts d'une mort solennelle⁶⁶.

The teacher, who is a veteran, Monsieur Prévôt, in the book bearing his name, speaks to the children of the «terrible game of war», and rather advocates what would be called to-day the force of dissuasion. «I know that *nobody dares to have a quarrel with us*. Let us be sure that people think twice before attacking a nation [...] that is conscious of its force and right, and has always shown its courage over all the battlefields in the world!»⁶⁷.

Lastly, there is a reading book quite different from the others, more recent than those we studied: it was written by two primary school inspectors, Edouard Petit and Georges Lamy; its title is *Jean Lavenir*, so the hero's name is quite a program (*Lavenir* = the future). The hero, the narrator, is an orphan who lives

⁶³ Houet, *Pierre Dumont*, cit., p. 169.

⁶⁴ *Ibid.*, p. 187.

⁶⁵ Chalamet, *Jean Felber*, cit., p. 43.

⁶⁶ Charles Péguy (1873-1914), *Ève*, 1913, in *Œuvres poétiques complètes*, Paris, Gallimard, «Bibliothèque de la Pléiade», 1957, p. 1026.

⁶⁷ David-Sauvageot, *Monsieur Prévôt*, cit., p. 38. Underlined by the author.

in the country; a good pupil, he learns at school all the duties of social life and, when the time comes for military service, he starts sadly, because he has to quit the studies in agriculture which he attends eagerly. But, in the barracks, scrupulously doing his duty, he thinks about modern war: «We only have to defend ourselves and not to attack other people. The republican army is not an instrument of conquest like a monarchic army». And he recalls, in a letter to his adoptive family, that peace «is the condition of every progress and can alone prepare better men and better times»⁶⁸. These chapters are followed by a subject to develop:

La guerre. Que pensez-vous de la guerre? Cherchez-en la cause principale et montrez comment pourraient être résolus pacifiquement les différends entre les nations. En attendant cet avenir meilleur, dites ce que la prudence commande aux nations soucieuses de garder leur indépendance.

After that precise wording, a detailed framework to which, maybe, the pupil will not have much to add, suggests the idea of «universal peace» which is increasing.

Then a long development connects patriotism and solidarity. So, it is not far from Jaurès's ideas which, unfortunately, will not win in 1914.

Thus shaped by the republican school, young adults in 1914 will do their duty, while hoping for a reconciled world. They were strongly trained by these very common reading books in the idea of fighting for a good cause. So, the desire of peace between the nations did not prevent them from defending their Country.

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Obstacles to teaching the Portuguese language in elementary schools in the city of São Paulo (Brazil) in the early 20th century

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ABSTRACT: This article focuses on some of the obstacles to teaching the Portuguese language in public and private Italian Elementary Schools in the city of São Paulo (Brazil) in the early 20th century. The curriculums of such schools always included the Portuguese language, prioritizing reading and writing. The large number of foreign students and children of foreign background compromised the teaching of the national language. The school population of Italian origin was large, and the curriculum should be adapted to the reality of such situation. There was emphasis on the linguistic cohesion of the population, with the purpose of forming a national identity. The mandatory teaching of Portuguese was introduced in schools subsidized by the Italian government, which had 6,000 students enrolled in 1907. Documents from the *Arquivo Público do Estado de São Paulo* [Public Archive of the State of Sao Paulo] were used as research sources. We concluded that such *Italianization* jeopardized the teaching and learning of the Portuguese language in Elementary Schools in the city of São Paulo.

EET-TEE KEYWORDS: Primary Schools; Language Learning; Portuguese Language; Nationalization; Cultural Identity; Brazil; XX Century.

Introduction

There were great difficulties related to teaching Portuguese in the early years of the 20th century. The city of São Paulo was full of foreign inhabitants, who outnumbered the local population. The immigrants settled in specific

neighbourhoods, where they could go back to their former everyday habits and be closer to people who had the same origin. Thus, they established neighbourhoods that represented their respective hometowns. Schools were created based on this geographical distribution in the city. As a result, there were two types of Elementary Schools: public schools, which accepted students of all sorts of origin, and private schools, which received grants from the Italian government and prioritized students of Italian origin.

In this regard, a conflict between public Elementary Schools and the Italian private ones was created. Public schools taught their students to read and write in Portuguese, while the Italian subsidized schools taught them to read and write in Italian. There was a law that required all Elementary Schools to teach Portuguese to their students, but this law was not readily observed. The curriculum of public Elementary Schools always included the teaching of Portuguese, more specifically reading, writing, and grammar. In some situations, the teaching of Brazilian History and Geography was also considered, so that the teachers of these subjects could instruct about local characteristics in schools with a large number of foreign students.

The information described in this article was collected from primary documentary sources. This contributed to shedding a new light on History and added value to the narrative developed. It confirms the importance of re-reading and revising known documents that can be understood based on other aspects.

The determination of sources requests a founding gesture represented by the contribution of a place, tool or technique. The first indication of such displacement: there is no work in which known resources are not used in a different manner. In this article, the documentary sources were already used for different purposes during their existence, but with different objectives. Thus, it is not just a matter of giving voice to this large number of dormant documents. It means transforming something that had a previous position and role, into something else, with a different function¹. In the same way [...] a project is considered to be scientific when it involves a redistribution of space and primarily consists of providing a position by the establishment of sources – that is to say, by an inaugurating action and by innovative techniques.

The *Annuarios de Ensino do Estado de São Paulo* [Annual Teaching Reports of the State of Sao Paulo] and other journals written in Italian that circulated in the city of São Paulo at that time were used as source of information. During the examination of this official documentation, it was necessary to go beyond appearances, so as to investigate the society as a whole during that period. The primary documentary sources can be found in public archives, libraries and departments that still keep archived documents. The archives are responsible for the safekeeping and maintenance of the most various documents because:

¹ M. de Certeau, *L'écriture de l'histoire*, Paris, Gallimard, 1975; trad. pt. *A escrita da História*, Rio de Janeiro, Forense Universitária, 2002, p. 82.

[...] they make up a technical world, a world where complexity can be found again. It is, however, a triaged and miniaturized complexity and, therefore, one that is possible to shape. It is an accurate space in every sense of the word; [...] the professional and written equivalent of what they represent in the common experience of all peoples, that is, the practices used by every society to explain, miniaturize, formalize their most fundamental strategies, and thus represent themselves without the risks or the responsibilities of building history².

In 1907, the *Annuarios do Ensino do Estado de São Paulo* were created, and in 1908 they began to circulate. They were organized in bound volumes and separated by years. The goal of their creation was to report school statistics; to present and discuss new methodologies and teaching processes intended to improve the formation of teachers; and to address several issues that could contribute to education.

The volumes were composed of information from annual reports, written by the Inspectors of the Education Regional Offices of the City of São Paulo and the interior of the state of São Paulo. In turn, these reports recorded school activities of each location, such as students' attendance, stability of the teaching staff, description of educational institutions, cost of materials, teaching methods, teachers' monthly income, organization of private schools, among others. All inspectors' reports were organized in order to generate one or two volumes, which would be published every year.

The first volume included the writer's compilation on the situation of education in the state of São Paulo in the second half of the 19th century. The sources were the reports by former school inspectors that were archived at the Public Education Inspectorate.

The group that wrote the first *Anuario de Ensino* in 1907 was comprised of school inspectors from the state of São Paulo. These volumes were created because the Government needed to have documents with trustworthy information about school attendance in the state, and present a diagnosis of reality in schools in the city of São Paulo and in the countryside. The remaining volumes were signed by the Director of Public Education in charge at that moment. The need for teaching the Portuguese language and the proliferation of Italian subsidized schools in the city of São Paulo were some of their constant themes for over ten years.

1. *The city of São Paulo and the immigrant schools*

The State of São Paulo received immigrants from different ethnic groups, especially during the second half of the 19th century and the beginning of the 20th century. These immigrants landed in the port city of Santos and headed to

² *Ibid.*

the state capital – São Paulo – by train. All newly arrived immigrants – Italians, Portuguese, Spanish, Syrians, Lebanese, Hungarians, Armenians, Japanese, among others, were directed to the *House of Immigrants*, a place of reception from where the workers were forwarded to rural areas in the interior of the state.

The city of São Paulo had a rapid population growth, because many families left the coffee farms in the interior of the state for different reasons, and went to the capital to look for new job opportunities in industry and in trade.

[...] a remarkable development in the last decade of the 19th century, driven especially by the entry of foreign immigrants that had begun to arrive at the capital, attracted by the opportunities presented by a labor market in expansion and by the expectation of social ascension. [...] The foreign portion of the population accounted for more than half of its growth [...], indicating even a potentially strong Europeanization of the urban environment, since it comprised the greater part of the workforce employed in industry in positions that required a certain degree of specialization, and in the services sector, influencing habits and customs³.

The overproduction of the coffee harvest in the State of São Paulo between 1906 and 1907 is considered to have contributed to the relocation of the population from the countryside to the city. The production in excess went beyond the worldwide demand stalling new crops and, as a result, a good number of workers had to be laid off, which greatly contributed to the supply of labour. Between 1900 and 1915, there was an expansion in the number of cotton factories, wheat flourmills, hat and shoe factories, ceramics factories and carpentry in the city of São Paulo.

The city of São Paulo alone had a population of nearly 28,000 inhabitants in 1874. In 1900, it rose to 240,000, and reached a total of 477,992 in 1914.

The capital of the state of São Paulo took on the role of a political and administrative centre, and progressively started to exercise its dominance in the economic field, establishing effective networks due to the concentration of businesses and financial, commercial and industrial funds. This growth and economic diversification were accompanied by a gradual spatial expansion and demographical growth, driven by the coffee export sector, from 1870 to the 1920s, when the contours of a metropolis began to be drafted⁴.

The city of São Paulo was inserted in a unique context, because it became «the metropolis with the largest number of Italian descendants in the world during the 20th century, and it was characterized as the industrial city of Brazil in the beginning of its expansion, when the Italian component was predominant in all sectors of work»⁵.

³ R.M. Pereira, *Washington Luís na administração de São Paulo (1914-1919)*, São Paulo, Editora da UNESP, 2010, p. 132.

⁴ *Ibid.*, p. 20.

⁵ L. Biondi, *Imigração italiana e movimento operário em São Paulo: um balanço historiográfico*,

Several people from the most diverse regions of the state moved into the city of São Paulo. With this urban population growth, the foreigners had to organize themselves, as an attempt to fill in the gaps once the local government could not meet their needs. This is one of the reasons for the existence of numerous Italian private schools in the city of São Paulo in this period. The subsidized schools in this city came to attend to seven thousand students in the early years of the 20th century⁶.

The students who attended public Elementary Schools certainly lived in the neighbourhoods in which the schools were located. Many of these children were either foreigners themselves, or they were born in Brazil, but to foreign parents. Many foreigners did send their children to public schools in the city of São Paulo, as can be observed in the rolls of certain schools, despite the existence of many private Italian Elementary Schools. But, with the arrival of immigrants with school age children to the city of São Paulo, there were not enough vacancies for these children in public schools. One of the solutions found by the richer immigrant families was to send their children to Brazilian private schools. These schools, however, did not have enough vacancies either. This gave rise to the creation of many new private Italian Elementary Schools, maintained by the Italian government, or by the initiative of the community, as it occurred with the schools created by mutual-help societies.

The opening of private schools that followed the format of traditional Italian schools was very well accepted by the Italian immigrants. The schools aimed at the children's literacy in their mother tongue. They offered a «complete elementary course, one or two schools offered an additional course and an attempt of an initial classic education; most of them were composed of only one room»⁷. The opening of private Italian Elementary Schools in the city of São Paulo followed similar precepts to those existing in the birthplace of the immigrant teachers. In order to start a new school, it was necessary for the principal and teachers to submit certificates or diplomas to prove their moral and technical capacities. Besides, the school building should have sanitary and pedagogical conditions to receive students⁸.

School inspectors who visited the Elementary Schools in the capital described the difficulties that the Brazilian government had in dealing with the excessive number of foreign schools in their reports. The crucial point in such texts was the poor conditions of public Elementary Schools, which greatly contributed

in M.L.T. Carneiro, F. Croci, E. Franzina (edd.), *História do trabalho e História da imigração: trabalhadores italianos e sindicatos no Brasil (séculos XIX e XX)*, São Paulo, EDUSP, FAPESP, 2010, p. 24.

⁶ APESP, *Annuario do Ensino do Estado de São Paulo*, 1909, p. 45.

⁷ *Il Brasile e gli italiani: pubblicazione del Fanfulla*, introdução de V. Rotellini, Firenze, R. Bemporad & figlio-Fanfulla, 1906, p. 797.

⁸ M.C. Morandini, *Scuola e nazione: Maestri e istruzione popolare nella costruzione dello stato unitario (1848-1861)*, Milano, Vita e Pensiero, 2003, p. 343.

to the growth of private schools. The Italian schools in the city of São Paulo «favoured the establishment of an Italian-Brazilian identity through the teaching of the Italian language, little used by different Italian regional groups»⁹. The creation of Italian private schools supplied the lacking Elementary Schools while also increasing the dissemination of the official language.

But these schools represented a risk to the Brazilian nation, according to the reports by school inspectors in the capital. Italian students or children of Italians born in Brazil went to these schools and, consequently, Brazilian children were also educated as Italian citizens. Besides, these schools relied on Italian teachers and principals¹⁰.

The solution proposed by school inspectors to reduce the threat of these schools in the city of São Paulo was the possibility of the Brazilian government transforming all Italian foreign schools into «aids for education, but under the control of a uniform system of organization, with close operational supervision»¹¹.

The danger of the many Italian schools lay in the fact that they taught the children to love another country, and the low number of school inspectors hindered effective supervision. The solution found by one of the inspectors was that the São Paulo state government should donate materials for teaching, such as books about Brazilian History and Geography. This way, these schools would have to hire Brazilian teachers for the teaching of Portuguese, and Brazilian History and Geography. The government would shut down the school if they did not comply with such determinations.

In the capital alone, approximately 100 establishments of this nature are currently operational, with more than six thousand children registered. It remains to be seen whether such establishments, in which Portuguese is not the official language, can offer the State with real advantages as aids of the Government in providing education¹².

The argument presented by one of the inspectors suggesting the closure of these schools did not match the school reality in São Paulo at that moment. The State government did not have enough money to build new schools in a sufficient number that could meet the demands of the Italian children and the children of Italians. The central point of the issue – low public funds available for education – still remained the same since the beginning of the discussions by school inspectors in the final years of the 19th century. Due to this bleak picture of public education in the State and in the city of São Paulo foreigners,

⁹ B. Fausto, *Historiografia da imigração para São Paulo*, São Paulo, Sumaré, FAPESP, 1991, p. 40.

¹⁰ APESP, *Anuario do Ensino do Estado de São Paulo*, 1910.

¹¹ APESP, *Anuario do Ensino do Estado de São Paulo*, 1907, p. 396.

¹² *Ibid.*, p. 43.

therefore, started to open private Elementary Schools. And, as the community welcomed these initiatives, larger and more organized schools were opened.

2. The mandatory teaching of Portuguese with the purpose of building the Nation

Except for language schools, the teaching of the Portuguese language in public or private Elementary Schools in the State of São Paulo was mandatory since the enactment of a law in 1896. This law was mainly aimed at foreign schools that were created and attended by the immigrant population. But, the law was not readily observed and, as a result, teaching continued to be done in the language that the teacher had greater knowledge of.

The existing educational conflict in Brazil during the final years of the 19th century and early 20th century led legislators and educators to be concerned about the organization of Elementary Schools, as a result of the high rates of illiteracy. Legislator Rui Barbosa made his «devotion to the cause of popular education» clear. The importance of education was not only in the reforms, but in the need to put them into practice, in order to «reform the mores». In his speech, he emphasized the need for urgent action regarding the people's education, as a means for paving the way for the fulfilment of «democratic aspirations»¹³.

While education makes people civilized and fosters their improvement, its main goal is especially to enable people to govern themselves, by periodically naming the head of the Executive and the Legislative powers in their city, state or country. [...] I would be affected by inexcusable omission if I did not tell you my view of the possible ways to contribute. For being one of our greatest democratic aspirations, it needs to be done seriously and with urgency¹⁴.

We must take into account that, at that time, the Brazilian population was primarily composed of immigrants from several ethnic backgrounds, former slaves, Brazilian Native Indians and Brazilians. Considering the population as a whole, there were very few people who were literate in the Portuguese language. So, a tacit conflict between Italian private schools and Brazilian public schools started in the city of São Paulo. On one hand, there were the Italian schools that received benefits from the Italian government to continue to teach the Italian language and the feeling of love for their nation. On the other, Brazilian schools should educate their children in the Portuguese language in a country that still

¹³ R. Barbosa, *Pensamento e ação de Rui Barbosa*, Brasília, Senado Federal, 1999.

¹⁴ *Ibid.*, p. 328.

sought for their own identity due to the large number of immigrants that lived here.

Meantime, the Brazilian legislation made the teaching of Portuguese compulsory, but the law was not fully complied with, so that the subsidized Italian schools had the opportunity to teach all their content in Italian, and followed the curriculum of Italian schools. Thus, they taught – when possible – Portuguese as a second language.

According to one of the school inspectors of the city of São Paulo, the law on the compulsory teaching of Portuguese was not yet regulated in 1907. Consequently, it prevented the inspectors' isolated action to require the obligation of such education. Thus, this particular school inspector claimed the need to regulate this law as soon as possible in order to ensure the implementation of the ideal of nationalization. Under these conditions in which these schools were: «the school inspector can only ascertain whether this teaching is done or not in these schools. It is clear that this is insufficient, the inspector needs to know if these schools are nationalized»¹⁵. Until then, only one Italian school in the capital had received a few compliments from the school inspector for teaching Portuguese «according to the current program»¹⁶.

After a school inspector visited the Institute and acknowledged that the Portuguese language was being taught in the Italian Institute, the Government granted the *Dante Alighieri Institute* a subsidy, according to the existing program in the State of São Paulo. The principal, who was also the teacher, received an official certificate for performing such activities¹⁷.

One of the inspectors – the one that suggested the closure of private Italian schools for not teaching the Portuguese language – resumed the aforementioned discussion by adding that the immigrants sought foreign schools exactly because they taught the Italian Language. Also, this inspector recognized the lack of vacancies offered by the government to all children, Brazilian or foreigners. Furthermore, he wrote on the learning of Italian History as well as Italian Geography, and the result of this education was that the children learned *to love Italy*¹⁸.

On the other hand, the Italian government wanted to help with the education of the Italian child, or child of Italians, who lived outside of Italy, by sending subsidies for the school materials and the maintenance of the Italian private schools. This incentive was sent from the *Società Dante Alighieri*, which debated in their congresses on the need to maintain the Italian spirit. Reports by school inspectors of the capital pointed to the growth of Italian subsidized schools in the working-class neighbourhoods in the city of São Paulo.

¹⁵ APESP, *Annuario do Ensino do Estado de São Paulo*, 1907, p. 43.

¹⁶ *Ibid.*

¹⁷ *Il Brasile e gli italiani: pubblicazione del Fanfulla*, cit., p. 805.

¹⁸ APESP, *Annuario do Ensino do Estado de São Paulo*, 1907, p. 43.

Honourable representatives of the municipality do not forget that only in Brás (working-class neighbourhood in the city of São Paulo), according to clear statistics, more than 2,000 children who were born here attend such schools due to the lack of vacancies in the Government establishments. The name of Brazil, their homeland, is vaguely heard in the schools that receive subsidy from abroad¹⁹.

In 1913, the Director of Public Education wrote a document in which he reiterated and resumed the discussion about foreign schools and the lack of teaching of Brazilian History, Geography of Brazil and the Portuguese language. He warned educators about the measures that should be quickly taken so that the *Italianization* of Elementary Schools in the capital would not expand and not be rooted definitively in the society:

[...] imagine if such a system of schools spread in all States of the country, and in a not-too-distant future may cause the obliteration of the patriotic sentiment, which undermines or promotes the greatness of nations. Such a shortcoming in the schools cannot be understood, with the majority of their students being children of foreigners, but considered as native-born Brazilians²⁰.

The document by the Director of Public Education reinforced the need for a style of education that would look deeper at issues about Brazil. Both Brazilian History and Geography were to be highlighted by the teachers, especially those in Elementary Schools, because they interacted with children who tended not to continue to attend school for various reasons after finishing the elementary course. Thus, the teacher should have the civic duty to teach his/her students – foreigners or children of foreigners born in Brazil – about the greatness of the Brazilian territory and their illustrious characters, so that the students would be nationalized.

Considering that men are the result of the education they receive, what can we expect from future citizens to whom the knowledge of our great men, our traditions, our language, the greatness and strength of our territory, our institutions, of all these facts that characterize our nationality, is a mystery?²¹

According to this same document written by the Director, it was essential to establish regulations that required the teaching of Brazilian History, Geography and Portuguese language in foreign schools, mainly the Italian ones, because it was the government's duty «to sustain and protect the children against the evils that can derive from the absence of an education that they have the right to receive»²².

¹⁹ *Ibid*, p. 27.

²⁰ APESP, *Anuario do Ensino do Estado de São Paulo*, 1913, p. XXIII.

²¹ *Ibid*.

²² *Ibid*.

In his opinion, the education offered should relate to the social environment in which the child lived, so that he/she could be taught about the knowledge of his/her locality, his/her city, and consequently, his/her country of birth. The Director of Public Education blamed those immigrant parents who opted for the subsidized Italian schools, and the teachers who were from Italian origin in their great majority. They worked in the Italian schools by «imposing a foreign education to children, by depriving them of knowledge about their country of birth». Thus, these children would receive an «education alien to everything related to his/her country; their heart is deprived of all patriotic sentiment, the sacrosanct right to love the homeland is stolen, because they cannot love what is totally unknown»²³.

In 1914, documents resumed discussions on the compulsory teaching of the Portuguese language, Brazilian History and Geography in foreign subsidized private schools. The comments focused on foreign teachers who taught classes in schools and exactly because of their condition as foreigners did not know the specific content of these subjects to teach the children. Once again, one of the documents discussed the regulation of the law that made teaching these subjects compulsory, but as it had not yet been put into practice, omissions continued to occur.

In general, our language is taught by foreigners who do not know it, and consequently it is distorted in its terminology and syntax, so it can be anything but Portuguese. In the capital, there are many schools where no one speaks a word of Portuguese during classes. They are not language schools, however, but elementary ones, intended for the education of children. These children, who will influence our destiny as Brazilian citizens, are an integral part of our nationality, by birth or by nationalization²⁴.

3. *The curriculum in precarious Elementary Schools in the city of São Paulo*

Public Elementary Schools in the city of São Paulo were maintained by the State government. The schools that existed in the capital in the beginning of the 20th century had shortcomings in their operation. The problems found in their development relate to the physical space, teaching materials, teacher formation and the diversity of teaching methods applied. These professionals received vast criticism from school inspectors. The physical space for the school was usually inappropriate, since it consisted of one or more rooms in a family's home, in this case, the teacher's family. One of the school inspectors presented a solution to the situation:

²³ *Ibid.*

²⁴ APESP, *Anuario do Ensino do Estado de São Paulo*, 1914, p. 20.

the first action to be taken and which requires prompt implementation is the construction of school houses, in accordance with the precepts of educational sanitation. [...] The onus that weighs on the modest salaries of teachers with the rental of school rooms obliges the teacher to reduce such expenditure, by looking for small rooms, worthless in all respects, with flagrant sacrifice of sanitary requirements and contempt for pedagogical rules²⁵.

Another consideration was the lack of proper furniture for these schools. Benches, wooden boxes, improvised tables and different types of chairs often provided by the students' parents were used. A research performed in an Italian colonial community in the end of the 19th century on the outskirts of São Paulo showed that both the male and female Elementary Schools were in very precarious situation²⁶.

In 1907, school inspectors' reports presented certain considerations about Elementary Schools in the city of São Paulo. They criticized their disaggregation, because «they do not form integral parts of a harmonic whole, they cannot be considered as related components of an instrument with a general function that will be the integration of many specialized functions»²⁷. Another point mentioned was the lack of materials for these schools and their unequal distribution. The inspector also added that most of the schools operated only with roll call books. A uniform distribution of teaching materials to all schools was necessary. This would contribute to reducing the number of parents that would send their children to private Italian schools, but this situation persisted due to the contrast with public schools; the inspector explained that «the Italian schools are especially preferred by parents. The Italian government protects and assists the schools maintained by the colony while the State abandons them completely»²⁸.

The discussion and criticism on the precariousness of Elementary Schools began to increase after the transfer of the Portuguese Court to Brazil in the beginning of the 19th century. Since the creation of this kind of school, many flaws were observed but few were actually corrected. One of the school inspectors recorded his considerations about the instability of the teachers in Elementary Schools, because these teachers took the positions in these schools to begin a career more than to:

²⁵ APESP, *Anuario do Ensino do Estado de São Paulo*, 1910, p. 50.

²⁶ E. Mimesse, *A educação e os imigrantes italianos: da escola de Primeiras Letras ao Grupo Escolar*, 2. ed., São Paulo, Iglu, 2010.

²⁷ APESP, *Anuario do Ensino do Estado de São Paulo*, 1907, p. 15.

²⁸ *Ibid.*, p. 396.

take care of his/her unique and special mission to teach and educate. Parents do not send their children to school because they know that, during the school year, there will be two or three teachers in town, and in the interval between their nominations there will be forced vacation of three, four or more months, not to mention the leaves of absence caused by the teachers' discouragement²⁹.

Thus, public Elementary Schools could not deal with the demand of students of school age in the city of São Paulo. This favoured the expansion of Italian private schools in the working-class neighbourhoods of the city. Despite maintaining the character of private schools, the Italian schools, however, received subsidies and were not that different from public schools in regards to physical structure or school organization.

Italian private schools were in the teacher's home, which were also the principals in most cases. Subsidized schools were initially located in rental houses. These schools had a few rooms to accommodate the teacher's family and other rooms used for classes. The largest room of the house featuring an easy entry would become part of the school for boys or for girls. Each school occupied just one room with students of different ages and levels of knowledge, exactly as it happened in public Elementary Schools of the capital. Some models of houses were preferred for the coexistence of the teacher's family and the school operation: they were two-story houses with an open place in the backyard for physical activities and recreation of the children. These houses were ideal for schools, because the students could be separated by gender on different floors of the building. Some of the researched documents mentioned that the girls would occupy the upper floor and the boys would be on the lower level.

In the subsidized Italian schools – and in the public schools – a male teacher was usually in charge of the school for boys, while his wife or daughters were in charge of the school for girls. But after some time, these schools began to receive a greater number of students, which made the owner seek other buildings for the schools – for both boys and girls – and hire new teachers in addition to their close relatives. As observed in the researched documentation, up to that time all the staff members of these schools were Italian, or were children of Italians with fluency in the language spoken in the region of origin of their families.

In this context, the imposition of teaching the Portuguese language was increasingly more necessary. Although all the Italian residents in the city of São Paulo were recognized as Italians, they lived in neighbourhoods where they identified themselves regionally to other residents, giving rise to the use of other languages in daily life. The predominant Italian population in the neighbourhoods of the city of São Paulo was from Calabria in Bexiga; from Veneto in Bom Retiro and from Naples in Brás³⁰.

²⁹ APESP, *Annuario do Ensino do Estado de São Paulo*, 1910, p. 107.

³⁰ A. Trento, *Brasile*, in P. Bevilacqua, A. de Clementi, E. Franzina (edd.), *Storia dell'emigrazione*

In the early years of the 20th century there were more than 80 private schools subsidized by the Italian government in the city of São Paulo. These schools were supposed to follow the teaching curriculum that was established and practiced in Italy at that moment, in addition to maintaining the teaching of Portuguese language in their programs. All of these schools offered elementary education, and some of them also had evening classes, physical education classes, preparatory courses for higher education, handicraft classes, and language classes, among others.

The subjects taught in schools were to include the teaching of the Italian language, because of the need to promote awareness of the Italian language based on a linguistic experience, aimed at learning its proper use, and also developing and maintaining a national sentiment. The curriculum of some of the Italian subsidized schools in the city of São Paulo was composed of: Reading, Writing, Religion, Handwriting, Grammar, Physical Geography, National History, Concepts of Physics and Natural Sciences, Arithmetic and notions of the Metric System³¹.

None of the subsidized schools studied for this article identified the teaching of the Portuguese language, History or Geography of Brazil, in spite of the new mandatory rules of 1904 that demanded such teaching in foreign schools, accompanied by threats of supervision made by school inspectors³².

In all educational curriculums in effect in the schools of the city of São Paulo for public or private Elementary Schools, there had always been a concern about the emphasis on teaching the Portuguese language. The curriculum discussed in the inspectors' reports of 1907 listed the subjects that should serve as a standard for public Elementary Schools, and it included the following subjects: Reading, Language, Numbers, Handwriting, Geography, History, Animals, Plants, General Lessons, Drawing, Music, Handiwork and Gymnastics³³.

This curriculum was similar to the one adopted by the Italian subsidized schools with few differences. Among them was the omission of the Portuguese language.

In their reports, some of the school inspectors argued in favour of the need to reduce the existing content in the curriculum of Elementary Schools. These inspectors believed that the accumulation of subjects offered interfered in the student's attendance to school. As a result, students dropped out of school as soon as they learned to read and write. They did not stay in school for more than three years. Inspectors argued that only the «subjects of greater usefulness such as Reading, Oral Language, Writing and Arithmetic» should remain in the

italiana: arrivi, Roma, Donzelli, 2002, vol. 2, pp. 3-23.

³¹ APESP, *Annuario do Ensino do Estado de São Paulo*, 1907.

³² P. Salvetti, *Immagine nazionale ed emigrazione nella Società "Dante Alighieri"*, Roma, Bonacci, 1995.

³³ APESP, *Annuario do Ensino do Estado de São Paulo*, 1907, p. 122.

curriculum³⁴. A report by one of the school inspectors also pointed out that the main concern of Elementary Schools should be the language. This should be regarded as the centre of all teaching programs at all levels. Activities should be directed to the learning of words and writing, and to contribute to an organized, safe and clear expression of ideas. In truth, the idea was to avoid the excess of grammar rules of the Portuguese language and to favour a more frequent use of the reading book as a great help in language learning. Thus, according to the school inspector, only reading and comprehension would help children learn to speak well and to write compositions³⁵.

The Public Education of the State of São Paulo underwent reforms after the Proclamation of the Republic in 1889. Based on Law 88 of 8th September 1892, a reform of Public Education was implemented. The curriculum of this law included: Moral Practice and Civic Education; Reading and Principles of Grammar, Writing and Handwriting; Notions of General Geography and Cosmography; Geography of Brazil, especially of São Paulo; History of Brazil and reading about the lives of great men in History; Arithmetic on whole numbers and fractions, Metric System, Concepts of Geometry, especially in their application to measurement of surface and volume; Notions of Physics, Chemistry and Natural Sciences in their most simple applications, especially hygiene; Free-hand drawing; Singing and Reading Music; Gymnastics, Handiwork and Military activities according to age and gender. The inclusion of Moral Practice, Cosmography, History of Brazil and Handiwork and Military activities was one of the ways to consolidate the formation of character and values of Elementary School students.

For Elementary Schools, this set of subjects demonstrated what popular education meant for republicans in São Paulo. Educating, more than instructing, was the fundamental purpose of elementary education. This differentiation was emphasized by several educators at the time and it was not a matter of semantics. It showed a clear concept of education – educating involved a commitment to the integral formation of the child that went far beyond the mere transmission of information supplied by instruction. It essentially meant a formation of character through learning social discipline and moral virtues, as well as civic and patriotic values necessary to the formation of nationalism³⁶.

School inspectors criticized the extent of the curriculum in 1892 and the difficulties teachers had to cover all of the proposed items. Thus, the curriculum was slightly modified in 1904, with a small reduction to the content to be taught. The new teaching program prioritized: Moral and Civic Education; Reading, Writing; Arithmetic; Notions of Physics, Chemistry and Natural Sciences; Drawing; Singing and Music. When verifying the reports submitted to the

³⁴ APESP, *Anuario do Ensino do Estado de São Paulo*, 1908, p. 14.

³⁵ *Ibid.*

³⁶ R.S. Souza, *Alicerces da Pátria: história da escola primária no Estado de São Paulo (1890-1976)*, Campinas/SP, Mercado de Letras, 2009, p. 83.

Director of Public Education, it was evident that the teachers prioritized Reading, Writing, Handwriting and Arithmetic in their practice because these subjects were considered to be fundamental to the children's learning. Some subjects enriched the curriculum in the end of the 19th century, but not all the subjects remained in classrooms in the 20th century.

When the classroom was composed of students from different ethnic groups, children of immigrants, or even foreigners, the teacher's priorities were the Portuguese language, Reading, Writing and Handwriting. Portuguese grammar studies were only taught to students with greater knowledge of the content. The curriculum was revised again in 1911 and included the teaching of the same subjects. The difference was the depth and breadth of content: Reading, Language, Arithmetic, History of Brazil, Geography, Natural Sciences (animals, plants, and general lessons), Handwriting, Drawing, Singing, Handiwork and Gymnastics. The programs tended to emphasize the teaching of Handwriting, because this subject was understood to be an aid to language teaching.

In Elementary School, handwriting was an educational activity that shaped behaviour. Writing correctly and legibly (preferably cursive and with elegant traces) meant to demonstrate the possession of an erudite culture. [...] Great emphasis has been given to handwriting, composed as an equivalent to writing or to the art of writing well³⁷.

Final Considerations

From the end of the 19th to the early 20th century, the curriculums approved and put into practice in the State of São Paulo prioritized the teaching of subjects such as Portuguese, History, Geography, Moral and Civic Instruction and Physical Exercises. These subjects always aimed at the development of the feeling of nationalism and patriotism in Elementary School students. Thus, they would contribute to the moral formation of the population of the State of São Paulo and also to the construction of a national identity.

Despite the existence of many subsidized public and private Elementary Schools in the State of São Paulo, we cannot assume that the majority of children of school age, foreigners or children of foreigners, attended school during the years analysed herein. What we did observe, however, was that many Italians, as well as their children, were present in classrooms of public Elementary Schools of the capital, based on the analysis of rolls of these schools. Thus, we cannot say that the Portuguese language was taught thoroughly, despite the existence of a law mandating it and the constant discussion of it through the reports of school inspectors.

³⁷ *Ibid.*, p. 109.

Fundamentals of John Dewey's concept of civic education

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ABSTRACT: This theoretical study focuses on the philosophical, sociological and political fundamentals of John Dewey's concept of citizenship education. The starting point of this paper is the fact that Dewey's concept of citizenship education was one of the most important in this period, as well as the fact that its influence on the development of educational theory and practice and beyond is still present. The study is aimed at examining the substance of Dewey's basic ideas of civic education and within it the attitudes towards national identity, society and state. To achieve this goal, we started from the analysis of Dewey's vision of reconstruction, progress and the relationship between philosophy, education and society, and moved onto the issues of democratic methods, political and educational (neo)liberalism, freedom, the individual and individuality in society and education. We conclude that the role of civic education was indispensable and fundamental when it comes to the development of Dewey's view of the individual, society, state, democracy and education, and that impact of the two was reciprocal.

EET/TEE KEYWORDS: John Dewey; Pragmatism; Democracy; Society, Civics; Identity; XIX-XX Centuries.

Introduction

John Dewey (1859-1952) is one of the creators of pragmatic philosophy and the creator of pragmatic pedagogy, whose ideas have made a considerable impact and who has been an inspiration in many fields of education and teaching, but also in social and political life in general. To understand and analyse Dewey's pedagogical ideas, or study their direction, context and essential characteristics of very great importance is his conception of and orientation towards a civic education. Its origin and basic concepts may be found both in the works of Dewey which were very diverse and numerous, as well as in the social circumstances

of the time and decisive events in the history of the United States, the world, and his professional and personal life, which all determined his overall attitudes towards issues of national identity, society and the state in general.

The focus of this theoretical study was to analyse the philosophical and socio-political foundations of John Dewey's concept of civic education. The starting point of this work is the fact that Dewey's concept of civic-oriented education, which was created and developed during the second half of the nineteenth and the first half of the twentieth century was one of the most important in this period, and that its topicality, relevance and impact on the development of pedagogical theory and practice and beyond are still alive. In achieving the objective of reviewing the substance of Dewey's basic idea of the concept of civic education we set off from the analysis of his vision of reconstruction, progress, and the relationship between philosophy, education and society. We further study the issues of democratic methods, political and educational (neo)liberalism and individual freedom and individuality in the society and education. In doing so, we have tried to continuously keep in mind the multidirectional and complex connection between the basics of Dewey's philosophical, sociological and political ideas, essential for the understanding and analysis of his concept of civic education.

1. *Dewey's definition and function of philosophy*

Dewey is primarily, essentially and always, even in a developmental-chronological sense, a philosopher, and all his other teaching and practicing of the related sciences was based on his philosophical ideas and a multidisciplinary approach to the study of reality and concrete life problems. Being a modernist and an opponent to the old metaphysics, he emphasized that the most important task of a philosophy is to make sense of people's ideas of current social and moral issues. According to him, the task of philosophy is essentially a socio-pedagogical one: it can and should serve the building of a better man and a more righteous democratic social order. Moreover, Dewey's view that philosophy is essentially a general theory of education¹ stemmed from the belief that social philosophy contains the philosophy in its entirety, and that social philosophy as a whole underlies the philosophy of education². So, Dewey's thought contains an unbreakable bond between philosophy, society and education, and if they are democratically aimed, among other matters, they also entail a civic orientation.

¹ J. Dewey, *Democracy and education*, New York, The Macmillan Company, 1916, p. 383.

² G. Dykhuizen, *The life and mind of John Dewey*, London and Amsterdam, Feffer and sons inc., 1973, p. 179.

What for Dewey are the functions of philosophy or what in short is philosophy? Ivan Babić³ believes that for Dewey this is primarily a function of culture in the broadest sense of the word. According to Dewey himself, the subject of philosophy grows from the pressure and tension within the community in which a certain form of (life)philosophy appears. Accordingly, its specific problems vary with changes in human life, which always progress in human history, occasionally constituting (and constructing) the crises and turning points⁴. Accordingly, it seems that Dewey himself was fully aware that both his philosophy and pedagogy were largely a reflection of the circumstances, the spiritual climate, and the life in the United States in the late nineteenth and early twentieth century. Here, philosophy in general is always created primarily as a result of social and emotional, and not (primarily) of the intellectual. It, according to Dewey, is not a passive reflex, it is a change itself⁵. Philosophy is a synthesis of tradition and a sign of (pre)changes and the product of the social crisis or problems. Philosophy is a synthesis, but always adapted to time, new scientific aspirations and political developments. It is this characteristic of it that can be significant and serve the development of a society. According to Dewey, philosophy does not only concentrate on the investigation of the facts, but it would be good for it to include a critical purification of values of objectively given experience and design, i.e. postulation of new humanistic solutions of particular social and cultural situations. So, philosophy requires a new bond with the old, not disparaging everything that is foregone, but insisting on the renewal, continuity and progress.

Dewey's central philosophical concept of experience, by the use of which he was seeking to avoid a dualism of perception and objective reality, is essential to a social and educational process. «Method of intelligence», which he considered to be a manager of experience, is the most practical and fulfilling in the application of social and political activities, the areas where education is the main instrument of action⁶. Generally speaking, Dewey's position was far from the idea of philosophy as an academic discipline which is separate from the involvement in human activities and affairs. It was rather in line with his famous definition of philosophy from his work *Democracy and education*, i.e. that philosophy is a theory of education as a deliberately conducted practice⁷. Namely, the philosophy is for Dewey a general theory of education based on the practice of free individuals and democratic social efficiency and cooperation.

³ I. Babić, *Politichka teorija instrumentalizma* [The Political Theory of Instrumentalism], Zagreb, Liber, 1971, pp. 14-16 (in Croatian).

⁴ J. Dewey, *Reconstruction in Philosophy*, New York, Mentor Book, The Beacon Press, 1954, p. 8.

⁵ J. Ratner (ed.), *Intelligence in the Modern World*, New York, Random House, 1939, p. 250.

⁶ S.M. Dworkin, *Dewey on education*, New York, Teachers college press Columbia University, 1959, p. 7.

⁷ Dewey, *Democracy and education*, cit., p. 387.

The role of (philosophy) education in the development of society and democracy in Dewey's thought is indispensable and fundamental, and their influence is viewed as interconnected.

2. *Reconstruction of philosophy of education and society*

Through laws and measures, through social discussion, a society can regulate and shape itself in a more or less random manner or possibly a progressive direction. According to Dewey, through education a society can substantially and (in the largest extent possible) precisely formulate its own purposes, determine its goals and means and in this way develop itself clearly and economically in the desired direction. Education thus acquires the features of the best and closest connection achievable between the science and the arts in human experience. In addition, for Dewey, the value of education and pedagogy is determined by their success in improving the integrity of the experience, the spirit of cooperation and ease of interaction in the community⁸. Each cooperative research, according to Dewey, should be understood as a social action. 'The social' in social pedagogy can be understood in its full sense, as occasions in which the connection between people enables greater understanding of the consequences of particular systems, theories and decisions. The consequences are ideally studied in the context of the consequences that apply to all people. They are always associated with how the people are affected by certain decisions, not just specific groups. In doing so, Dewey held that social consequences are worthy of serious consideration of adaptation and habituation, because they are important lessons for life and that such consequences may belong to issues for further consideration depending on whether they can be useful to us or not⁹.

Individual freedom in (education and) stimulation of its original proposals and suggestions without loss of general social stability is necessary to ensure the progress in the reconstruction of common social disharmony or any other environment. In doing so, it seems that for (both the pragmatists and) Dewey the organized political power and social (self)control is necessary, it is even necessary to remove the existing out-dated solutions, conditions, and provide

⁸ J.W. Meyer, *Ricoeur's Hermeneutic Theory and Dewey's Educative Process: Pedagogy for Reflective Social Understanding in a Global Context*, Thesis in Education Dept., University of Toledo, advisor Lynne Hudson, A.Y. 1999, p. 72.

⁹ J. Dewey, *What is a social study*, in J. Boydston (ed.), *The Later Works of John Dewey 1925-1953*, 37 vols., Carbondale, Southern Illinois University Press, Vol. 13: 1938-1939, *Essays; Experience and Education*, 1988, p. 338. From now on all reference of items are indicated as LW (*The Later Works of John Dewey, 1925-1953*, 17 vol.), MW (*The Middle Works of John Dewey, 1899-1924*, 15 vol.) and EW (*The Early Works of John Dewey, 1882-1898*, 5 vol.) followed by volume and page numbers.

the new opportunities for individual and collective development under the continuously emerging and changing circumstances¹⁰. Accordingly, Dewey emphasized the importance of the correct type of education in a society that is seen as democratic and civil. Of course, we must not forget that education, too, can and must be understood as an essentially secular process of experience, the one that involves the community, teachers, students, working materials and resources.

3. *Democracy and the need for democratic methods*

For Dewey, democracy is much more than a form of political organization. It is primarily the way people live together and share their experiences. At the same time, the extent to which a certain society is democratic may be measured by two criteria: first, by the quantity and value of common interests, and second, by the amount and intensity of its discussions¹¹. Thus, Dewey's concept of participation in a democracy differs from the usual visions pertaining to formal political representation. Participation in a democracy (and democratic life and education) is a common, communicatively dynamic thing and a research process.

Dewey believed in the united democracy. For him, democracy is intended for all of the society members, i.e. the citizens, and should be based on communication, cooperation and interaction between all individuals whose survival depends on mutual consensuses. In addition, democracy should be adorned by tolerance. Moreover, one's coexistence primarily depends on the level of his/her tolerance. Recognising the human weaknesses in his analyses and life, Dewey remained optimistic and treated the instances of human weakness with tolerance.

Dewey believed that democratic outcomes require democratic methods, ex. the methods of consultation, convincing, negotiation, cooperative intelligence, which should be practiced in politics, economy, education, i.e. in our culture in general. Moreover, democracy could be used as a continuous or daily adaptation and portable permeation at every stage of our everyday methods that correspond with the outcomes to be reached¹². So, democracy as a method or a principle of life surpasses the narrow confines of political processes and establishment.

¹⁰ M. Baum, *Pragmatism*, in R.B. Winn, (ed.), *American philosophy*, Philosophical library, New York, 1955, p. 168.

¹¹ J. Berding, *John Dewey's participatory philosophy of education*, doctoral dissertation, Amsterdam, Vrije Universiteit, 1999, p. 74. (Published in Dutch: Joop W.A. Berding, *De participatiepedagogiek van John Dewey. Opvoeding, ervaring en curriculum*, Leiden, DSWO Press, 1999).

¹² LW, Vol. 14, pp. 367-368.

Otherwise, one cannot rely solely on the list of the so-called democratic activities in order to determine whether a group or society is democratic or not¹³. At the same time, the process of enabling and encouraging democratic methods should exist and be continually developed as life and shared democratic values that attain their outcomes through democratic procedures in and with the support of a democratic society and policies which they reflect.

In the course of his long career, Dewey was searching for the identification of challenges of democracy, under which he assumed the current education of citizens engaged in social research¹⁴. According to him, the active, socially supported, participation of individuals in daily questioning, research, negotiation and cooperation as a means of developing a democratic community and life can thus become common outcomes and values. Advocating for a progressive development and experiential application of intelligence, Dewey did not offer a crystal ball, some preconceived solutions, formulas, procedures for decision-making, not even a method¹⁵. The problem of a method is to create conditions that can stimulate the interest of (students and/as) citizens on the common social aspects of life, to stimulate curiosity, foster and guide it and help the individuals make connections between the known and the unknown, the new and prior knowledge and understanding.

4. Democracy and civic orientation as an ideal, practice and condition of freedom

Having realised the importance of the relationship between education, society and democratic ideals, following the tradition of the English empiricists, Dewey dealt with the political philosophy, the theoretical, but also the practical level, i.e. through his work and involvement in the life of political parties and the treatment of international issues. For him, democracy was an ideal and a prerequisite to freedom, both in education and society as a whole. In doing so, it is important to point out Dewey's significant viewpoints within his concept of democracy and civic orientation in the context of his political philosophy and its impact on the pragmatic pedagogy, or seeing democracy as a 'dam' for the interests of citizens, social studies and a manifestation of individuality.

¹³ M. Eldridge, *The teachers Union fight and the Scope of Dewey's logic*, in F.T. Burke, D.M. Hester, B.R. Talisse (edd.), *Dewey's logical Theory*, Nashville, Vanderbilt University press, 2002, p. 270.

¹⁴ See R.W. Hildreth, *Living Citizenship: John Dewey, political theory and civic engagement*, Thesis in Political Dept., University of Minnesota, advisor James Farr, A.Y. 2005.

¹⁵ J.W. Meyer, *Ricoeur's Hermeneutic Theory and Dewey's Educative Process: Pedagogy for Reflective Social Understanding in a Global Context*, Thesis in Education Dept., University of Toledo, advisor Lynne Hudson, A.Y. 1999, p. 81.

For Dewey, democracy, as a political model and a process, implies the protection of the interests of the people. At the same time, in his work *The Public and Its Problems*, he points out that the most important step that should be done in the name of political democratic forms as such (elections, laws, etc.) is running the consultations and discussions that take into account social needs and problems in a democratic decision-making process¹⁶. This process as a public event reflects the needs of a society onto those who manage or implement the management of the society and the state. In addition to the high degree of awareness of the necessity and openness to a public debate, the democratic approach and process greatly minimize a potential misuse, neglect, isolation and division of the community, protecting the interests of the citizens. All this led Dewey to the understanding of democracy as a form of social research through a public discussion as the best way of relating to different interests in the society. In his work *Liberalism and Social Action*, Dewey points out that the method of democracy, if intelligently organized, consists of presenting different views and aspirations, trying to see where specific requirements can be discussed and arbitrated in the light of more comprehensive interests that go beyond the individual ones¹⁷. Thus, the aim is not only to find a common denominator, but a quality more. Also, as much as defining goals and achieving them is important, the procedures and discussions that precede them are also important. Democracy is not only an appropriate model which we use to achieve our interests and goals, but also a specific type of activities through which we define and redefine our own and common interests and goals. This process Dewey sees as exploratory, experimental, critical and self-critical, although a significant part of the state, social and political apparatus does not, will not or cannot have the same characteristics and essence. According to Dewey, on the road to achieving the common good, such a joint experimental and active spirit of a free individual can only exist in a democracy, a civil society, establishment and education. In his work *The Public and Its Problem*¹⁸, Dewey analyses the relationship between the individual and the group to which it belongs in the context of democracy. From the standpoint of the individual, it (democracy or democratic nature) consists of a responsible share in accordance with the possibilities in creating and managing the activities of the groups to which one belongs and participation in accordance with the needs and values that these groups represent. From the position of the group, it requires realization of the potential of the group members in accordance with the interests of the benefit to each separate individual. The full realization of expression, potential and freedom of the individual can be achieved only in a democratically-ordered

¹⁶ LW, Vol. 2, p. 364.

¹⁷ LW, Vol. 11, p. 56.

¹⁸ LW, Vol. 2, pp. 327-328.

society and life model, i.e. the one in which social conflicts and interests are treated as an object of social research.

5. Political, ethical, scientific and educational (neo)liberalism and experimentalism

Dewey's political philosophy is in accordance with his stances on education. Thereby, it is important to emphasize two kinds of backgrounds which are important for the understanding of Dewey's political philosophy and its connection with the pragmatic pedagogy of the civic orientation. The first important condition for the formation of his ethical and political thought is idealistic and neo-liberal attack on individualism of classical liberal tradition¹⁹. The second condition is Dewey's research concept.

At the beginning of his intellectual development, Dewey accepted the traditional liberalism in the part related to the concept of the individual, which according to the new liberal thought was ethically harmful in its effects. In this way, many of the themes that characterize Dewey's thought about the social and political theory, after his turning towards experimentalism, were presented in his idealistic political philosophy which was open earlier. In his essays such as *The Ethics of Democracy*²⁰ and *Christianity and Democracy*²¹, Dewey creates his own version of idealistic criticism of the classic liberal individualism. He points out that classical liberalism envisions a society just as the sum made up of individuals connected externally, and the individual as an independent entity in competition with other individuals. Dewey strives towards social and political life as an area in which those competing tendencies of interests are harmonized. An idealistic and neoliberal stance rejects the vision of social and political life as incorporating the essential conflicting personal interests. Instead, individuality can be established only where the social life is considered to be an organism in which the well-being of every part is connected to the well-being of the whole. George Dykhuizen²² points out that Dewey considered society an organism whose members are connected with common goals, interests and ideals, and therefore, realization of individual personality is possible. This enables

¹⁹ See D.C. Sui, *Reconstructing Liberal Democracy: John Dewey's Critical Political Philosophy*, Thesis in Political Science Dept., Harvard University, advisor Seyla Benhabib, A.Y. 2004; K.S. Decker, *Naturalistic and Aesthetic Individuality in John Dewey's Political Philosophy*, Thesis in Philosophy Dept., Saint Louis University, advisor Vincent Punzo, A.Y. 2004.

²⁰ EW, Vol. 1, pp. 227-249.

²¹ J. Dewey, *Christianity and Democracy*, in F. Kelsey (ed.), *Religious Thought at the University of Michigan*, Ann Arbor, University of Michigan press, 1893, pp. 60-70.

²² G. Dykhuizen, *The life and mind of John Dewey*, London and Amsterdam, Feffer and sons inc., 1973, p. 51.

individuals to find their appropriate place in the community and to participate freely in the broader social life, which is the closest to that of a democratic society. In fact, Dewey represents individualism in a democracy which is moral and not numerical or collective. It is an individualism of freedom, responsibility and initiative for ethical ideals, and not individualism of licentiousness and lawlessness²³. Therefore, freedom consists not only of the absence of external constraints, but of positive participation in an ethically desirable social system. Dewey points out that a human being is not isolated as an unsocial atom, but he/she only becomes human when he/she gets in a real contact with other persons, and that relationship represents them so that they are organically referred to each other or are obsessed with unity of purpose and interests²⁴. Therefore, democracy and harmony are possible only by means of freedom, tolerance, empathy, cooperation, activity and equality.

According to Dewey, the possibility that the elite, i.e. the chosen few, the wise or enthroned ones determine what the public interest is, is usually distorted by their position in the society. Democratic participation of all citizens is not seen only as prevention against the possible bad management by the elite, but also as an aspect of individual liberty. Moreover, democracy is not simply and solely a form of establishment, but a social and personal ideal, the way of living together, a kind of associated, connected experience. In Dewey's opinion, philosophy is a critical future-oriented culture of humanity and strives to be a unique 'filter' of scientific, cultural and social human development. Since democratic society rejects the principle of external authority, it must find a replacement in the voluntary order and interest, which can only be created by upbringing²⁵. Namely, increasing individualisation, on the one hand, and a broader community of interests on the other hand, are possible provided that intellectual possibilities are made accessible to all the citizens under equal and accessible conditions. In other words, democracy is not only an asset of political institutions, but of a broad range of social relations. That ideal is common to various social fields, and according to Dewey, it should have industrial i.e. production forms, in the same way as it has civil and political forms²⁶. In order for that ideal to be effective, citizenry with broad democratic education is required. Unequivocal emphasis of the latter in Dewey's earlier works can be found in his tendency to provide a ramified and ideal meaning by using the means of democracy. Dewey's idea of democracy should be seen as a form of relations which extend through various fields of social life and unify them.

While idealistic and neoliberal critique of individualism is an important segment of the origin and the basis of Dewey's political philosophy, it should be

²³ EW, Vol. 1, p. 244.

²⁴ *Ibid.*, pp. 231-232.

²⁵ Dewey, *Democracy and education*, cit., pp. 101-102.

²⁶ EW, Vol. 1, p. 246.

considered in relation with the roots of his later conception of the research. A characteristic and central theme of Dewey's epistemology was a rejection of the observational theory of learning. In that kind of theory, learning is seen as the model of observation of the motionless and independent objects on the part of the observer. The observer acquires knowledge by seeking for certainty. That is a search for fixed and final foundations. According to Dewey, every philosophy aimed in that direction ignores the reality of suspense of current processes in life and nature, denying the conditions from which they derive²⁷. Namely, he was trying to replace that conception with the theory of research, understanding it as a 'battle' of human intelligence in the process of solving problems. Research is not about obtaining a certain image about the nature of things, but about the inevitable conditional solutions to the practical and intellectual problems by which the research begins. Dewey sees research as problem-solving, as historical, progressive, and public, i.e. belonging to the community. Participation in researching independence is a realistic approach which never ceases and which does not relate to the incorrigible problems and situations. The primary goal of the research is to solve the problematic situation, and not to change the beliefs or lore of the researchers. Dewey reckons that natural and technical sciences, chiefly by virtue of their experimentalism, are the model, the possible standard and they have a result in their progressivity and sum, so they provide us with a greater possibility to take control over nature. Progress significantly determines the experimental approach to studying the reality and the problem, during which new hypotheses and theories are formed and reassessed, and the methods used during the process and the standards for their evaluation are not everlastingly and ultimately fixed. According to Dewey, the research findings is what is valued as knowledge, but defined as the product of the competent research²⁸. Likewise, Dewey sees research as either social or public. Namely, the findings must be subject to evaluation and reassessment on the part of other researchers, i.e. the researcher in certain area demands information about the experiences of his colleagues in order to be able to confirm and amend his own results²⁹. Accordingly, almost in every field of social, ethical, political, scientific, educational life and work, the individual and social character of the research represents its indispensable part. Dewey's conception of research strives for realising itself as the basic pattern of critical and reflective intelligence, and it opposes *a priori* the difference between, for instance, research in natural sciences and the one in the areas of ethics and politics, philosophy and education.

²⁷ J. Dewey, *The Quest for Certainty*, New York, Minton, Balch and Co., 1929, p. 244.

²⁸ LW, Vol. 12, p. 16.

²⁹ *Ibid.*, p. 484.

6. *Freedom and individuality*

Being an optimist by nature, Dewey believed in the development of human power, individuality, freedom, and the realisation of common ideals. In his time, American faith in progress was not based on history, but on the trust in human strength and natural resources³⁰. According to many, that was more of an advantage than a disadvantage. Dewey deemed that the philosophy in the United States of America will be lost by wavering between survival of the American heritage and formalism, unless it would, somehow, come to a consciousness of the American needs and of its necessary principle of a successful action³¹. Dewey was one of the creators of such an activist philosophy, which saw democracy not only as a polity, but also as a way of life in a community. It was based on the ideas that personality and freedom, per se, were products of the society, that the democratic society was one which subjugated its institutions to one main aim: to allow its members to develop intellectually by broadening the spheres of common interests, improving the means of communications, and public expressing and enabling everybody to participate in the development of social and physical control³². Dewey also applied this ideal to his vision of reform and orientation towards a civic conception of education. On the one hand, he developed his philosophy mostly within the frames of significant political and economic questions of the society and the state, and, on the other hand, he built a social philosophy on the ethics of self-realisation and within his new individualism. Thereby, he pointed out that the community's activity and public experience were necessary for one's freedom and understanding of one's needs and interests.

For Dewey, the development of an individual, his/her individuality and freedom is not in absence of limitation of its expression and progress. He sees the foundation of absence, of undeveloped and disrespect of individualism in the absence of positive and affirmative possibility or our power to be individualised on our own³³. To have rights and to be protected by them is not enough, neither for achieving one's goals, nor for the existence of one's freedom. Having in mind that an individual is always a product of social interaction between a conscious organism and its environment, it is always necessary to consider the organised social, political, economic, educational, and other activities which affect the development of an individual. With recognition, acknowledgement and participation in institutions and procedures which determine the social, political, economic, and educational policies and trends, every citizen can develop in a democratic way, through responsibilities and consequences

³⁰ H. Schneider, *Istorija americhke filozofije* [The history of American Philosophy], Cetinje, Obod, 1971, p. 204 (in Serbian).

³¹ J. Dewey et al., *Creative intelligence*, New York, H. Holt and Co., 1917, p. 67.

³² Schneider, *Istorija americhke filozofije*, cit., p. 206 (in Serbian).

³³ LW, Vol. 2, p. 329.

emerging from common activity and cooperation. Tolerance, compromise, discussion, argumentation, and openness are necessary for solving conflicts and disagreements in all areas of life. In that case, there is neither sense nor need for methods of convincing through compulsion, propaganda, and a totalitarian state.

Dewey's vision of freedom as individuality is complex, and he, of course, connects it closely, among other things, to his concept of research. Namely, an individual should be ready and capable of making, analysing, and then reassessing his/her decisions, all of which construct its freedom. According to Dewey, an individual's expressing through an intellect, which is active, critical, and self-critical in its choices, is the most typical activity of ours³⁴. It is an extremely serious and important process, and an essential reflection of experimentalism and instrumentalism, which Dewey regards as important in various forms and areas of human activities. Moreover, for an individual, the prediction of future alternatives and the capability of judging in choosing one of them determine his/her chances in a struggle for future existence, they determine their freedom³⁵. Also, liberty as a form of individuality implies its social dimension, i.e. the active shaping of social terms and participation of all citizens in creating the terms of public life. An individual can achieve its full potential and freedom by indulging in creative communication and collaboration with others³⁶. In so doing, individuality as such, should be helpful to itself and the community. Development of personality, its freedom and intellect, through innovations and experiments, reflects on the development of a society in general. This implies the importance of equality and possibility for all the citizens to have, not just opportunities, but also potential to respect one's own and other's contributions to the society. It is important at the same time to highlight that even though Dewey's theory of social justice applies to the community, it is not communistic or radically egalitarian. He believes that wealth and other benefits are a consequence of fulfilment of one's capacity and are personal assets³⁷. Namely, individuals as members of a society could only differ based on their individual abilities and interests. Here, it is very significant that those individuals, as equal citizens, should have equal educational rights which would, otherwise, substantially determine disparity among them.

³⁴ LW, Vol. 7, p. 285.

³⁵ MW, Vol. 14, p. 210.

³⁶ LW, Vol. 2, p. 329.

³⁷ J. Welchman, *Deweys ethical thought*, Ithaca and London, Cornell University press, 1995, p. 198.

7. *Challenges of a democratic and civic-oriented society and education*

Dewey lived in the turbulent times which were full of challenges. He analysed them by offering potential guidance of society's development. He spoke out publicly in defence of democratic values and civic-oriented education freed from current politics, ideology and nationalism, i.e. in accordance with progressive human and universal values. In order to illustrate this, we are analysing a few significant and representative examples of Dewey's attitude towards events and concepts which were major challenges to democracy, civic education and national identity issues.

It is a well known fact that Dewey's early teachings were substantially influenced by Hegel's philosophy, which was eventually weakened. Besides that, he was familiar with German history, politics, philosophy and pedagogy³⁸. Discussing the engagement of the USA in The World War I, he established a relation with the historic context i.e. confrontations or diversity of American and German traditions, politics and ideology. This was wrongfully interpreted in public as affirmation of nationalism, and soon he reacted with an unequivocal clarification of his internationalist point of view. Among other things, he firmly stressed the USA's engagement in forming of The League of Nation, which he advocated and perceived as a potentially new way of resolving the conflicts between states³⁹. Thomas C. Dalton⁴⁰ is one of the analysts who believes that Dewey's interpretation of the German conflict as the one with the historical and philosophical aspect and origin, was not surprising, considering Dewey's civic, philosophical and pedagogical orientation. Namely, Dewey believed that German imperialism can be followed through its Hegelian affection towards superiority of the state and culture. He thought Hegel's belief that Germany was predestined to have historical part in the embodiment of the Absolute Spirit⁴¹, was very dangerous. Dewey's interpretation is that Germany, in the context of Hegel's ideas, (both in war and peace) through a fight for ethnic purity and superiority, was in historical and dialectical course of depriving individual liberties among its citizens. He understood such concept as a peculiar monopoly on power, authority and state power. In the civil society, he saw the essence of freedom of a democratic society, which should be the one, and not the authoritarian state, to determine the merits of cultural and educational importance. Dewey also brought them into correlation identifying the difference

³⁸ See J. Dewey, *German Philosophy and Politics*, New York, H. Holt and Co., 1915; revised edition, New York, Putnam, 1942.

³⁹ See J. Dewey's articles by 1918: *The League of Nations and the New Diplomacy; The Fourteen Points and the League of Nations; The Approach of the League of Nations; and A League of Nations and Economic Freedom*, in MW, Vol. 11.

⁴⁰ T.C. Dalton, *Becoming John Dewey (Dilemmas of a philosopher or a naturalist)*, Bloomington, Indiana University press, 2002.

⁴¹ *Ibid.*, p. 107.

between the authoritarian and democratic constitutions on one hand, and the current German and American educational concept and orientation on the other hand⁴². He considered the German education and science of that period as predominantly aimed at and subject to the power of the state and politics, excluding the cultural context. According to Dewey, that kind of concept limited the Germans of that time with regard to any sort of tolerance, and especially the attitude toward different traditions, cultures, the value systems and identities. Dewey's attitude toward Hegel's ideas, however, was complex and it requires a more detailed analysis because, among other things, Dewey's ideas differed from Hegel's in the pragmatism choosing phase, and also because of the events throughout the world at the time, especially in the USA and Europe. Aside from the influence that Hegel had on Dewey, the philosophical and pedagogic ideas of other Germans, such as Immanuel Kant, Johann Friedrich Herbart, Friedrich Froebel and others, were also important. It is important to mention that Dewey's pedagogic theory, chiefly because of its quality and novelty, was possibly the most important of the ones that were formed at the time and, as a result of it, the enthusiasm for Herbartism⁴³ waned, especially in Europe.

Accidentally or not, Dewey's book *Democracy and education*⁴⁴ was published a year before the formation of the Soviet Union, which was, according to many people, created as an attempt at the implementation of the utopian concepts of state and society. In any case, in this work Dewey explicitly rejects the utopian concepts of social progress, because he ignores the principle of the continuity of experience. Mei Wu Hoyt believes that Dewey preferred Aristotle to Plato because Plato was too utopian to be realistic about human society⁴⁵. In Dewey's mind, utopia is as a concept too ideal to be real, a dream that we cannot transform into reality even if we wanted it and no matter how much we wanted it. Therefore, what is feasible and ideal is the progressive and humanistic development of the society and growth of an individual, which is a continuous process and not a search to start anew and reject the old. Dewey does not only relativize the possibility of the validity of utopian ideas and the reality of their implementation, but primarily the quality of the outcomes and effects which are the most problematic, that is, potentially uncontrolled and unproductive, because the sole starting ideas are unfounded in the previous societal experience and are therefore potential bearers of many unnecessary and problematic and unpredictable situations. Precisely the process of solving

⁴² See J. Dewey, *American Education and Culture*, in MW, Vol. 10, pp. 196-201; *Nationalizing education*, in MW, Vol. 10, pp. 202-210; *The Principle of Nationality*, in MW, Vol. 10, pp. 285-291; and *On Understanding the Mind of Germany*, in MW, Vol. 10, pp. 216-233.

⁴³ E. Protner, *Herbartianism and its Educational Consequences in the Period of the Austro-Hungarian Monarchy*, Frankfurt am Main, Peter Lang, 2014, p. 7.

⁴⁴ Dewey, *Democracy and education*, cit.

⁴⁵ M.W. Hoyt, *John Dewey's legacy to China and the problems in Chinese society*, «Transnational Curriculum Inquiry», vol. 3, n. 1, 2006, p. 16.

the current problematic situations and also finding what is common to all of us, not what sets us apart, as well as a high level of tolerance is the road which the society and education should follow. Thus, the continuity of experience and argumentative research are necessary for the development of the society and the solving of problematic situations. Instrumentalist views of the relationship between an individual and the society implies individual and cooperative problem solving; Dewey sees utopian views as a paradigm or a set of principles which limit the critical self inspection, that is, everything that is considered or seems obvious, excluding the potentially new and unpredicted problematic situations. The lack of self-criticism considerably delimits the utopian concept. According to Dewey, it is exactly in the ongoing reconsideration, experimenting and 'reasonable suspicion' that the progress of society is carried out to a large extent. The definitions of instrumentalism and utopianism are diametrically opposed, and the role of doubt is central in their distinction. Utopians encourage scepticism in thinking about something new or different, but they forbid it in a paradigm within utopia. According to Dewey, not everything can be put in doubt at once, but everything can be submitted to it⁴⁶. Therefore, participation in research requires our priority examination and a constructive approach without prejudice.

Dewey's 1924 visit to Turkey was principally a pedagogical mission, but even as such it was burdened by both ideological-political and religious-nationalistic challenges, problems and other peculiarities. In fact, many difficulties stood in the way to the reform, i.e. to creating the newly-formed, modern Ataturk's Turkey (Mustafa Kemal Ataturk), and in order to overcome and solve many of them, Dewey was also invited. Dewey's most important suggestions concerned the reform in the area of education, in particular the education of teachers. Dewey's propositions on teacher training, contrary to the idea of actual and new constitutional attitude in Turkey, gave great advantage to intellectual and pedagogic knowledge instead of political and ideological orientations⁴⁷. In fact, in the age of Ataturk, Turkey's view on the function of teachers was that they are supposed to convey the state's ideology to the masses, and therefore teach the young generations the identity, civilian, secular and overall Western ideas of the new order. This was necessary for the survival and development of the newly established social and political conception. The realization of such a republican ideal demanded early, clear and direct instruction of the youth on the new ideology, i.e. the new value system and culture. To many it seemed more realistic than Dewey's suggestions to go 'bottom up', meaning through the initial and gradual creation of the democratic school environment, where the

⁴⁶ J.A. Poop, *Naturalizing philosophy of education (John Dewey in postanalytic period)*, Southern Illinois, University press, 1998, p. 110.

⁴⁷ A. Yilmaz, *The preparation of elementary teachers during the early years of the Turkish Republic*, Thesis in Education Dept., Lehigh University, advisor Robert L. Leight A.Y. 1994.

individuals think freely and participate, which is expected to have the society transformed into a democratic and civil state. In a reformed, newly constituted state that strived towards survival, at least when it comes to the development of democracy and civil society, as Dewey thought and understood it, his suggestions seemed too general to many. We could add that in this particular case they were also quite unrealistic and slow for the needs of Turkey. Still, his work was positive and left a significant mark on the development of society, state and civil orientation of education in Turkey.

Beside Dewey's stay, work and the impact he left in Turkey, it is important to emphasize that he made many international visits, among which the most significant are those to China, Japan and USSR⁴⁸. His very long and productive life in the scientific field is characterised by numerous journeys abroad, during which he enriched his experiences and presented his ideas. He also cultivated the international and civil approach in his private life through two marriages, six children from those marriages and three children he adopted. In connection to this, it is important to point out several tragic, as well as illustrative, significant and multiply influential pieces of information. Dewey's son Morris, from his first marriage with Harriet Alice Chipman (1859-1927) died of diphtheria in 1896 in Milano, Italy, on a family journey across Europe.

Gordon, the fourth child from his first marriage, born the same year (1896), died in 1904 on a family vacation in Ireland (his life lasted as long as the Laboratory School in Chicago 1896-1904 founded and ran by Dewey and his wife). That same year, the Dewey family adopted a six-year-old boy from Milano while travelling across Europe, who managed to fit in quickly and became very much loved. Some interpreters of Dewey's life and work believe that the deaths of his two sons had left great scars on his scientific focus on the present, not even primarily on the future, and definitely not on the facts, memories, pleasures or misfortunes from the past⁴⁹. Dewey got married for the second time in 1946, to Roberta Grant. They were worried about the reports on the problems of many children in the Post-war Europe, and soon after they adopted two siblings from Belgium (John and Adrienne), who had become orphaned during the war. Dewey had a great relationship with them for the rest of his life. His personal life, humanity and active participation are the best indicators that Dewey lived his ideas of civil and democratic society and education.

⁴⁸ See V. Zorić, *Utjecaj Johna Deweyja na reforme obrazovanja u Japanu, Kini i Sovjetskom Savezu* [John Dewey's Impact on Education Reforms in Japan, China and The Soviet Union], «Zivot i skola», n. 26, 2011, pp. 25-38 (in Croatian).

⁴⁹ J.J. McDermott (ed.), *The philosophy of John Dewey*, Chicago and London, The University of Chicago press, 1973, str. xix.

Concluding remarks

Dewey's critical attitude towards individualism of classical liberal tradition is very important for the analysis of the origin and premises of Dewey's concept of civic education. Namely, the achievement of individuality is a necessary condition for the exercise of freedom of individuality, so much that they seem identical, synonymous or necessarily mutually conditioned. In addition, social activity is required for each action and influence in the overall development of democracy for all citizens in a society. Democracy and democratic quality should be life, educational, ethical and political principles and ideals of civil society and education. Dewey saw the society as a harmonious democratic organism, whose citizens get connected by common goals, interests and ideals within an environment of freedom, openness, tolerance, empathy, criticism, self-criticism, cooperation, activity and gender equality. These are specific methods or principles that should adorn democracy, civil society and the educational process. Dewey's vision of a democratic ideal of education consists of participation and research, which is essential to provide a real freedom to every individual as equal citizen and a practical understanding of his/her specific interests and needs. This is opposed to the authoritarian school that celebrates passivity, inequality and transmission. Still, Dewey's argument that the experimental character of democracy provides the desired outcomes would be wrong to interpret in a simplified instrumentalist way. He says not only that democracy provides a clearer insight into the social problems and how they should be treated, but also provides suggestions that indicate that individuality can be appropriately expressed if one participates in democratic activities, having in mind that social research is a part of the individual good. It is a requirement for an individual and his/her individuality in a specific ethical sense in which Dewey developed the theory of his criticism of classical liberalism. In doing so, it would be considered incomplete to consider Dewey's political philosophy as a combination of idealistic and neo-liberal vision and his pragmatic or experimentalist conception of research. However, such a view, although there were many other important influences throughout his intellectual life, greatly covers the characteristics of Dewey's political considerations and its links and influence on pragmatist conception of education.

Although Dewey's pragmatism is focused primarily on solving practical problems and increasing human power, its function is not, as it is usually understood, narrow, selfish, separate or individual by nature, but has a social character. Bertrand Russell believes that Dewey's world is the world in which imagination is drawn to human beings, and his philosophy is the philosophy of power, although not of individual power, but a power of community⁵⁰.

⁵⁰ B. Rasel, *Istorija zapadne filozofije* [History of western Philosophy], Beograd, Narodna knjiga, 1998, p. 735 (in Serbian).

Meanwhile, this is not a tendency of the individual to get ‘dissolved’ in its social functions. The benefit and the wellbeing of the community and individuals are mutually connected, and thereby the concept of beneficial is in pragmatism used in different ways: sometimes in terms of the individual, but more often in terms of general social benefit or good⁵¹. It is this social dimension that has often been ignored or misunderstood in the context of Dewey’s socio-political, philosophical and pedagogical thought and conceptions of education. It is fundamental for understanding his educational conception aimed at civil society and its citizens, which is not directed towards the development of the community’s power through domination, lack of questioning, enforcement and conflict.

It seems that connecting Dewey to Hegel’s ideas, German educational, social and state policy of imperialism and nationalism had a significant instrumental role and usage. This was especially the case when striving for pragmatism, Dewey got more apart from his prior neo-Hegelian, idealistic pedigree. However, such critique is not in accordance with Dewey’s careful approach to examination of reality or philosophy, policy and pedagogy. First of all, it is in accordance with and justified in terms of criticism of nationalism, fascism, totalitarianism or intolerance towards anything unworthy, that is, if we want a civil society and education for all citizens in the spirit of progress and coexistence. Dewey sees society and education as civic, democratic, ‘relieved of’ nationalistic, everlasting and extreme methods and ideals. His pragmatism offers middle way or style of life without boundaries of relativism, universalism and ethnocentrism. Mutual or common learning entails dialogue between different people in order to improve relationships and hopes for transformations of common habits⁵². Within his critique of radical, utopian and ideological conceptions of society and education, Dewey advocated for research and work towards a democratic society, which can benefit all of its citizens and the entire community with democratic education, dialogue, constructive criticism, tolerance and respect for the rights, science, culture, diversity and freedom. In Dewey’s opinion, the role of reconstruction and reform of education in the development of civil society and democracy is of fundamental importance, and their influence is viewed as reciprocal and their development as gradual. Although Dewey’s attitudes about the reconstruction of society and the role of education in it were perhaps too optimistic, his ideas were very important and inspiring for many societies and pedagogical concepts. However, it turned out that Dewey’s ideas, although inspiring, were to a significant degree too general and in some specific cases unrealistic. In fact, it seems that Dewey did not offer sufficient concrete, precise

⁵¹ V. Korac, B. Pavlovic, *Istorija filozofije* [History of Philosophy], Beograd, ZUNS, 2002, p. 223 (in Serbian).

⁵² N. Saito, *Education for Global Understanding: Learning From Dewey’s Visit to Japan*, New York, «Columbia University – Teachers College Record», vol. 105, n. 9, 2003, pp. 1768.

and operative proposals for changes that would make the management more sensitive to the interests of the public and suggestions on the best methods of political (self-) management.

John Dewey tried to use his socio-political and philosophical ideas in order to establish a pragmatic conception of education with solid and wide premises and give it a practical role in the real life of an individual and a society. For him, there is no democratic society or a free individual without a democratic and civic-mindedly conceived education. He created an educational philosophy, specially designed to serve the goals of civic harmony and individual development, thinking that only a society that contains both of these can be considered a democratic society⁵³. In that way, democracy is more than a form of society. It allows equal participation of all citizens in education and in the life of community. Some of the basic characteristics of Dewey's political philosophy such as: anti-elitism, unconventional perception of democracy as a form of connections, typical not only of political institutions but of wide range of variations of social fields and relationships, holism, democratic participation as an aspect of individual freedom etc. determined his civic orientation in the field of pedagogy and education. He represented his democratic-civil way of perception and conception of pedagogy and life in one of his most famous books *Democracy and Education* that could have been easily named *Democracy as Education*⁵⁴. In it he integrated his philosophy of democracy and the theory of education to such an extent that he saw education as a basis in searching for democratic realization of an individual and a civil society. Therefore, we can say that the role of civic-oriented upbringing in the development of an individual, society, state, democracy and education in Dewey's thought is irreplaceable, fundamental and multidirectional. It could be said that its fulfilment is a goal many are striving to achieve, partially succeeding, questioning it and experimenting in the manner of Dewey's pragmatism. Dewey did not claim that he could offer us the recipes which, if stuck to, would guarantee success. Instead, he saw the development of the society, its citizens and their education as a gradual process, unpredictable as life itself, through which we can be guided by the experimental and humane treatment of reality and life.

⁵³ B. Blanche, *Changing concepts of equal educational opportunity: A comparison of the views of Thomas Jefferson, Horace Man and John Dewey*, «American Educational History Journal», vol. 32, n. 2, 2005, p. 169.

⁵⁴ J. Welchman, *Deweys ethical thought*, Ithaca and London, Cornell University press, 1995, p. 191.

Nation building in the school prize giving ceremonies of the first decades after Italian Unification. A case study of post-unification Bologna

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ABSTRACT: This contribution aims to investigate the role of school prize giving ceremonies in order to understand the contents and public methods adopted by the ruling classes in the construction of national sentiment after Unification. The approach of the case study focusing on post-unification Bologna allows us to link the elements of the top-down plans of the ruling classes with the general teaching choices of the time (textbooks, curricula, teaching aids, etc.) and specific bottom-up elements, through the study of the exams set for the awarding of the prizes.

EET/TEE KEYWORDS: Nation building; Primary School; Prize giving; History of Education; Italy; XIX Century.

Introduction

Italian historiography has been investigating the plans of the ruling classes for building national identity for some time, renewing its interest due to the celebration of the 150th anniversary of Italian Unification¹. In the past few

¹ S. Lanaro, *Nazione e lavoro. Saggio sulla cultura borghese in Italia 1870-1925*, Venezia, Marsilio, 1980; B. Tobia, *Una patria per gli italiani. Spazi, itinerari, monumenti dell'Italia unita (1870-1900)*, Bari-Roma, Laterza, 1991; U. Levra, *Fare gli italiani. Memoria e celebrazione del Risorgimento*, Torino, Istituto per la Storia del Risorgimento italiano, 1992; S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea. 1. La nascita dello Stato nazionale*, Bologna, Il Mulino, 1993; S. Bertelli (ed.), *La chioma della vittoria. Scritti sull'identità*

decades, educational historiography has particularly focused on the role of schools in building the nation, and on the educational mediators of this phenomenon aiming to build new citizenship, identifying the important role of text books in this research, due to their ability to convey values and behavioural models and their diffusion in the classrooms². In addition to books, some subjects have been analysed which, due to their specific nature, contributed greatly to the diffusion of a common *ethos*, a theory of national and civil history, particularly the history taught in the curricula and text books developed specifically for schools³. Alongside these sources, other 'minor' sources have been analysed,

degli italiani dall'Unità alla seconda Repubblica, Firenze, Ponte delle Grazie, 1997; M. Isnenghi (ed.), *I luoghi della memoria. Simboli e miti dell'Italia unita*, Bari-Roma, Laterza, 1998; Porciani, *La festa della nazione. Rappresentazione dello Stato e spazi sociali nell'Italia unita*, Bologna, Il Mulino, 1998; F. Tarozzi, G. Vecchio (edd.), *Gli Italiani e il Tricolore. Patriottismo, identità nazionale e fratture sociali lungo due secoli di storia*, Bologna, Il Mulino, 1999; F. Traniello, *Nazione e storia nelle proposte educative degli ambienti laici di fine Ottocento*, in L. Pazzaglia (edd.), *Cattolici, educazione e trasformazioni socio-culturali in Italia tra Otto e Novecento*, Brescia, La Scuola, 1999, pp. 61-91; A. Quondam, G. Rizzo (edd.), *L'identità nazionale. Miti e paradigmi storiografici ottocenteschi*, Roma, Bulzoni, 2005; E. Gentile, *La grande Italia. Il mito della nazione nel XX secolo*, Roma-Bari, GLF Laterza, 2006; A.M. Banti, *Sublime madre nostra. La nazione italiana dal Risorgimento al fascismo*, Roma-Bari, Laterza, 2011.

² G. Chiosso, *L'educazione nazionale da Giolitti al primo dopoguerra*, Brescia, La Scuola, 1983; Id., *Nazionalità ed educazione degli italiani nel secondo Ottocento*, «Pedagogia e vita», n. 4, 1987, pp. 421-440; G. Chiosso, *L'educazione tra solidarietà nazionale e nuova cittadinanza: profilo storico*, in *L'educazione tra solidarietà nazionale e nuova cittadinanza*, Brescia, La Scuola, 1993, pp. 7-56; M.C. Morandini, *Scuola e nazione. Maestri e istruzione popolare nella costruzione dello Stato unitario (1848-1861)*, Milano, Vita & Pensiero, 2003; G. Talamo, *Scuola e nazione in Italia nei primi decenni post-unitari*, in P.L. Ballini, G. Pécout (edd.), *Scuola e nazione in Italia e in Francia nell'Ottocento. Modelli, pratiche, eredità. Nuovi percorsi di ricerca comparata*, Venezia, Istituto Veneto di Scienze, Lettere ed Arti, 2007, pp. 17-39; 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. 7, n. 2, 2012, pp. 79-96; F. Cambi, G. Trebisacce (edd.), *I 150 anni dell'Italia unita. Per un bilancio pedagogico*, Pisa, ETS, 2012; M. Bacigalupi, P. Fossati, *Da plebe a popolo. L'educazione popolare e i libri di scuola dall'Unità d'Italia alla Repubblica*, Firenze, La Nuova Italia, 1986; G. Chiosso (ed.), *TESEO Tipografi e editori Scolastico-Educativi dell'Ottocento*, Milano, Editrice Bibliografica, 2003; Id., *TESEO '900 Editori Scolastico-Educativi del primo Novecento*, Milano, Editrice Bibliografica, 2008; G. Chiosso, *Alfabeti d'Italia. La lotta contro l'ignoranza nell'Italia unita*, Torino, SEI, 2011; R. Sani, *Sub specie educationis. Studi e ricerche su istruzione, istituzioni scolastiche e processi culturali e formativi nell'Italia contemporanea*, Macerata, eum, 2011; M. D'Ascenzo, *Col libro in mano. Maestri, editoria e vita scolastica tra Otto e Novecento*, Torino, SEI, 2013.

³ A. Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale. L'insegnamento della storia nelle scuole italiane dell'Ottocento*, Milano, Vita & Pensiero, 2004; Id., *Metamorfosi della cittadinanza. Studi e ricerche su insegnamento della storia, educazione civile e identità nazionale in Italia tra Otto e Novecento*, Macerata, eum, 2009; P. Bianchini (ed.), *L'origine delle materie. Discipline, programmi e manuali scolastici in Italia*, Torino, SEI, 2012; G. Bandini (ed.), *Manuali, sussidi e didattica della geografia. Una prospettiva storica*, Firenze, Firenze University Press, 2012; on school subjects, I refer to the reasoned collection of works on this matter by S. Polenghi, *School subjects didactics in the history of education. Sources and methodology. Italian studies*, «History of Education & Children's Literature», vol. 9, n. 1, 2014, pp. 635-648.

including exercise books and some teaching aids functional to the subjects taught, also in terms of their role as *media* of common values, knowledge and behavioural models⁴. In this work, I would like to focus on a source which until now has not been unexplored in the history of Italian education: school prize giving ceremonies. These were important collective events, rooted in pedagogic and educational practices prior to Unification in the modern era, and used widely after Unification, as a pedagogic tool linked to national education. In fact, the prize giving ceremonies were attended by the winning pupils, their families, the teaching staff and key authorities, who read a text prepared for the occasion: a skilfully drafted text, aiming to educate the public and, given the circumstances, promote a sense of belonging to a civil and educational community, an idea of school and citizenship, with values to be shared, able to change over time while maintaining the essential formula of collective rituals: exemplary dates and places, specific positioning of the authorities and spectators (parents, pupils and teachers), any musical background, exchange of gifts (in this case, the various forms of prizes over time) and the official speeches given by the relative authority. This was a complex pedagogic apparatus, a kind of carefully orchestrated ‘theatrical’ representation, a show put on by the actors which can be read in both historical-anthropological and historical-educational terms⁵. The purpose of this contribution is to investigate the school prize giving ceremonies held in Italy after Unification, guaranteed and permitted by the legislation of the time almost as a continuation of previous school practices deemed to be important in pedagogic terms⁶. In particular I will focus on the official speeches given by the authorities over time, analysing the geographical area of the city of Bologna, considered as a particularly useful microcosm for investigating this phenomenon on a broader scale, between Italian Unification and Fascism. Finally, within the limits of the printed documentation and archive materials gathered, I will attempt to identify the forms and methods of these prize givings and the contents of the speeches delivered, in relation to the

⁴ J. Meda, D. Montino, R. Sani (edd.), *School exercise books. A complex source for history of the approach to schooling and education in the 19th and 20th centuries*, 2 vols., Firenze, Edizioni Polistampa, 2010; M. D’Ascenzo, R. Vignoli, *Scuola, didattica e musei tra Otto e Novecento. Il Museo didattico ‘Luigi Bombicci’ di Bologna*, Bologna, Clueb, 2008; M. Ferrari, M. Morandi, E. Platé, *Lezioni di cose, lezioni di immagini. Studi di caso e percorsi di riflessione sulla scuola italiana tra XIX e XXI secolo*, Parma, Edizioni Junior, 2011.

⁵ E. Nardi, *La festa della premiazione*, «Cadmo», vol. I, n. 1, 1993, pp. 55-56; A. Gramigna, A. Ravaglia (edd.), *Etnografia della formazione*, Roma, Anicia, 2008; A. Escolano Benito, *La escuela como cultura. Experiencia, memoria, arqueología* (in print).

⁶ «After announcing the names of the pupils passing the annual exam, in line with the exam results, the local administrations will award books and certificates of merit to pupils who have excelled the areas of study, diligence and good manners. These public ceremonies with the intervention of the local authorities, shall be organised by the municipal superintendency and chaired by the Mayor, unless an official from the governmental educational authority attends» in R.D. no. 4336 dated 15 September 1860, the Regulation for Primary Education, art. 53.

project of *Nation building* implemented by the ruling classes after Unification, also through schools.

1. *Why prizes?*

The expulsion of the Austrians from Bologna on 12 June 1859 caused an authentic political upheaval in the city, with a split between the Catholic wing which remained true to the Pope and the moderate liberal ruling class which, together with the progressist-democratic class had driven the process of Unification. In the early years, until 1869, the moderate liberals linked mainly to Marco Minghetti governed the city with some positions in opposition to the centralised Savoy government. In educational terms, they managed the institutional and organisational transition from the old to the new programme, establishing boys' and girls' schools, the municipal *ginnasio* and *liceo* high schools and the technical schools, not without some problems, but also with the enthusiasm of a new generation leading the peripheral development of the new school system⁷. A witness and key player of this political change was Cesare Cavara, scholar and ex-teacher of the pre-unification Pious Schools and an important figure in the early phases of building the Bologna education system in the first decade after Unification, in his role as *Ispettore regio*, Royal Inspector of the Primary Schools of Bologna⁸. It was indeed Cavara who collected and oversaw the publication of the speeches given by various authorities in the first official school prize giving ceremony in August 1860. This was a special ceremony, as on one hand it marked the need for continuity in the local and national history, and on the other hand a clear break⁹. He underlined the new political change underway starting from

faith in the strong Principle that protects us [...] and our will to support its aims fully [...] as it is unfortunately true that while in despotic governments there lies hatred for a constant system of all forms of education, these are especially denied to the poor classes

⁷ F. Boichicchio, *Democratizzazione della scuola italiana. Momenti e problemi*, Bologna, Clueb, 1995, particularly pp. 203-222 and M. D'Ascenzo, *La scuola elementare in età liberale. Il caso Bologna*, Bologna, Clueb, 1997.

⁸ On Cesare Cavara cf. *Dizionario Biografico dell'Educazione (DBE)*, Milano, Editrice Bibliografica, 2013, vol. I, p. 314 and M. D'Ascenzo, *La scuola elementare in età liberale. Il caso Bologna*, cit., pp. 60 and following.

⁹ «in each year there will be an official prize giving has has been done until now. The printed sheet will mention the deserving young ones, and the Schools, and the Teachers under whom they studied» in Carlo per Divina Misericordia del Titolo di S. Bernardo alle terme della S.R. C. Prete Cardinale Oppizzoni Arcivescovo di Bologna, *Regolamento sulle Scuole Pie*, 25 novembre 1837, Titolo V Della Premiazione, art. 1.

of the population, and so that they may always blindly obey, it is necessary that they never learn facts that could make them aware of their civil rights¹⁰.

The criticism of ‘despotic governments’ was one of the common features of the prize giving ceremony speeches, also heavily disputed by the Intendant Carlo Zanolini who, while recalling the establishment of the Pious Schools as a religious initiative for educating the population, underlined the ‘fashionable ambition’ that in recent times had led the monks away from their own mission against ignorance:

and now especially to you I speak, children of the people. This charitable, admirable institution of the Pious Schools, as your very name says, was created when everyone, and particularly the Priests, wished in their holy and praiseworthy work to educate the masses, before fashionable ambition and the partial spirit deviated the religious orders from divine precepts of the Gospel to consider it healthy to keep the common people in ignorance and brutishness¹¹;

and, so doing, implicitly suggesting the interpretation of a menacing, conservative world to be fought in the new political era. In what was once the Pious School, now stood the effigy of the new Savoy king, and Carlo Zanolini went on to sing the praises of the ‘Gentleman King’ (Victor Emmanuel II):

now all cry with me, Long Live the King, by providential counsel destined to restore new life to the new land of Italy, fecund with military feats and the virtue of the people. Long Live the King of redeemed and regenerated Italy!¹²

using the imagery of ‘providence’, ‘redemption’ and ‘regeneration’, taken from religion yet now understood in a civil sense, i.e. that *civil religion* used as a conceptual and discursive tool to make Italians. The Savoy and the Homeland were also the ‘fil rouge’ of the speech given by the Intendant Carlo Mayr, who reminded the students that their country needed their commitment and help, with a highly persuasive, non-authoritarian tone:

the homeland, oh young people, puts its faith in you, who represent the future, which mostly depends on you. So double your efforts and your hard work, act fondly and kindly towards the loving and intelligent care of your headmasters and teachers, and make every effort to

¹⁰ *Solenne distribuzione de' premi agli alunni delle Scuole Pie di Bologna il 27 Agosto 1860*, Bologna, Regia Tipografia, 1861, p. 3.

¹¹ *Solenne distribuzione de' premi agli alunni delle Scuole Pie di Bologna il 27 Agosto 1860*, cit. p. 2. On Carlo Zanolini cf. *Commemorazione del compianto prof. cav. Carlo Zanolini già segretario della Società agraria di Bologna letta alla società suddetta dal prof. Gino Cugini*, Bologna, Tip. di G. Cenerelli, 1891.

¹² *Solenne distribuzione de' premi agli alunni delle Scuole Pie di Bologna il 27 Agosto 1860*, cit. p. 6.

obtain the best education you can, as your studies now are the basis of every greater and most noble lesson [...] and thus, our Italy made great and powerful, will return to the peaks of world civilisation, which as it is there that its origins lie, shall owe it new progress, and not fleeting splendour¹³.

A new vision of national and local history, the exaltation of the Savoy monarchy with its symbols and core values, such as that of the Italian supremacy, were joined to a partly old and partly new role assigned to education, conveyed through the rhetoric of the speeches accompanying the distribution of prizes and medals. The rewarded students were praised for their good conduct and the knowledge acquired, the slow ones were incited to improve, enticed by the moral prize of the praise of their teachers and relatives, with persuasive pedagogic tones:

and if you do not succeed in obtaining the material prize of a medal or a book, which cannot be granted to all, a moral prize, and nonetheless worthy, will be granted by the affections of your teachers, who will assess the efforts made, the results achieved, and how much more fatigue it will have cost you; you will earn the satisfaction of your relatives, the esteem of your companions and the pleasure you will yourselves feel for believing that you have done your duty¹⁴.

In the speeches of 1860 however, another interesting and perhaps little highlighted aspect appeared in the publications on *Nation building*; these generally refer to general historiographical studies rather than specific cases, and therefore conserve the risk of generalisations that do not fully comply with the historical reality of the facts, as effectively happened in the various local, municipal, provincial and regional micro-histories, so often regarded from the top-down viewpoint of the ruling classes and not rather on the 'actual reality'. A strong emphasis on the role played by instruction – rather than generic education – as a driving force for personal and social growth emerges from this case study. These new times, the new political freedom obtained guaranteed by the new, unified Savoy reign focus on the infinite possibilities for change in the civil and social condition of the individual, through education and schooling:

we are no longer, for the mercy of God, in those times in which the lack of an honourable career offered young people the pretext to wallow in laziness and bad manners. Now that our country is free, how many new opportunities there are for employment, how many new jobs are offered to tradesmen and, as we will see better, with the progress made in industry and trade the single, independent Italian nation will be able to trust and confide in its own

¹³ *Ibid.*, p. 7.

¹⁴ *Ibid.*, p. 4.

strengths, and may the events of the war be set aside for study and the arts of peace. And in many public and private businesses, the best places, the most profitable jobs will be for the most educated, righteous and decent. So learn and be educated, if you wish to obtain a nice, lucrative social position¹⁵;

also suggesting new professions made available to the lower classes through education, certainly bourgeois professions but highlighted as attractive models of identification, with such exquisite pedagogic tact:

and if fate should call you to the army, you can hope to obtain the highest ranks, as you will not be asked if you are of lowly or noble stock but rather if you are brave, educated and of good conduct. And if you remain in civilian life, you may be a national guard, appointed to maintain the public order, and as electors you will appoint your own magistrates and representatives in the national parliament; and thus indirectly you will cooperate in the administration and management of public affairs. And the most educated among you may be called upon directly to perform one of the highest and most serious of offices that may be assigned to a man, that of judging your fellow citizens, when called upon to be part of a jury¹⁶.

These new possibilities, indeed defined by the term ‘rights’ acquired in the new political era and in the Statute, explicitly referred to by Zanolini when talking of the equality of all citizens before the law, were however linked to the efforts made in learning and studies, as well as the development of good behaviour, which while certainly traditional were in any case very much in line with the new political era, reliability, cleanliness, moral conduct and the abandonment of dialects in favour of the Italian language:

leave your coarse and false manners to one side, pay attention to the cleanliness of your person and your clothing, act with decorum, get used to speaking our lovely national language with ease, make progress in your studies and who then will say that you are not equal to any of your other companions who may be blessed with more fortune than yourselves? And who knows whether you may even exceed them? As you often are stronger in body than other citizens in better conditions, show too that you are also quicker of mind, with a more energetic and resolved character, and what excellent fruits you may harvest from such precious qualities if they are moderated by education and cultivated by instruction! And indeed how many eminent men have stood out from the ranks of the common people? Even today you will hear the Hero of Varese or Palermo boast of their humble origins¹⁷.

Taking inspiration from a generic study of the ‘holy Religion’ to capture the divine precept and above all from the new teaching – for the first time recalled by Zanolini, and perhaps more hoped for than already active – meaning the duties of men and citizens «if moreover you will seek to profit from that special

¹⁵ *Ibid.*, p. 2.

¹⁶ *Ibid.*

¹⁷ *Ibid.*, p. 6.

teaching which by such provident laws you will be given from now on, on the duties of men and citizens»¹⁸.

Along with the Savoys, the homeland, education as a tool for social ascent and future active citizenship came the task of bringing glory to the city, supporting the importance of a sense of belonging to the local community, the city of Bologna remembered as the mother of studies:

and so that illustrious facts and eminent examples may drive your souls to virtue, remember that Bologna was called the mother of studies, and many illustrious names were made in all kinds of arts and sciences, second to no other city in Italy. In our times still faced with many political events and a multitude of obstacles, Bologna, whatever denigrators may say, counts many distinguished names, and will count even more in the future, when the peace obtained at the price of Italian blood will pave the way for profound studies¹⁹.

And thus the national-local, central-peripheral polarity, which constituted one of the characterising elements of the unified state, emerged right from the start in a school prize giving ceremony, the epitome of a manifestation of political and cultural power with its consolidated rituals, its rhetoric and its symbols: even when changing some of the institutional figures and founding values – no longer the cardinal but the new civil authorities, no longer the focus on religion but on the homeland and the Savoys – the continuity of the forms of public ritual and the types of prizes remained, like the noble offices of ‘emperor’, ‘archduke’, ‘first and second class dukes’, accompanied by prizes of medals, crosses or books, with an interesting critical note, perhaps written by Cesare Cavara himself, curator of the brochure, concerning the pedagogic risks of school prize givings:

we should remember that not all those remembered in this list received medals, crosses or books; the diligent were remembered only with words of praise. Thus the list of prize winners out of the 1,200 pupils of the Pious Schools will be greatly reduced. We must reduce the number of prizes as far as possible in order to increase their importance. We must also modify the titles and hierarchy of the prize winners, also in this case imitating the useful reforms of other countries. It is better to truthfully call these young people by *first prize*, *second prize* etc. than give them titles, which in their application become an authentic parody, to put an end to the vanity which lies in the minds of children²⁰.

The following year, after the proclamation of the Kingdom, the curator of the prize giving ceremony brochure again underlined the centrality of education as a further element of national cohesion and a free instrument of power, to which Bologna assisted under the aegis of the ‘Gentleman King’:

¹⁸ *Ibid.*

¹⁹ *Ibid.*, p. 8, words of Domenico Rossi, Headmaster of the Scuole Pie.

²⁰ *Ibid.*, p. 11. From the next school year the noble titles had disappeared.

the education of a nation is the basis of its independence, for the fact that it alone arouses and strengthens the true sentiment of national dignity in the soul, and the Monarch who coming to the throne performs his first tasks to propagate this generator of civilisation makes a sure pledge of free and abundant government, so that the people governed by that King can be said to be happy. Learned Bologna that had a distinguished place in history, that has always kept the holy flame of freedom alight in its altar, to break the heavy and rusting chains of slavery, runs to the embrace of the free sisters under the paternal sceptre of the Gentleman King²¹,

playing rhetorically on the opposition between the previous «neglect of the clerical government»²² and the «diligence of the governmental and municipal school authorities, supported by valorous and zealous citizens»²³ in describing a new political scenario: «now that a new era of freedom and progress has reached all, they call out hungry to feed the intellect, which can alone raise them up to the dignity of men and citizens, and at the same time improve their social and economic condition»²⁴.

In the historical premises of the Pious School, restored and decorated by the marble effigy of the new king, paid for by donations from teachers and pupils, an inscription composed by the royal inspector Cavara in honour of the king was also hung («To Victor Emmanuel, King of Italy, who claimed freedom and education as primary foundations of his reign, the teachers and pupils of the day and night technical and primary schools of the Municipality of Bologna offer this sign of their appreciation, year MDCCCLXI») ²⁵ and inaugurated by Sebastiano Zavaglia, teacher at the municipal technical school, who emblematically recalled the three purposes of education: «moral, national and scientific»²⁶. Exaltation of classical studies, praise of the new provisions introducing Greek also at *ginnasio* level, the nation understood as a common identity of language, land and glorious history: these were the recurrent themes in the speeches made by the authorities, puffed up with rhetoric and fine style, perhaps more written than actually pronounced, and also known for their long-windedness. Between the applause and the singing of the hymn – composed by Cesare Cavara, set to music by the singing teacher Federico Parisini and played by the band – came the 1861 prize giving of the primary schools, embellished by a display of drawings and handwriting samplers. Cavara once again exalted the homeland, the ‘Gentleman King’ – compared to the biblical God of the Old Testament – and the whole of Piedmont which had introduced new subjects to the primary school curriculum, including national history and geography,

²¹ *Solenne distribuzione de' premi agli alunni delle scuole secondarie ginnasiali e tecniche e delle elementari, diurne e serali del Municipio di Bologna 1 Anno 1861*, Bologna, Regia Tipografia, s.a., p. 3.

²² *Ibid.*, p. 4.

²³ *Ibid.*

²⁴ *Ibid.*

²⁵ *Ibid.*, p. 8.

²⁶ *Ibid.*

required to build the national identity and previously not taught in the Pious Schools of Bologna, obviously for political reasons. Once again Cavara touched the 'heartstrings' of that small homeland Bologna, remembering the city's ancient glory, the happy and hospitable nature of its inhabitants, the contributions of the great Bolognese scientists of the past, and the problems of a city that once suffered from delinquency, poorly managed by the authorities:

it is not with life sentences or the axe that the scourge of a people is cured: it is not by punishing the crime that the bad seed is eradicated, it is by preventing the crime. It is with the institutions that procure honoured bread, it is with education, arousing the human sense of duty and dignity (dignity that comes particularly from national greatness) that States are moralised. And which were we? The soul shies away from thinking of it. While social enterprise was old elsewhere, here we could not even talk of it, knowing well that we would be opposed²⁷.

In the 1863 school prize giving, alongside the speeches of Carlo Pepoli for the night schools, P. Cuttica for the municipal ginnasio, Raffaele Ridolfi who exalted Dante as a model citizen and scholar and Carlo Zanolini for the technical schools, appeared two reports by Gaetano Atti, headmaster of the municipal primary schools: one for the boys, and one for the girls, who received prizes for the first time. Frequently citing the works *Origini italiche* and *Prolegomeni dell'Italica storia* by Angelo Mazzoldi, who as early as the 1840s had called for Italian unity²⁸, Gaetano Atti recalled the municipal authorities' commitment to the primary school, the constant increase in the number of pupils and the improvement in their general moral education, underlining the importance of national education as a deterrent against delinquency, in this regard also citing Carlo Boncompagni²⁹. To the pupils of the girls' school Gaetano Atti recalled illustrious women born in Bologna, i.e. «92 women scientists, 145 scholars of ancient languages, 172 prose writers, 324 poets without counting the experts of the fine arts»³⁰, extolled as models. However, «these scientific and literary gems

²⁷ *Ibid.*, p. 27.

²⁸ *Delle origini italiche e della diffusione dell'incivilimento italiano all'Egitto, alla Fenicia, alla Grecia e a tutte le nazioni asiatiche poste sul Mediterraneo*, 1840; *Prolegomeni alla storia d'Italia in continuazione delle origini italiche. Lezioni dette nella R. Università di Torino dal 16 maggio al 30 giugno 1860*, Milano, Antica casa tipografico-libreria Giovanni Silvestri ora Lorenzo Recchioni e C., 1862. On Angelo Mazzoldi, historian, scholar, patriot and later member of parliament of unified Italy, cf. *Dizionario Biografico degli Italiani*, Roma, Istituto dell'Enciclopedia italiana, 2009, Vol. 72, pp. 664-665.

²⁹ *Relazione del professore Gaetano Atti Direttore delle Scuole primarie Comunali per la premiazione delle scuole maschili diurne al 6 dicembre 1863*, in *Discorsi e relazioni per la solenne premiazione del 1863 nelle scuole comunali di Bologna*, Bologna, Tipografia Cenerelli all'Ancora, 1864, pp. 25-28. On Gaetano Atti cf. *Dizionario Biografico dell'Educazione (DBE)*, cit., Vol. I, p. 73 and for his works, M. D'Ascenzo, *La scuola elementare in età liberale. Il caso Bologna (1859-1911)*, cit. and Ead., *Col libro in mano*, cit.

³⁰ *Relazione del professore Gaetano Atti direttore delle scuole primarie comunali di Bologna per la premiazione delle scuole femminili agli 8 dicembre 1863*, in *Discorsi e relazioni per la*

shone only between the domestic walls, their rays fell little further; they did not show themselves off to the public, and were certainly not willing, as today the reigning government proposes, to reveal their intellectual or sentimental faculties»³¹.

He highlighted how only the new political era would have allowed women to publicly express their freely acquired instruction and education, to become exemplary wives and mothers, pointing at Caterina Franceschi Ferrucci and Giulia Molino Colombini as models of education and morality, closely bound to an appropriate religious education. Religion was on the other hand totally lacking from the school prize giving speech made by the councillor for education on 1 June 1873, the date commemorating national unification and the Statute, where he reminded the young people that they were the future of the country and called on them to «study hard, acquire the skills and take up the arms to defend the country and to be its ministers of civil knowledge (understood as) the virtue of the intellect matched by good intentions, applied to all orders of life for the social good»³².

The political climate had changed both nationally and locally. Anticipating national events, between 1868 and 1869 the progressist, pro-Masonic and democratic faction of the city of Bologna had won the Municipal Council election, with their bourgeois and intellectual strengths. Guided by the mayor Camillo Casarini, the new Council reorganised the primary school on a progressist, secular basis, replacing the teaching staff, reviewing the curriculum and textbooks and above all creating new links with the city's mutual aid associations, particularly the secular Bologna League for the Education of the People. Founded in 1871 from the union of numerous local mutual aid associations, the League set out to promote education among the local – particularly adult – population through lessons and night schools teaching the trades, opening a kindergarten inspired by Froebel (1873) and establishing a travelling library with over 2,000 books covering the key issues of the up-and-coming positivism, including self-help, hygiene, the exaltation of science and technique. The League was chaired by the poet Giosue Carducci and substantially managed by Raffaele Belluzzi, patriot, and ex-key member of the Workers' Society of Bologna, along with Giuseppe Bignami, Medardo Burzi and Ferdinando Berti, the very secular councillor for education in 1873. The latter were also – at the same time – key members of the department for education of the Municipality of Bologna and the local Teachers' Society, directly involved in the process of pedagogic and educational renewal in the 1870s. The bond of innovative and secular-progressist policies with the League's cultural policy became increasingly tight, and indeed the 1879

solenne premiazione del 1863 nelle scuole comunali di Bologna, cit., p. 33.

³¹ *Ibid.*

³² *Parole dell'assessore anziano e f.f. di sindaco per la distribuzione dei premi alle scuole comunali di Bologna fatta il 1 giugno 1873*, s.a., s.a., s.e. p. 2.

prize giving included the students of the night schools and holiday schools as well as those from the Bologna League for popular education³³. The speech was given once again by the councillor for education Ferdinando Berti, who was careful to underline the coordinated works of the Municipality, the League and the cooperative movement and associations:

a key feature and circumstance of this prize giving must cheer and console us; it marks a fact which for us has another meaning: it is the union of the Municipality and the League for Education. This union is the agreement between the Municipality and the free associations concerning popular education, it is the harmony of official education and free education. It is the plant of Freedom, transported into the fertile field of education; and which far from being welcomed timidly or fearfully as in some countries, or of being a source of fierce friction with official education in others, here it germinates strong and vigorous, helping and completing and supporting the teaching of both the Municipality and the State. And this union, when concerning popular education in a country like Italy, is a more healthy, effective and regenerating union³⁴.

It was a significant fact that the 1879 prize giving took place just two days after the commemoration of 8 August 1848, a crucial date in the historical memory of Bologna, remembering the battle of Montagnola, the place where the Austrians were expelled from the city during the first war of independence: a key event in the city's memory, which became a secular celebration, blending military success with the success of education:

we wish to celebrate the triumphs of the Homeland, thanks to the victories of education; we wish to celebrate the heroic deeds and the valour of our fathers on 8 August 1848, which marked the splendid start of national redemption, with the recent results of popular education, which are the necessary fulfilment of national redemption, incessant and continuous development³⁵;

almost making the battle of 1848 even more important and founding, for the citizens of Bologna and the pupils present, than the subsequent process of unification:

³³ Archivio Storico Comunale di Bologna, Carteggio amministrativo del Comune, Titolo 'Istruzione' (from now on cited as ASCB, Istruzione), 1876, b. 1018, Rubrica 7 Sezione 10, Fascicolo 'Distribution of prizes to the pupils of the public primary and secondary schools and the children of the nursery schools on Sunday 4 June, the day dedicated to the celebration of the Statute and Italian Unification', Letter from Medardo Burzi dated May 1876 and approval of the council of 5 May 1876.

³⁴ *Discorso pronunciato il 10 agosto 1879 nella palestra ginnastica ex Chiesa di Santa Lucia dall'assessore comunale per l'istruzione Avvocato Ferdinando Berti per la premiazione delle Scuole del Municipio di Bologna Serali e Festive e delle Scuole della Lega bolognese per l'istruzione del popolo*, in *Discorsi dell'avvocato Ferdinando Berti*, Bologna, Società Tip. Già Compositori, 1879, p. 15.

³⁵ *Ibid.*, p. 11.

thus the idea of the Homeland, which drove the heroic deeds of 8 August, still enlightens the following generations; and may everyone who is educated seek to be a useful citizen for his country. And as the idea of the Homeland thirty years ago fuelled the Italian army to redeem it from foreign slavery, thus today it fortifies the mind and reinvigorates the heart, to redeem it from ignorance and poverty, to make it virtuous and wise, prosperous and great³⁶,

without ever mentioning the Savoys, nor the subsequent events, but simply Italy and the Homeland, a probable sign of the accentuation of the local roots in the process of unification recalled to the people, very different from the celebratory and salvific tones attributed to the Gentleman King of the Savoys and of Piedmont in the prize giving speeches of the first years after unification. Certainly, some twenty years after the first official prize giving, much had happened, many changes had occurred in the national and local political scene: the Gentleman King was dead, and the first enthusiastic phase of the unification process was over, not without its difficulties and reserves, particularly concerning the centralising solution imposed from above which the ruling classes of Bologna had resisted³⁷. It is also clear that a public speech during a crowded school prize giving ceremony could be particularly successful if it included more references to the local rather than the national situation. For a member of the ruling classes of the local establishment which however had national reach, exalting the local dimension also meant celebrating the good work of the municipal administration, with clear electoral and political implications. The celebratory tones of the Municipality of Bologna could also be found in Berti's speech given at the prize giving the following November for the pupils of the primary day schools, the *ginnasio* and the local technical schools as well as the nurseries, where he expressed:

great satisfaction on the large number of schools and pupils that the Municipality of Bologna has achieved in popular education. There were 109 primary schools in 1877 and in 1879, in just two years, the number of pupils has increased by 1,000, and from 6,170 it has reached the respectable figure of over 7,000-7,040. This means that the country responds to the care and sacrifices of the Municipality, and that the need for education is understood and felt universally, in all social classes, in all layers of society in Bologna. Of the 7,040 pupils, the majority come from the poor classes, the largest numbers from the families of workers in the trades, farmers, labourers and hired hands, servants, lowly office workers and small shopkeepers: the living proof of the eloquence of the figures and statistics, of the need for popular education to be free, and the usefulness this gratuity has been in ensuring its prompt, widespread diffusion³⁸,

³⁶ *Ibid.*, pp. 11-12.

³⁷ *Sul progetto Minghetti. Considerazioni di Ferdinando Berti*, Bologna, Tipografia di Giacomo Monti, 1861.

³⁸ *Discorso pronunciato dall'assessore Cav. Ferdinando Berti nell'aula di S. Lucia in occasione della premiazione agli Alunni delle Scuole comunali elementari e secondarie e degli Asili infantili il giorno 16 Novembre 1879*, in *Discorsi dell'avvocato Ferdinando Berti*, cit. p. 37.

remembering the silver medal received from the government for the application of the law on compulsory schooling, following the commitment of the municipality and the teachers and the improvements introduced by the municipality: «with the choice of good books, the simplification of the curricula, with the teaching materials the schools are being continuously equipped with»³⁹.

2. *A new phase?*

In the following years the ritual of the school prize giving ceremonies, set in stone by municipal practices and circular letters, underlining their rigorous officiality – mandatory attendance by all teachers, distribution of prizes by class and by merit, school premises in via Garibaldi – ex Pious Schools during the national celebration of the Statute on 4 June⁴⁰, the increasing sophistication of the hymns, written for example by the municipal school inspector Angelo Giamberini, and the multiplication of special prizes established by private benefactors through legacies and donations to the Municipality for categories of students. The prize giving brochures usually included the list of winners, divided by school, teacher and class, but no longer contained the speeches made by the authorities to a vast public, as a form of national education, secular catechesis of the founding values of the local community and the country. This could probably imply a certain tiredness of a communicative register – that of school prize giving – around which lively transversal debate had developed, concerning the excessive officiality and indeed the very function of school prizes, even in the Municipal Council, driven by councillors Bombicci and Acri. Bombicci particularly, who in 1892 had written publicly against school prize givings as fomenting envy and injustice⁴¹, in 1896 had suggested that they be avoided, but the councillor for education Pini had underlined the importance of a secular tradition that was difficult to interrupt without a broad base of consensus⁴². With different motivations, the following year councillor Francesco Acri disputed prize giving for pedagogic reasons:

³⁹ *Ibid.*, p. 39.

⁴⁰ ASCB Istruzione, 1871, b. 861, Rubrica 7 Sezione 10, Fascicolo 'Distribution of prizes. Pupils of the R. Liceo Galvani, the Ginnasio, the Technical School and the public day, night and holiday primary schools, as well as to the children of the nursery schools, on Sunday 4 June, the National Celebration of the Statute and Italian Unification in the municipal Pious School in via Garibaldi'.

⁴¹ «who, among the examiners, for example, investigates whether in the respective families some students receive every facility for studying, coaching and good nourishment, while others instead suffer the outrage of those excruciating chores that distract and tire, in order to facilitate [...] the earning of bread for their parents?» in D'Ascenzo, Vignoli, *Scuola, didattica e musei tra Otto e Novecento. Il Museo didattico 'Luigi Bombicci' di Bologna*, cit., p. 77.

⁴² Bologna Municipal Council Deeds, 23 December 1896.

in the prize giving ceremony, which is now held at the end of the year in the church of S. Lucia, after a speech given by a councillor or by the Mayor, the pupils file past one by one to collect their prize, which is usually a book or other object. Yet what effect do these prizes have on the souls of the children and the spectators? The prize winners are proud; the spectators give no importance to the ceremony. Those who do not win can only feel pain or envy⁴³;

supporting the ‘egoistic’ nature of these prizes, books chosen by the administration and thus subject to ideological evaluations;

and if today, for example, the Council is red in colour, the books will have a red sentiment, if it is black the sentiment will be black, and so on, as this is a philosophical axiom, that everyone believes that they must propagate that which they believe to be true⁴⁴;

proposing alternative formulas to the book The Mayor Dallolio however objected:

that the prizes would be spoiled, if they were medals, crosses or other trinkets, as they would certainly arouse those bad sentiments [...] The book is an educational element for the pupil and his family, and when books are sown in homes they can only harvest good fruits. We give books which comply with the teaching we deliver in the schools: this is a practical form we can use to integrate this teaching: and naturally we give books that are suited to the age and level of culture of the students, so councillor Acri cannot complain if we support the students of the secondary schools by offering them a way to become familiar with the great Italian authors; or if we inspire the pupils of the primary schools with patriotic sentiments. As for the choice of the prize, this is not made by the Mayor, or the Council, but is done in such a way that ensures the diffusion only of good books. Of course he would be ashamed if an Administration used the school, which is of benefit to all, to spread party propaganda: this would be a shameful failure of our duty. The books we give conform that that devotion to the homeland which we must all have; we would certainly not give anti-patriotic books, as we would not give anti-religious books⁴⁵;

so recovering the prize giving event as a moment of national education. It is interesting to note how the two comments against school prize givings came from politically opposite factions: Bombicci’s secular and pro-Masonic side and Acri’s catholic side, marking a common opposition to prize giving for pedagogic and political reasons, sharing the criticism for its substantially selective function. The insistence of Mayor Dallolio on the educational and teaching aspect of the prizes awarded underlined the ‘devotion to the homeland’ as a purpose for schooling, recovering a term from *civil religion*, the word ‘devotion’.

Similarly, in the speech at the end of the century, councillor for education Nerio Malvezzi twice mentioned Queen Margherita who had visited Bologna;

⁴³ Bologna Municipal Council Deeds, 20 December 1897.

⁴⁴ *Ibid.*

⁴⁵ *Ibid.*

a queen offered as a bright star at the start of the speech⁴⁶ and as the guardian of public education at the end («today's celebration, sirs, in the thoughts of the prize winners, and we can say, in our own too, is identified with that of the august and highly educated Queen, who with a very special and vigilant fondness looks to the school not out of charity but through an acute political sense that knows its own time and foresees the future»)⁴⁷ to whom the students should look, learning the virtues of obedience, discipline and constancy, «as a duty of free men and as a civil virtue»⁴⁸, joining that devotion to the homeland remembered solemnly by Malvezzi, with the image, for the first time in a school prize giving in Bologna, of Italy as the mother («and wishing well for you, I wish well for this soul, Italy; of which in school you will learn on the maps and in the books of its configuration and history, but which you must love as a living person, equal to your own mother, and be ready for sacrifice»)⁴⁹.

It was the end of the century, the crisis linked to the return to Crispi's conservatism and the return to the repressive claims on society and on school, the formation of the 'hard-working gentleman' of Guido Baccelli's primary school curricula and an agreed national education that had recovered its conservative dimensions. The protests against the excessive solemnity of the prize giving ceremonies probably provoked some effects, indeed from the archive documentation it is noted that in 1903 they were held without any special solemnity⁵⁰, and were suspended during the First World War and during the Zanardi's socialist council (perhaps for economic, but also political reasons) and were only reinstated after the war in the Fascist period, with the distribution of books and the official prize giving ceremony held in the Municipal Theatre in Bologna, in the presence of the civic authorities and the cardinal archbishop, who was to bless the new municipal gonfalon⁵¹.

⁴⁶ «[O]n this day dear to every Italian so fond of the patriotic decorum that the Queen of Italy personifies and, almost a star, shines with pure light beyond the mountains and beyond the sea» in *Per la solenne premiazione scolastica 20 novembre 1899. Discorso tenuto dall'assessore Nerio Malvezzi*, Bologna, Regia Tipografia, 1899, p. 1.

⁴⁷ *Ibid.*, p. 10.

⁴⁸ *Ibid.*, p. 11.

⁴⁹ *Ibid.*, p. 12.

⁵⁰ ASCB, Istruzione, 1903, b. 4, Letter from Napoleone Masetti to the Mayor of Bologna, 19 August 1903.

⁵¹ ASCB, Istruzione, 1926, b. 1142, Rubrica 3 Sezione 2, Fascicolo 'Prizes', letter from the office manager Masetti 2 February 1926. On the history of schools and education in Bologna in this period, I refer to ID., *Tra centro e periferia. La scuola elementare a Bologna dalla Daneo-Credaro all'avocazione statale 1911-1933*, Bologna, Clueb, 2006.

3. *From project to reality. Educational mediation*

Analysing the speeches given by the Bologna authorities during the school prize giving ceremonies in Bologna seems to confirm that the authorities shared the aim of «making Italians», as already well-known and widely documented in historiography. The speeches include references to the values of the homeland, the Savoys, the common national language, the duty of education, the opposition between the old repressive forms of ‘clerical government’ and the dynamic forms introduced by the new government, with emphasis on the rights of new Italian citizens, equal rights for all based on the Statute. We may however also capture two interesting and particular elements of this ‘local’ reality: on one hand, the centrality of education as an objective to focus on for the transformation of the condition of poverty, a form of social mobility; on the other hand, the emphasis on the local dimension of the history of unification, through the celebration of the prodigious event of the battle of 8 August 1848, marking the persistence of the micro-homeland within the great Italian homeland, at least until the 1880s, when the generation of those who had taken part in those events was still in power, particularly the progressist-democratic part, including Ferdinando Berti and the ruling group in the Department of Education between 1869 and 1883. The study of these variations in the prize giving speeches can also reveal the ‘metamorphosis of citizenship’⁵² throughout Italian history, with the specific character and ‘fine distinction’ of the micro-homelands of the local situations, still very little known compared to the national dimension, and which could reveal interesting surprises for the issue of *Nation building*⁵³.

It also appears interesting for education and school historians to seek to understand if and how the political project of “making Italians” was accompanied by a consistent ‘educational mediation’, through books, curricula and teachers in the schools. In this regard it is worth underlining how the municipal administration of Bologna invested greatly to update its curricula, textbooks and teaching tools, particularly during the progressist season, obtaining impressive results in the literacy statistics. If we focus our attention on the analysis of the exams prepared by the city’s school inspectors for the mid-year and end-of-year exams in the primary schools (day, night and holiday schools, for both boys and girls) throughout the first forty years following unification, some interesting aspects emerge, helping us to understand the

⁵² Ascenzi, *Metamorfosi della cittadinanza*, cit.

⁵³ Historiography underlines the historical difficulty of the construction of the process of unified standardisation due to the need to «recognise a meta-heritage (of a meta-homeland), able to give new meaning to (and not replace) the micro-identities (and the micro-homelands) of the many municipal micro-traditions, and therefore to become a national collective imagination, to be cultivated, handed down, enhanced, pursuing the edification, finally, of a new, generalist rather than particularistic aware memory» in Quondam, Rizzo (edd.), *L'identità nazionale*, cit., pp. III-VI.

political and ideological reasons underlying the objective of national education, with the values of the new political era

4th year boys – Topic for a letter of advice. Cesare answers a letter from two of his school companions who ask his opinion on the talents a true Italian should have; and he says that an Italian is anyone born between the Alps and the sea, and who speaks the Italian language, but the true *Italian* is he who is moral and therefore [...] civilm [...] and who loves his homeland and [...] who writes the national language well and [...]. Explain the four underlying qualities of a true *Italian*, focusing your advice on the culture of the unfortunately neglected language of Italy⁵⁴;

alongside the more traditional ideas of religion, sincerity, hard work, peace, cleanliness and, for the girls, also silence...

Lower 1st year, boys – Dictation.

Words with single direct and inverse syllables to be divided in syllables. Worship God. Tell the truth. Recite slowly. Pay attention to your work. Work well. Do your duty. Be silent and learn. Peace is an asset. Life is dear. Wash your hands. Wash your face. Look after your health.

Upper 1st year, girls. Dictation of some sentences. Speak and be silent in time. Wish everyone well. Speak badly of no one. Pay attention to everything. Know yourself. Listen well and speak little. Are you beautiful? Do beautiful deeds. Are you ugly? Overcome your natural defects with beautiful deeds⁵⁵.

And there were plenty of references to the recent historical events and the war, transformed into an opportunity for education, to write letters or motivate the unification of the country:

It is 1866. The war has broken out once again against Austria. Arrigo, aged 19, decides to enlist as a Volunteer. He doesn't have the courage to bid farewell to his mother, so he departs in secret, and leaves her a letter. Write the letter from Arrigo's point of view.

1. Why you prefer to write rather than say goodbye in person.
2. What are the reasons for you leaving your home, your family, school, etc.
3. What are your hopes and desires when you are in battle.
4. Ask your mother to bless you and ask for her forgiveness for the pain you have caused her.
5. Wish your family and friends well and promise to write soon⁵⁶;

and questions on the rights and duties of citizens:

Rights and Duties. Where did the current Italian Constitution come from, and when was it ratified? Who exercises legislative powers?⁵⁷

⁵⁴ Archivio di Stato di Bologna, Provveditorato agli Studi di Bologna, b. 4, 1865, *Temi per gli Esami semestrali nelle scuole elementari comunali*, 7 March 1865.

⁵⁵ *Ibid.* For other examples see M. D'Ascenzo, *La scuola elementare in età liberale. Il caso Bologna*, cit., pp. 306-307.

⁵⁶ ASCB, Istruzione, 1871, b. 861, Rubrica 7 Sezione 10, Fascicolo 'Primary day schools in the City. Mid-year and end-of-year exams', Year 2 Primary school, body. Language Essay'.

⁵⁷ ASCB, Istruzione, 1872, b. 892, Rubrica 7 Sezione 10, Fascicolo 'Primary day schools in the

with specific references to the glorious battle of August 1848:

It was 8 August 1848. A poor worker, injured on Montagnola during the battle between the people of Bologna and the Austrian soldiers, was brought into my room. They placed him on the bed, and he was joined by his wife and son Giulio (explain what they did for their injured loved one, and what treatment they gave him). The injured man knew that he would die soon and called on his son to be good [...] to study hard [...] and to love his country⁵⁸.

The homeland appears once again as a topic of the language essays:

Italy is a peninsula – it is heralded as the paradise of Europe – ancient peoples lived there, impoverished it and divided it, but now it is united and in peace – Rome the capital was built on the banks of the Tiber – you are Italian and must love your Italy⁵⁹;

and references to national history were present in the history essays:

Respond to the following historical questions, connecting your answers in a single essay. What were the conditions imposed on Italy after the Treaty of Vienna? How many years passed between the Treaty of Vienna and the proclamation of the Kingdom of Italy? By the hand of whom and by which events was Italy constituted into a single kingdom under the Savoy dynasty?⁶⁰;

with illustrious examples of goodness and sincerity, such as General Lamarmora:

Topic for writing a letter. “I was always loyal and truthful to all, General Lamarmora said one day in Parliament; with everyone, even the bandits.” Repeat this sentence to a friend, who, for personal gain, told you a lie⁶¹;

or obedience, like George Washington:

George Washington was appointed General of the American Army during the war against the English and gained independence for his country. Explain how after victory he returned to his private life. Talk of the honours he received along the journey home. Explain how,

City. Holiday Schools in and around the city. Statistical data and results of the end-of-year exams for school year 1871-72’.

⁵⁸ ASCB, Istruzione, 1872, b. 892, Rubrica 7 Sezione 10, Fascicolo ‘Bonetti Prizes for the school year 1871-1872 Award of the prizes to the students of these Municipal Schools, Language Essay for the Exam for the Bonetti Prize, 1st year Primary School.

⁵⁹ ASCB, Istruzione, 1876, b. 1018, Rubrica 7 Sezione 10, Fascicolo ‘Primary Schools in the City. End-of-semester and end-of-year exams’ School year 1875-76 Topics for the mid-year exam. Boys Schools Year 1 - Popular Italian language course.

⁶⁰ *Ibid.*, History Essays, Year 2 Primary.

⁶¹ ASCB, Istruzione, 1884, b. 1264, Rubrica 7 Sezione 10, Fascicolo ‘Primary Schools in the City - Mid-Year and End-of-Year Exams’.

once he reached his country, there was a huge crowd in front of his house to welcome him, and his mother was in the crowd. Describe the meeting between mother and son, and explain how she responded to all who congratulated her: George was always an obedient boy⁶²;

or unknown children offered up as models of devotion to school as a tool for social improvement:

it is told how Enrico, aged nine, was orphaned and how, without any means, he was able to attend primary school, where he was a great honour to himself, and grew to become a fine and virtuous young man, with an honest and comfortable position⁶³.

Specific attention was paid to exams for the girls' schools, which set language tests and mathematical problems linked to the female world, or were simply identical to those set for the boys but replacing the male gender of the character with a female one. The specificity of 'female' pedagogy in the projects of Bologna's ruling classes covered all the *clichés* of women's education at that time, including sincerity, goodness, charity towards the wounds of the country's battles:

Story writing based on a piece read three times by the teacher. The charitable girls. Emilia and Rosina are two good girls. Almost every day they set aside part of their meals to give to poor Roberto, an unlucky soul who lost his sight fighting for the homeland. Poor Roberto praises and blesses them, and when they pass through the streets people call them the charitable girls⁶⁴.

Or pointing to Garibaldi's mother as an exemplary model of a woman and mother:

Rosa Garibaldi. Dictation: Rosa Raimondi was a woman of unusual virtue and worthy of the enthusiasm her son Giuseppe always felt for her: certainly her fair and firm figure had great and positive effects on General Garibaldi's lucky and eventful life. Indeed he states in his memories: Is it not perhaps to her angelic nature that I owe my own goodness? Is it not perhaps to her goodness, her infinite charity, her fondness for the unfortunate souls that I owe my love for the homeland? I believe I can explain it all with these words: «She was a model mother»⁶⁵;

⁶² ASCB, Istruzione, 1876, b. 1018, Rubrica 7 Sezione 10, Fascicolo 'Primary Schools in the City. Mid-year and end-of-year exams' School year 1875-76 Topics for the mid-year exam. Boys School Year I, Popular Course, Mid-year Exam - Primary Course - Narration - Year I.

⁶³ ASCB, Istruzione, 1876, b. 1018, Rubrica 7 Sezione 10, Fascicolo 'Primary Schools in the City. Mid-year and end-of year exams', Year 1 Primary Course, Boys School, Italian Language Composition.

⁶⁴ ASCB, Istruzione, 1881, b. 1232, Rubrica 7 Sezione 10, Fascicolo 'Municipal Primary Schools. Admission, resit and diploma exams for class 4', Year 2 Popular girls programme, 26 September 1861, Admission and resit topics.

⁶⁵ ASCB, Istruzione, 1884, b. 1264, Rubrica 7 Sezione 10, Fascicolo 'Primary Schools in the City - Mid-Year and End-of-Year Exams'.

that is to say a sort of angelic vision of a secular Madonna, attentive to the wretched, charitable, kind, caring, offered as a worthy model for the schoolgirls of Bologna.

Towards the end of the century, in the turbulent times of Crispi and Umberto I, alongside the prize giving speeches also the contents of the topics of the mid-year and end-of-year exams became more conservative, referring to absolved duty, punctuality and work:

Section II. Dictation.

You go to school to learn such good things, to cultivate the mind and the heart, to learn all the knowledge that is useful in life. Being born rich is not a virtue, as it is not a demerit to be born poor. It is on the other hand a virtue to gain a flourishing position through study, practice and hard work.

Handwriting: Copy 4 times. He who works has bread.

Section III. Dictation.

Go to work punctually, at the set hour, a few minutes early but never after. Go with the peaceful spirit of he who makes himself an honest living. Work hard, as if the work you have chosen, what you have in your hands, was yours. Indulge in silence in your work. In silence you will find the concentration you need to do your duty well⁶⁶;

religion and God, the latter elements being totally absent after 1869:

Oh Lord, you who have given us a homeland! You have kept it for us. Enlighten the minds, touch the hearts of all Italians, that all understand how great it is to have a homeland, and what a great duty it is to love one another. Oh Great God, protect the Italians, keep their King long, give men intelligence and constancy, adorn women with modesty, and let it be that for centuries to come the Italians together, united and glorious, may fondly celebrate the day of the rebirth of Italy⁶⁷;

and hygiene, as a form of cleanliness and greater socio-economic productivity:

Italian language. Dictation

Emilio is the son of a poor farmer, but is as ruddy as a pink apple, and his clothes of rough cloth are always clean, as if they came fresh from the wash-house. He eats only at mealtimes, is not afraid of water and washes at the fountain. When he has some time free from his studies, he goes out to the fields to help his father. This is how he acquires and keeps his health⁶⁸.

These examples seem to confirm the systematic adaptation of the exams to the different forms of national education introduced in the course of the city's school history. If we look closer, however, examining the archive materials of the exams from Unification onwards – which obviously cannot all be considered fully

⁶⁶ ASCB, Istruzione, 1899, b. 2 Rubrica 7 Sezione 2, Fascicolo 'Holiday Schools in the City and the Outskirts. Exams'.

⁶⁷ *Ibid.*

⁶⁸ *Ibid.*

here – similar examples to the above were of course common, but were neither excessive nor widespread: for example, there were absolutely no references to national pedagogy in the arithmetical questions, which spoke of workers and farmers toiling with the land for measuring and selling, or shopkeepers with problems of measuring quantities, or buying and selling. More often the exams made no references at all to the above political matters. They expressed the ‘perennial’ values that the school institution has always presented its pupils: obedience, goodness, duty, study, sincerity, respect for God and for your fellow man, also in forms of charity; these values, conveyed through famous or less well known characters, from classic fairy tales and from history. Therefore it can be said, in the overall economy of the exams examined over a forty-year period, even with a significant number of examples which have the explicit objective of national education, the idea of such a dominant, intentional and binding educational commitment of the ruling classes towards such objective cannot be supported. The exams in fact reveal the persistence of questions linked to the dimensions rooted even more in the history of schooling: that of a place for acquiring the values and models of civil behaviour and, indeed above all, the three «r’s» – reading, writing and arithmetic; these two dimensions belong to the ‘long life’ of the history of school, interposed by the various political and cultural seasons with their values and heroes, never totally able to penetrate and upturn teaching, which maintains a kind of underlying ‘impermeability’, particularly that of the primary schools, characterised by the urgent need to quickly transmit the ABC to a «child population» crushed by the weight of poverty and the lack of bread.

Study and interpretation of citizens' multiple identities in Spanish schoolbooks on «Education for Citizenship and Human Rights»

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ABSTRACT: This work is the result of a wider investigation linked to an R & D project led by Professor Gabriela Sauter Ossenbach UNED (Spain) in collaboration with another Project of Excellence (P07-SEJ 03305), completed in 2013, funded by the Ministry of Innovation, Science and Enterprise of the Autonomous Community of Andalucía (Spain) and FEDER funds led by Professor Miguel Beas Miranda. The article analyses from an interpretive perspective and based on the methodology used by the MANES project, the manner in which the multiple and complex, municipal, state or regional, national, European and global citizenship identities are treated in the textbooks most widely used in Spain on the subject of «Education for Citizenship and Human Rights» at the stage of secondary Education. We hypothesize that the textbooks, which tend not to contain controversial elements for reasons mainly due to the market, primarily reflect a global or cosmopolitan identity, which weakens the development of other citizen identities in which the subjects could play a more active part. The first part of the work analyses the concept of multiple identities from different theoretical frameworks and sets out our position. The second part examines whether this model of identities or others predominate in the school textbooks on the subject of «Education for Citizenship and Human Rights» at the stage of Compulsory Secondary Education in Spain.

EET/TEE KEYWORDS: Citizenship; Identity; Social Environment; Intercultural Education; Inclusion; Education System; Spain; XX-XXI Centuries.

Introduction

Concepts using the singular (youth, humanity, Spanishness, writing, etc.), usually impoverish them, because while they simplify, they also hide the complexity and diversity of appearances. Science is a controversial area, although in parallel it runs the risk of determining absolute, eternal, immovable truths. The concept of identities includes multiple meanings; this work focuses on identities that allow us to recognize ourselves as citizens.

These identities are ambivalent, because while we are integrated into a sociocultural context, we differ from others, and ambiguous, because they relate us to individual and collective rights and duties. These are provisional because they are in constant process of development. Nothing is imposed once and for all. Modernization and progress imply change. «Identities are to wear and display, not to stay with and keep them»¹. Manuel Castells² understands identity as a process of individual or social construction of cultural attributes. Beyond what unites and differentiates individuals and groups, subjects are free and, at least in theory, have the capacity for autonomy and decision-making that affects the flexibility and relativism of our identities.

Identity is a complex term that can be analysed from multiple theories and scientific fields such as Psychology, Philosophy, Mathematics, Sociology, Anthropology, History, Education, etc. But not all authors have analysed identity from a particular science. Edgar Morin³, concerned to show knowledge as without divisions and compartments, respects the individual and the singular considering its interrelation with the context and with everything. He positions himself against the juxtaposition of knowledge and in favour of the anthropo-social complexity in an attempt to integrate multiple identities. The complexity of human, social and political problems has led him to the development of knowledge of people without divisions or compartments which deprive human beings of having biological identity, subjective identity and social identity at the same time.

The construction of the Autonomous State in Spain, with seventeen Autonomous Communities, developed the theme of identity beyond a single national identity as perceived from the creation of modern states. From the 1980s, the curriculum was fragmented taking the final endorsement of Organic Law 1/1990 of 3 October, the General Educational System⁴ (LOGSE,

¹ Z. Bauman, *Identidad*, Madrid, Losada, 2005, p. 190.

² M. Castells, *La Era de la Información*, Vol. II: *El poder de la identidad*, México Distrito Federal, Siglo XXI Editores, 2001.

³ E. Morin, *El método 5. La humanidad de la humanidad. La identidad humana*, Madrid, Ediciones, 2006.

⁴ Ley Orgánica 1/1990, de 3 de octubre, de Ordenación General del Sistema Educativo (Boletín Oficial del Estado 4 de octubre de 1990). In « » (and from now on cited BOE) de 4 de octubre de 1990, Art. 4. (Organic Law, 1/1990, 3 October, on the Ordination of the General

Art. 4) where participation in the construction of the curriculum of regional communities became effective, developing simultaneously a plurality of autonomous identities. Everything stated above indicates the complexity of the term and the need to clarify and contextualize it. In this sense, the term identity relates to citizenship and political culture. We refer to citizens' multiple identities where they can exercise their rights and duties as such: in the town, autonomous community/region, nation, Europe or the world.

In this research, we reflect on two hypotheses: the first is that there is great difficulty involved in participating in building multiple and inclusive identities so that, with the system and political culture in which we live, we believe that our role as educators is very minor and there are few avenues open to us to develop a participatory political culture. We believe that identities are constructed to the extent that individuals assimilate and internalize social, cultural civil and political elements from different scenarios. One of the most used educational resources in schools is the textbook, hence the importance of analysing their contents. In our case, we want to know if the identities that textbooks reflect are inclusive, contrary to stereotypes that simplify and mark individuals and groups; if besides establishing multiple identities, they promote tolerance and recognition of that plurality and if textbooks shape the knowledge of democratic institutions. We set as our second hypothesis that the textbooks with the highest circulation in Spain do not usually contain controversial elements mainly for marketing reasons, primarily reflecting a global or cosmopolitan identity, weakening the development of other citizenship identities in which subjects can engage in a more active way.

In the first part of the work, we examine the concept of multiple identities from different theoretical frameworks and explain our position. In the second, we examine models of identities that predominate in textbooks on the subject of «Education for Citizenship and Human Rights» taught at the stage of Compulsory Secondary Education in Spain.

1. Difficulties in the construction and development of inclusive multiple identities

There are several reasons that hinder our participation in the development of identities: first, the cultural relevance that the identities constructed from outside of the groups that tend to foster personal and cultural stereotypes; secondly, the traditional predominance of essentialist identities in nationalisms; thirdly, the limited development of thoughtful, participatory citizenship and

finally, because not all theories based on the concept of citizenship defend inclusive plurality of identities.

1.1. *Against imaginary identities*

When we talk about identities, there is usually consensus in affirming that every person has one that is individual and that sets that person apart from others. It is common that identities that develop from outside of the groups, based on stereotypes and imaginary groups, do not support a minimum of critical or rational inquiry⁵. We agree with Pageaux and Machado⁶, who assert that the study of the image of the foreigner or the other should be studied first, as one of the creatures that inhabit a larger complex, which is the representation of the other in the social imaginary. The emergence of images and their corresponding study has gone through a number of trends that have even shown their danger, such as the very famous folk psychology or ethno-psychology, trying to establish an average image of the individual belonging to a social or national group.

One of the most worthwhile works within this genre is that of Jean Roger⁷ whose basic argument is: people have an eternal «being», and thus a recognizable character or personality. Therefore, it is possible to understand human beings if they are part of national entities. Nationality is the unavoidable presupposition of the intelligibility of human beings. From this reasoning it follows that for various reasons, such as race, religion, climate, historical experiences; there are the great literary myths that exist in the cultural community, etc: the English will be practical, the French rational, the German heavy and the Italian artistic, the Portuguese melancholy, and the Spanish quixotic, and so on. These are the stereotypes that reduce the 'other', classify and reassure us with their presence, inviting us not to practice a more complex and burdensome task of deep understanding.

Our personal and social identities are composed of multiple interrelated elements in a continuous process of evolution and even, sometimes, we are forced to choose between the prevalence of any of these elements, rejecting others. However, it may be common practice to reduce the set of ethnic, religious, political, national elements, etc. into one that simplifies while obscuring all understanding of identities, for although hierarchical, none of them cancels out the others.

⁵ M. Beas, M. Díaz, *Las imágenes del "otro" como objeto de análisis dentro de las ciencias sociales y en la imagología comparada*, «Revista de Ciencias de la Educación», n. 188, 2001, pp. 463-475.

⁶ D. Pageaux, A. Machado, *Da literatura comparada a teoria da literatura*, Lisboa, Edições, 1998.

⁷ J. Roger, *Psicología de los pueblos: cómo son los franceses, alemanes, rusos, etc., de hoy*, Madrid Rialp, 1963.

An essentialist identity is meaningless as shown by Amin Maalouf⁸ since as well as being multiple or complex, its identifying features are changeable. However, there is a habit of mind as widespread and as pernicious according to which a person can express their identity just by saying I am an Arab, I am French, I am black, ... while it is convenient for us to attribute collective opinions: «Serbs have massacred... », «Jews have confiscated... », «Arabs refuse... ». As Malouf writes:

But it seems to me important that we are all aware that these phrases are not innocent, and that they help to perpetuate prejudices that have proven throughout history their capacity for perversion and death. It is our gaze that often buries others in their most limited characteristics, and it is also our gaze that can free them from them⁹.

1.2. *Challenges for the construction of multiple and inclusive identities*

Tolerance and recognition are basic principles that promote peaceful coexistence and collide headlong against any negative discrimination that undermines a constitutional equality. As Jürgen Habermas¹⁰ says identities are part of collective processes, of common interpretations. We live simultaneously with multiple cultural, political, economic and social identities implying that the identity construction of a society should not exclude the construction and development of other identities. Migration and the flow of people affect a lack of delimitation of the subjects that make up identities. The interdependence of peoples and states in the processes of globalization dilute borders, developing a cosmopolitan identity based on Human Rights that should be respectful of ethnic minorities; but this does not always occur.

For most citizens, it is difficult to construct identities through dialogue, reflection and participation in democratic contexts in which participatory political culture materializes every four years in voting to elect municipal, regional or national representatives or every five years for the European Union unless we involve ourselves in the operation of some political party, association or democratic institution. In other words, there is enormous difficulty in finding spaces and instances where citizens can actively participate in the construction of their identities. Simultaneously, we see a dereliction of citizens' duties favoured by a distancing from political life. A large part of society is bored with the behaviour of the political class which has led to disaffection and a rejection of the political culture of its members as reflected in surveys and sociological studies¹¹.

⁸ A. Maalouf, *Identidades asesinas*, Madrid, Alianza Editorial, 1999, pp. 32-33.

⁹ *Ibid.*, p. 33.

¹⁰ J. Habermas, *La inclusión del otro. Estudios de teoría política*, Barcelona, Paidós, 1999.

¹¹ F. Llera, *La crisis política*, in J.J. Toharia (ed.), *Pulso de España 2010. Un informe sociológico*, Madrid, Biblioteca Nueva, Fundación José Ortega y Gasset-Gregorio Marañón, 2011.

Finally, the impoverishment of public debates, where citizens observe through the mass media that the political class is systematically confronting the other parties, monopolizing the truth and assuming as absolute that the political adversary will not accept any of their proposals, so that it is rare if a constructive dialogue occurs. Plurality has no place in the discussion. It also happens frequently that representatives, once elected, do not act as rulers of the whole community, but as executors of the principles and tenets of their political party, which in fact, in practice, puts an end to all pluralistic, flexible and inclusive approaches. We believe that partisan interests often prevail over the general interest.

1.3. *Deconstruction of essentialist nationalist identities*

Identities are not fixed that one acquires or inherits innately; by contrast, they are usually a set of features that may be developed, even modified or changed. Traditionally, an essentialist concept of nation based on elements that were considered inflexible and defining has been imposed: a territory in which society was based; a model of political organization around the state and a number of cultural components among which are language, historical background and the predominant religion, which in the case of Spain is Roman Catholic. Ethnic reasons have been imposed on what today might be called reasons for citizenship. But far from being socio-cultural constructs they were considered defining elements of the identity of a people that had to be transmitted and accepted without criticism. In this sense, the school has played a key role in the dissemination of national identities and education for citizenship as shown by numerous studies collected in the work of María del Mar del Pozo and Francisco Antonio Canales¹².

From Romanticism, history has been built around the idea of the nation based on myths, heroes, language (defined as the form of cultural communication of a people), religion, state, institution building, moral and political trends, etc. However, after the animosity toward nationalism that swept Europe after 1945, the story of history has been open to other paradigms such as economic and social history, linguistic turn and cultural history. But it has steadily built a story that continues to maintain the nation as a hub, but with a high level of self-criticism¹³. Citizen participation in collective rituals and symbolic practices

¹² M. Del Pozo, A. Canales, *Educación, ciudadanía e identidad nacional en la España contemporánea*, en A. Barrio, J. Hoyos, R. Saavedra (edd.), *Nuevos horizontes del pasado. Culturas políticas, identidades y formas de representación*, Santander, PUBliCan-Ediciones de la Universidad de Cantabria, 2011, pp. 233-250.

¹³ F. Archilés, *¿Fin del paradigma nacional? La nación en la historiografía contemporánea*, in Barrio, Hoyos, Saavedra (edd.), *Nuevos horizontes del pasado. Culturas políticas, identidades y formas de representación*, cit., pp. 74-94.

are Hobsbawm's proposals to explore the construction of national identities where people not only represent a tradition, but participate in its definition and construction; he calls it the «invention of tradition»¹⁴.

Today, there is a broad academic consensus that considers identities are not a set of key elements that characterize a society and that endure over time, but rather socio-cultural constructs that must be reconstructed and reinterpreted in each historical moment for the societies concerned. A significant example can be seen in the Catholic religion that has ceased to be a key part of our common Spanish identity, having no official character and guaranteeing that freedom of ideology, religion and worship for individuals becomes personal and private¹⁵. Although this is unquestionable, so is it that there is a long tradition that has seen the pairing of the political and religious from the Middle Ages until today as logical, considering it as one of our identifying characteristics. Until recently it was not assumed that sovereignty resides in the people, nor in their beliefs, past, language, etc. Thus, when interpreting the Middle Ages, the myth of Catholic unity has developed despite accepting a multicultural and multi-religious context. Spain has been named as a nation, for example in primary and secondary school textbooks from the conversion of Recaredo. The idea of nation implies a secular legitimacy. However, in Spain until 1978, conservative opinion merged Spanish identity with Catholicism¹⁶.

In Spain the Autonomous State has not been managed well, and it has developed a nationalist hegemony with confrontation between Autonomous Communities and the Central Government. When we reflect on what differentiates us, our ethnic identities, our past without thinking about building multiple, consistent, inclusive identities, we are fighting, confronting each other rather than seeking consensus; for the past, for the future.

Sexual, social and cultural identities are uncertain, fleeting; Bauman calls them «the fluid world of fluid identities» and believes that «a unitary identity, firmly fixed and solidly built would be a drag, a constraint, limiting the freedom to choose [...] In short, it would be a recipe for inflexibility»¹⁷. Identities are not carved in stone, are not protected with a lifetime warranty; quite the contrary, they are eminently transferable and revocable. They are not a destination and a lifelong condition although those who have the power to do so throw this conviction at us.

¹⁴ J. Hobsbawm, T. Ranger, *La invención de la tradición*, Barcelona, Crítica, 2002.

¹⁵ *Constitución Española*, 1978, Art. 16. (Spanish Constitution 1978).

¹⁶ J. Álvarez, *Máter dolorosa. La idea de España en el siglo XIX*, Madrid, Taurus, 2009.

¹⁷ Bauman, *Identidad*, cit., p. 117.

1.4. *Models of citizenship and their relation to inclusive multiple identities*

Both classical liberalism and communitarianism are contrary to inclusive identities; with different reasons and arguments, they defend leaving political functions in the hands of their representatives producing a disaffiliation and impoverishment of political culture which in turn, weakens participation in the construction of common identities. In identities, two values are related; freedom of choice and safety in the community: liberalism and communitarianism enhance one over the other. Yet, the two values are needed because freedom is necessary for the self and this, socially, needs the community with greater cohesion than the sum of individuals. Speaking of multiple identities involves the development of social rights, acceptance of minorities, gender equality, political and cultural pluralism, the effective recognition of freedom of expression or the consideration of difference as a constitutive fact of human identity. The assimilation and exclusion of differences are the opposite of what inclusive multiple identities imply. On the other hand, considering complex identities requires managing differences and what they generate: ambiguity, confusion, plurality and flexibility.

The republican model requires a personal commitment to common interests. Representation in democracy must be inclusive, i.e. representing all citizens and not just certain groups, elites and minority interests. For republicanism, governments and parliaments are not elements unconnected with social bases, but rather they are the source of power and should also be a participatory democratic process. Numerous criticisms have also made of the republican model as mechanisms for disseminating information that are not always the most transparent; the channels of grassroots participation are not effective; there is a lack of competence for citizens to decide on certain issues; it is equally difficult for citizens to accept a constructive dialogue in which it is assumed that the plurality of subjects and viewpoints and discussions are not absolutely true: the prominence of certain groups in debates and their influence in decision-making, while others are excluded or at risk of socio-cultural vulnerability (older people, women, unemployed, poor, poorly educated, etc.). People play a very secondary role, etc.

The purpose of reflective and deliberative democracy is that citizens are responsible actors and not mere voters for their representatives. For this reason, public deliberations must be transparent, based on constructive dialogue and consensus building. This model of democracy is not strictly an innovation of democracy, but rather its renewal: deliberation moved to the political sphere involves a demanding specification of the participatory ideal that the notion of democracy embodies¹⁸.

¹⁸ J.C. Velasco, *Democracia y deliberación pública*, «Confluencia XXI. Revista de Pensamiento Político», n. 6, 2009, p. 75. In particular pp. 70-79.

Deliberative or reflective democracy seeks to find and construct common interests through social pacts. This is, probably, the most important positive feature; the ability to institutionalize the collective discovery of common interests. Questioning this collective identity, reflecting on approaches contrary to it is a way to improve democratic life and, therefore, our civic identity. Humanity's inclusive identity, to which Kant alluded and that today is known as cosmopolitan citizenship, pushes back the boundaries of exclusion. But this is one of the many existing identities and with obvious signs of weakness because although full of ethical principles, it lacks political and legal institutions, etc. to solidify its principles¹⁹. In theory, it is a very inclusive model, but in practice, «the majority is excluded from the global feast- no “multicultural bazaar” for them»²⁰.

Jürgen Habermas²¹ argues for an active, participatory, critical and reflective-based citizenship based on democratic constitutional principles and universal human rights, as opposed to ethnic and cultural nationalism. This form of democratic and cultural identity is intended to be inclusive and pluralistic in the cultural sphere. However, in a context of severe economic crisis such as we are now experiencing, messages are often sent to individuals where they are encouraged to seek private remedies for socially caused troubles, while the state cuts the budget for health, unemployment, education, public works, etc. As mentioned before, with the dismantling of the welfare state, the state is no longer the custodian of public trust while at the same time the concept of citizenship is being emptied of content.

Flexible, multiple and inclusive identities are not compatible with establishing boundaries between different collective identities in a society. An example can be seen in the development of European identity where it is difficult to conceive the common good as a sign of collective identity. It seems that on the one hand, Europe is not a place where the common good is discussed but rather where the particular interests of states are defended. Furthermore, Europe also influences and modifies the internal interests and decisions of States. Something similar happens in Spain with the Autonomous State and governments of the Autonomous Communities, although in this case there is only one state.

Several judgments of the European Court of Human Rights have made it clear that human rights guarantee the plurality of identities and cultural diversity²²; in this regard, respect and recognition of the multiplicity of elements that compose identities must be based on them and not in defence of some

¹⁹ M. Beas, E. González, *Cosmopolitan citizenship in Spanish textbooks on education for citizenship*, «History of Education & Children's Literature», vol. 5, n. 2, 2010, pp. 247-271.

²⁰ Bauman, *Identidad*, cit., p. 204.

²¹ J. Habermas, *Identidades nacionales y postnacionales*, Madrid, Tecnos, 1989.

²² S. Sánchez, *Perfiles de la integración del extranjero*, en S. Sánchez (ed.), *La integración de los extranjeros. Un análisis transversal desde Andalucía*, Barcelona, Atelier Internacional, 2009, pp. 31-62.

specific elements that make ethnic identities such as language, religion or socio-economic criteria, which when misused, nullify the other elements. At the state level, respect for democratic principles, fundamental rights and basic freedoms, are collected in the respective constitutions; in what Kymlicka²³ called «civic nationalism» that guarantees the differential multiplicity and integration of different cultures.

2. *Sample and analysis of textbooks*

The first textbooks for the subject «Education for Citizenship and Human Rights», which can be taught in 2nd or 3rd grade of Secondary Education (12 to 13 year olds), were published in 2007 in line with the Organic Law 2/2006 Education (LOE)²⁴ and Royal Decree 1631/2006²⁵. Generally, the modifications made in the textbooks are usually formal, not of content or structure, unless being edited as a result of a new education law, which has recently become rather common.

Our analysis is based on studies²⁶ that examined a sample of 1,082 schools in 2007/2008, the year when the subject «Education for Citizenship and Human Rights» was implemented in compulsory secondary education. This provided a very reliable editorial map, i.e. the publishers' market share of the books on the subject under discussion. In this sense, the publisher SM reached a domestic market share of 28%; the Santillana, Anaya and Oxford publishers, overall, obtained 38%; the third group consisted of Pearson and Edebé with 13%. A fourth group was made up of the editorials Octahedron, Serbal, Bruño, Algaida and Casals with 15% and finally, there is a fifth group consisting of MacGraw-Hill, Editex, Edelvives, Vivens-Vives, Everest and Laberinto with 2%. Some publishers offer two lines of text books as does the publisher Anaya which includes in its offer texts such as «Fundación Entreculturas» and Algaida, part of its publishing group; Santillana adds the project «Proyecto la Casa del Saber» or Laberinto Ediciones that offers two texts made by two different teams of teachers respectively prefaced by a renowned author, like Fernando Savater, and Victorino Mayoral Cortés, a politician.

²³ W. Kymlicka, *Ciudadanía multicultural*, Barcelona, Paidós, 1996.

²⁴ Orgánic Law 2/2006, 3 May, on Education. (BOE, 4 May 2006).

²⁵ Royal Decree 1631/2006, 29 December, establishing minimum teaching for Compulsory Secondary Education.

²⁶ E. González, *Ciudadanía, identidades complejas y cultura política en los manuales escolares andaluces de educación para la ciudadanía y los Derechos Humanos*, Granada, Editorial Universidad de Granada, 2011. E. González, I. Montero, *Libros de texto y mapa editorial: análisis de la ciudadanía, las identidades y la cultura política*, in M. Beas, *Ciudadanías e identidades en los manuales escolares (1970-2012)*, Sevilla, Díada Editora, 2013, pp. 89-117.

We have analysed all of them, without forgetting what texts are the most widely used. For this reason and for reasons of space, we refer mainly to six publishers who have 79% of the market (SM, Santillana, Anaya, Oxford, Pearson and Edebé); We have also analysed other publishers like Laberinto and Algaida in order to extend the sample. We cannot cover more in this analysis because of publication limits for this research.

To analyse the content of textbooks dealing with inclusive multiple identities, we have focused on various elements that have been examined in the first part of this research and we consider structural in the subject of this study.

2.1. *Analysis of specific teaching units concerned with personal identities*

The most widely used textbooks either include a teaching unit that deals specifically with personal identities or alludes to them transversely. As mentioned above, the defence of a plurality of personal identities constitutes acceptance of other identities and radical opposition to personal and socio-cultural stereotypes.

The third teaching unit of the publisher Anaya is called «Todos somos iguales y diferentes»²⁷ (We are all equal and different). It starts with the idea that in family life and in other social contexts, people's equality must be reconciled with their differences, implying a responsible and equitable acceptance of citizens' rights and duties. The contents serve the purpose of «learning to respect different people»²⁸. It reflects on the need for acceptance of different views and behaviours because, as Pullman says²⁹, thought and action go hand in hand; However, what we do, the facts, are what is valued legally and morally, not our thoughts or intentions. The text also makes a clear distinction between individual differences and social inequalities, mainly the economic origin as sources of injustice that harm the most disadvantaged; it analyses, as an example, the homeless who are often subjected to endless abuse: physical and sexual abuse, threats, theft, etc. and who also have additional problems such as unemployment, alcohol and drug addictions³⁰.

The Editorial SM also contains a specific unit (6) on personal identity, «Who I am» (*Quién soy yo*)³¹. The initial image that opens this unit is a set of fingerprints on which there are small photos of people's faces. The text repeatedly refers to respect for personal identities based on sex, religion or

²⁷ P. Navarro Susaeta, C. Díaz Martínez, *Educación para la ciudadanía*, Madrid, Anaya, 2007, pp. 29-38.

²⁸ *Ibid.*, p. 32.

²⁹ P. Pullman, *Contra la "identidad"*, Barcelona, Seix Barral, 2010.

³⁰ P. Navarro Susaeta, C. Díaz Martínez, *Educación para la ciudadanía*, Madrid, Anaya, 2007, p. 32.

³¹ J.A. Marina, *Educación para la ciudadanía*, Madrid, SM, 2007, pp. 100-117.

ideology³². It argues against stereotypes transmitted by advertising related to physical appearance and models of social success. Speaking of national identity, it does not mention that there are various policy options and civic institutions that reflect a plurality of identities. «We are part of a nation, a culture, a religion, and as part thereof, we acquired a national, cultural, religious identity, etc. Each of these identities is part of our personality»³³. The text supports on one hand the multiplicity of personal identities related to body and ideological aspects; however, when it refers to national identities it defends an essentialist identity that does not fit with the development of inclusive multiple citizenship identities that we propose.

The Oxford publisher expresses itself in similar terms as it relates «Identity and self-esteem»³⁴. Identity is considered as something personal, fixed and immovable. «Identity is the consciousness of oneself as a fixed entity separate from the outside world»³⁵. Obviously it rejects any form of discrimination and accepts plurality within the constitutional framework: «We all have a duty to achieve a more tolerant society with our actions and we must show attitudes of rejection of any form of discrimination»³⁶. We consider that one issue is the recognition of multiple personal and ethnic identities, and another is political identities, and all of them should be the subject of civic education. Some publishers such as Santillana³⁷ or Laberinto³⁸ in the two editorial choices offered do not include a specific unit dealing with the issue of personal identity.

2.2. *Equality, tolerance, recognition, coexistence and solidarity as antidotes to discrimination and exclusion*

In the discourse on identity construction it is usual to start from the elements that unite us, but the Anaya³⁹ textbook refers first to the differences, focusing on them in a context of citizen equality and cooperation. Differences and shared aspects are the two pillars of identities whose relations are established aiming at the common good, which requires a commitment to the defence of principles such as tolerance, recognition, negotiations to reach agreement,

³² *Ibid.*, pp. 102-105.

³³ *Ibid.*, p. 104.

³⁴ M. Amoedo Escribano, *Educación para la ciudadanía y los Derechos Humanos*, Madrid, Oxford, 2007, pp. 8-9.

³⁵ *Ibid.*, p. 16.

³⁶ *Ibid.*, p. 33.

³⁷ C. Pellicer Iborra, M. Ortega Delgado, *Educación para la ciudadanía. ESO*, Madrid, Santillana, Proyecto la Casa del Saber, 2007.

³⁸ J.J. Ordoñez, C. Díez, J. Paredes, E.M. Peña, F. Muñoz, *Educación para la ciudadanía y los Derechos Humanos*, Madrid, Laberinto, 2008 (Prologue by Victorino Mayoral); J.J. Perea, E. Gómez, J. Pagés, F. Muñoz, M.J. Montes, *Educación para la ciudadanía y los Derechos Humanos*, Madrid, Laberinto, 2007 (Prologue by Fernando Savater).

³⁹ Navarro Susaeta, Díaz Martínez, *Educación para la ciudadanía*, cit., p. 50.

finding meeting points, respecting minorities, understanding, dialogue, etc., that is, the defence of shared rights and duties that promote coexistence. This text⁴⁰ considers that conflicts are generated mainly by the scarcity of resources and job competition and secondly, by the incompatibility of beliefs and civic behaviour. As solutions it argues that the former can be resolved through equal and adequate distributive justice, the second through the integration of cultures in common democratic civic values borne of human rights. Unit 8 «Solidarity as a right and duty»⁴¹ develops another basic principle of coexistence of modern societies: solidarity, the principle underpinning social rights, reducing the risk of economic inequality and promoting socio-cultural integration.

The SM textbook defends the dominance of cosmopolitan citizenship at the expense of other models like the liberal, republican or communitarian. It argues that the way to participate in world citizenship is by taking part in the immediate environment: «We are world citizens residing in a particular locality»⁴². From the same perspective, acceptance of minorities and coexistence with other cultures⁴³ has to be made to develop an inclusive identity in a universal context.

Santillana's teaching unit (4) is called «A plural society»⁴⁴ and states that «diversity enriches coexistence, although sometimes it is difficult to accept differences»⁴⁵. Recognition takes away uniqueness from the subject individual and gives it a new dimension able to recognize itself and at the same time to recognize, thus implicitly knowing its capabilities and limitations and those of others. Without this process, it is very difficult to develop mature ethical relationships, which is a challenge for the educational world.

It is a fact that people have different worldviews, play different roles in society, belong to unequal socioeconomic strata, but we share the same human dignity; in so far as that equal dignity is recognized and respected, the concept of citizen transcends the merely formal, regulatory, and is installed in the moral, as the basis of the political⁴⁶. The Santillana textbook contains numerous examples whose aim is that students observe the diversity of people around them, who understand the scope of the right to equality and to encourage a critical analysis of prejudice against different people, stereotypes, anti-Semitism, racism, xenophobia, Islamophobia, homophobia, etc. It is not easy to educate social skills that develop tolerant attitudes to a plurality of identities, accepting flexibility in behaviour and ideas and recognition. Diversity can be a source

⁴⁰ *Ibid.*, p. 111.

⁴¹ *Ibid.*, pp. 80-89.

⁴² Marina, *Educación para la ciudadanía*, cit., p. 141.

⁴³ *Ibid.*, p. 145.

⁴⁴ *Ibid.*, p. 50.

⁴⁵ *Ibid.*

⁴⁶ A. Honneth, *Reificación: un estudio en la teoría del reconocimiento*, Buenos Aires and Madrid, Katz Barpal Editores, 2007. A. Honneth, *Crítica del Agravio Moral: Patologías de la Sociedad Contemporánea*, Buenos Aires, Universidad Autónoma Metropolitana, 2009. A. Honneth, *Crítica del Poder*, Madrid, Editorial Antonio Machado Libros, S.A, 2009.

of cultural richness, but when differences are perceived with hostility, they generate conflict. Therefore it is important to consider that recognition helps us build a more peaceful and tolerant society⁴⁷. Throughout, Santillana's texts are dominated by allusions to differences that focus on personal, cultural and social factors, with very few allusions to civic and political pluralism. This text makes constant reference to the Universal Declaration of Human Rights but not to the Spanish Constitution when dealing with equality, dignity, liberty and all rights of individuals.

Edebé, meanwhile, refers to the relationship of individuals to society in several teaching units. It openly addresses the issue of social prejudices and stereotypes as generators of rejection, highlighting racism, xenophobia, sexism and homophobia⁴⁸. Unit 5, «In a pluralistic society»⁴⁹ analyses the ethnic diversity of contemporary societies and specifically in Europe. However, it says nothing about the plurality of citizen identities.

Personal identity as presented by Pearson publishing is characterized by what each individual thinks, feels and acts and is influenced by the cultural context, «And, as we shall see throughout this book, we now belong to the global society: the human community on earth»⁵⁰. It then analyses the affective-sexual identity related to biological sex, gender identity and sexual orientation. Although the issue of family patterns and personal sexual orientation are treated superficially, shunning embarrassing matters⁵¹, it serves as a pretext to criticize the subject of Education for Citizenship and Human Rights claiming that the textbooks included topics that only affect personal and family life so meeting the aims of the subject. Logically, all appeals that were filed in courts with this argument were rejected⁵².

This text defines negative discrimination as unfavourable treatment to persons or to specific groups regarding them as inferior to other beings⁵³. For this reason, «discrimination directly attacks the principle of equal dignity for all human beings, which is what provides the basis for a democratic conception of justice, and whose disregard results in the violation of many human rights»⁵⁴. Democracy is exercised in the country of which one is a citizen. However, this book makes constant reference to human rights, forgetting that these are set out in the Spanish Constitution of 1978 that advocates equality and expressly

⁴⁷ Pellicer Iborra, Ortega Delgado, *Educación para la ciudadanía*. ESO, cit., p. 55.

⁴⁸ T. Aguilar, A. Caballero, N. Dausà, J.V. Mestre, S. Vilaseca, *Educación para la ciudadanía*. ESO, Barcelona, Edebé, 2007, p. 16.

⁴⁹ *Ibid.*, pp. 70-85.

⁵⁰ F. Akhamlich Campos, *Jóvenes ciudadan@s*. *Educación para la ciudadanía y los Derechos Humanos*, Madrid, Pearson Alhambra, 2007, p. 10.

⁵¹ *Ibid.*, pp. 11-12.

⁵² González, *Ciudadanía, identidades complejas y cultura política en los manuales escolares andaluces de educación para la ciudadanía y los Derechos Humanos*, cit.

⁵³ *Ibid.*, p. 80.

⁵⁴ *Ibid.*

prohibits any form of discrimination⁵⁵. This textbook is about some of the forms of discrimination that have a strong historical tradition: discrimination against women, racism, discrimination on grounds of sexual orientation and religious options⁵⁶ and for economic reasons.

2.3. *Towards the acceptance of a plurality of citizen identities*

An egalitarian and politically responsible society requires civic education that knows and appreciates its institutions. Some textbooks, like those of the editorial SM, include a specific teaching unit, (9) on «Democracy»⁵⁷ analysing the structure and institutions of the democratic system. It is the last unit of the text and therefore probably will not be studied everywhere due to the shortage of time devoted to the subject: one or two hours per week depending on the region. It refers to different forms of participation and political organization; different models of citizen representation such as municipalities, autonomous communities, etc. are incorporated and it expressly mentions the pluralism of identities we are analysing: «The Spanish constitution establishes political pluralism as a way to ensure freedom and citizen participation»⁵⁸.

The teaching unit number 5, called «What makes a good citizen?»⁵⁹ is based on the emblematic trilogy of the French Revolution: the exercise of responsible freedom; equality based on constitutional law and which generates justice, and thirdly, a fraternity that leads to solidarity.

The Oxford Editorial⁶⁰ also dedicates a didactic unit (3) to «Democratic societies» in it, in which it reflects on the concept, development and conditions of democracy, the functioning of democratic states, the political system in Spain, the content of the 1978 Spanish Constitution, the Spain of autonomies, the relationship between tax revenues and public services and Spain in the context of the European Union. Speaking about representative democracy and the electoral system, it necessarily refers to political and trade union pluralism. It examines the plurality of autonomous communities with their statutes, flags, anthems, capitals, governments, courts, official gazettes, competences, tax collection, etc., a plural identity that does not appear in other texts or that just refers to the autonomy to which the student belongs. The decentralized autonomous state has produced a transformation comparable to a federalist

⁵⁵ *Spanish Constitution of 1978*, Art. 14.

⁵⁶ Akhamlich Campos, *Jóvenes ciudadan@s. Educación para la ciudadanía y los Derechos Humanos*, cit., pp. 81-91.

⁵⁷ Marina, *Educación para la ciudadanía*, cit., p. 156.

⁵⁸ *Ibid.*, p. 163.

⁵⁹ *Ibid.*, pp. 82-89.

⁶⁰ Amoedo Escribano, *Educación para la ciudadanía y los Derechos Humanos*, cit., pp. 36-53.

state. Analysing this teaching module, students reflect on political pluralism and as a citizen belonging to multiple entities and organizations through which they can channel their participation.

The publisher Anaya dedicates teaching units 9 and 10⁶¹ to the functioning of democratic life that allows it to articulate effectively citizens' political power through rules such as the principle of majority rule, respect for minorities, the principle of representation, respect for human rights, renunciation of the use of violence as a method for resolving disputes between citizens, tolerance for those who are and who think differently, willingness to negotiate, the prevalence of the common good over the individual, etc. It also develops the separation of powers and refers to the distribution of the state into three levels: the central government (Parliament and Government) that embodies State sovereignty; the regional level represented by the seventeen autonomous communities and the local level based on municipalities governed by the local authority⁶².

The Algaida Editorial, belonging to the Anaya group but with a different editorial line, believes that democracy is the system that creates the best conditions for a pluralistic, tolerant civic coexistence⁶³ and a permanent mechanism to build and rebuild the society in which we live⁶⁴. The teaching unit (3)⁶⁵ discusses, especially the foundations of democratic life and its problems, the principles of representation and participation and the promotion of responsible and participatory citizenship. Unit 7⁶⁶ «The Spanish constitutional and democratic system», develops the origin of the rule of law, the Spanish constitutionalism of the nineteenth and twentieth centuries, pausing especially at the 1978 Spanish Constitution as a guarantor of social and democratic rule of law. Article 1 holds legal freedom, justice, equality and political pluralism as superior values. Theoretically, the essential principles of the Spanish constitutional order are clear: parliamentary monarchy, a parliamentary system and a single, albeit decentralized state. It also includes other basic ideas as to what the social state is and the function of politics in serving citizenship.

Edebé unit 4 starts «I am a democrat»⁶⁷ with a picture of a page and a half showing a person voting at a polling station and making clear the relationship between democracy and participation. Then it asks the students to answer the question: «I am a citizen but where from?»⁶⁸ Other questions related to the municipality, region, state and the European Union then follow. The contents of this unit relate to the functioning of democratic states, the functions of major

⁶¹ Navarro Susaeta, Díaz Martínez, *Educación para la ciudadanía*, cit., pp. 88-107.

⁶² *Ibid.*, p. 101.

⁶³ D. Sánchez Rubio, R. Medina Martín, *Educación para la ciudadanía y los Derechos Humanos*, Sevilla, Algaida, 2007, p. 40.

⁶⁴ *Ibid.*, p. 41.

⁶⁵ *Ibid.*, pp. 38-49.

⁶⁶ *Ibid.*, pp. 96-110.

⁶⁷ Aguilar *et al.*, *Educación para la ciudadanía. ESO*, cit., pp. 54-68.

⁶⁸ *Ibid.*, p. 55.

national and supranational democratic institutions, the Spanish political model, public services and common goods highlighting the welfare state.

In general, we can say that the textbooks include enough content to make clear the functioning of a democratic state and what the pillars of Spanish democracy are: the Constitution, the separation of powers and national sovereignty and all that that implies.

2.4. *Prevalence of cosmopolitan citizenship*

However superficial it may be to analyse textbooks in this manner, we note that in all of them there is constant reference to being a citizen of the world based on human rights that derive from our personhood. This is the transverse axis that orients the concept of citizenship. Its universal perspective includes different cultures and ethnicities reflected in images and cultural topics with relative abundance.

The solution to conflict is through training in «a common ethical project, a great human project which is to find a way of life, organization, coexistence that allows us to be happy and live with dignity»⁶⁹. This same text often refers to various cultural realities such as India, China, etc. but not to the plurality of internal identities of a state or national political pluralism.

As already mentioned, the texts include an analysis of the functioning of democratic states, but overall the content and activities talk about human rights, the problems of a globalized and divided world, conflict and proposed solutions arising from the international organizations and institutions. They reject all forms of discrimination and injustice, proposing active citizenship that «can denounce violations of Human Rights, observe, speak out to defend a just cause, avoid possible further damage to the environment, and work as volunteers in an NGO etc. The actions of governments are important, but no less so are the actions and attitudes of each of us»⁷⁰. This seems consistent with the purposes of the subject, it seeks to train students in citizenship skills, but equally we consider it somewhat utopian and inefficient since such actions are not directed to channelling that participation into municipal and national institutions and agencies but to international ones⁷¹.

As seems obvious from the title of the subject, all textbooks devote at least one teaching unit to human rights: historical perspective, their conquest, the Universal Declaration of Human Rights, further development of human rights (second, third, fourth generation), some violations of human rights, etc. This

⁶⁹ Marina, *Educación para la ciudadanía*, cit., p. 18.

⁷⁰ Amoedo Escribano, *Educación para la ciudadanía y los Derechos Humanos*, cit., p. 93.

⁷¹ Pellicer Iborra, Ortega Delgado, *Educación para la ciudadanía. ESO*, cit., pp. 134-147; Navarro Susaeta, Díaz Martínez, *Educación para la ciudadanía*, cit., pp. 119-128.

is the case, for example, with Edebé in Unit 3,⁷² and Algaida in unit 4⁷³. Other publishers such as Santillana Proyecto Casa del Saber, SM, Anaya and Pearson, precisely the publishers with most national coverage, do not treat them in a specific unit but cosmopolitan citizenship predominately permeates all units. We also note that publishers in addition to analysing human rights specifically in several teaching units refer to them in other units⁷⁴.

It seems logical that a reference to human rights is made when the texts talk about issues that affect everyone: migration, ethnic diversity, multiculturalism, social discrimination, respect for differences, globalization, poverty, armed conflict, gender violence, environmental problems, child exploitation, NGO, etc. But these global references should be related to other similar problems that directly affect students.

Conclusions and results

If we were to weigh the criticism of textbooks, our overall conclusions would be pejorative rather than positive. This is so for several reasons: because like any proposal, these educational resources have shortcomings and defects; because they need to be adapted to each context; because those who analyse and publish their results are often academics who do not live day to day in schools and sometimes are not aware that teachers cannot every day make new material that students must use the next day; because they reflect a pedagogical behaviour that is easy to disagree with, etc. However, despite all these criticisms, the use of textbooks still remains the main way of teaching in infants, primary and secondary school classrooms.

Identities are constructed to the extent that individuals assimilate and internalize civil, political, social and cultural elements from different scenarios. One of the most used educational resources in schools is the textbook, hence the importance of analysing their contents.

With regard to the first hypothesis, it is clear from the study we have made that although the books do not analyse or make references to topics

⁷² Aguilar *et al.*, *Educación para la ciudadanía. ESO*, cit., pp. 38-53.

⁷³ Sánchez Rubio, Medina Martín, *Educación para la ciudadanía y los Derechos Humanos*, cit., pp. 50-65.

⁷⁴ Perea *et al.*, *Educación para la ciudadanía y los Derechos Humanos*, cit., pp. 64-90. Unidades 4 and 5; J.J. Ordoñez, C. Díez, J. Paredes, E.M. Peña, F. Muñoz, *Educación para la ciudadanía y los Derechos Humanos*, Madrid, Laberinto, 2008, pp. 72-17 (Prólogo de Victorino Mayoral). Unidades 5, 6 and 7; Entreculturas, *Educación para la ciudadanía*, Madrid, Anaya, 2007, pp. 33-70. Unidades 4 and 5. Sánchez Rubio, Medina Martín, *Educación para la ciudadanía y los Derechos Humanos*, cit.; Amoedo Escribano, *Educación para la ciudadanía y los Derechos Humanos*, cit., pp. 54-95.

that can generate controversy and confrontation in educational communities, teachers themselves could use some of their proposals to develop them, to show disagreement, generate debate and offer constructive criticism. The acceptance of multiple citizenship identities involves both the recognition of a plurality of ideologies and ethnicities such as participation in various areas in which multiple citizenship develops: municipal, regional or autonomous, national, European and universal. The defence of equality against any discrimination for personal or social reasons is an inalienable principle involving others like tolerance, respect, recognition or dialogue to find common ground. Sometimes, having a smaller personal impact, it is easier to develop a citizenship that is critical about problems that seem distant and typical of other nations such as the caste system, poverty, child labour, etc. rather than reflect on the closer problems of our environment. The citizen is born and is made. Even the reasons for the existence of political disaffection among much of the population should not exempt us from educating students in an inclusive, critical, pluralistic, reflective and participatory citizenship.

The knowledge of constitutional principles, the basis of the rule of law, democratic institutions and their functions are the pillars on which a civic education should be built. The textbooks analysed show the fundamental institutions of the Spanish democratic system; however, they deal more with an analysis of human rights and the problems affecting all mankind. This fosters the recognition of multiple ethnicities, plurality of views and contexts, but also requires an effort by teachers to show the students that the construction of multiple and inclusive identities are constructed personally in each environment.

Inclusive identities are incompatible with the concept of essentialist identities. The interdependence of cultures, nations or peoples is increasingly evident. The common good is not just the good of national citizens; on the contrary, it is becoming more generic and transnational while taking into account simultaneously specific minority groups and people. Active integration extends to everybody and is part of the process of the development of multiple, flexible and inclusive identities.

Modern states were constructed based on the ethnic, legal and political territorial unit. The internal hegemonic identity differed from the external which prevented the coexistence of the different, of the strange considered to be a risk that can rupture the unit. Today, the boundaries are blurred. We belong to a myriad of groups, movements and cultures; we express ourselves through multiple languages and idioms; we organize ourselves legally with different constitutions, treaties, statutes or regulations, all simultaneously and sometimes complementary. That is, we construct identities that are not mutually exclusive, nor closed, but heterogeneous, plural. Innerarity calls them identities with flexible, porous margins⁷⁵. However, it is difficult to participate

⁷⁵ D. Innerarity, *El nuevo espacio público*, Madrid, Espasa Calpe, 2006, p. 148.

in the construction of inclusive identities because their diversity requires recognition as a prerequisite. That has not happened, for example, national identities are deeply rooted and rebuild an identity of resistance in order to give meaning to people's lives, with the grave risk of turning into fundamentalism. Confrontation and subjugation of identities prevents collaboration on a project of a common future. When identities are respected and common objectives shared, collaboration is facilitated. Pluralism of identities is not a bad thing, but it is difficult to recognize it and we lack the ability to assess different identities and relativize our own.

Regarding the second hypothesis the very name of the subject, which expressly mentions Human Rights, and the editorial policies aimed at achieving greater market share have had a decisive influence on the development of textbooks. On the one hand, they foster a cosmopolitan citizenship over others (liberal, communitarian and republican) which do have these close national, regional / autonomous and municipal levels. Furthermore, they avoid any discussion that can generate an ideological conflict between members of any educational community. In this sense, it is easier to refer to tragedies that affect humanity as a whole such as worldwide hunger, conflict, exclusion of women or environmental pollution rather than in Spain, even though they are serious problems that directly affect Spanish citizens and which are available on studies published by the Centre for Sociological Research (CIS)⁷⁶. Currently, the surveys that have been conducted in 2014 have the following order of concern: unemployment, corruption and fraud, financial problems, concerns about the modus operandi of the political class, social issues (health and education), immigration, etc.

⁷⁶ Centro de Investigaciones Sociológicas (CIS): <<http://www.cis.es/cis/opencms/ES/index.html>> (accessed: November 20, 2014).

The slow nationalization of Greek education through history teaching in the 19th century

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ABSTRACT. This paper focuses on the obstacles that occurred in the process of nationalization of Greek education during the 19th century, particularly examining the case of history teaching. In these obstacles were included the limited school attendance, the rareness of history teaching in schools and the ineptitude of teachers, the operation of a large informal net of grammar schools (*grammatodidaskaleia*), the disordered and ineffective educational policy of the Greek state, the uncertainty about the very context of history which should be taught, and, lastly, the continuous and persistent derision of any Greek institution, idea or personality by Greeks themselves. Although these obstacles were undoubtedly responsible for a piecemeal historical awareness, nevertheless such a school impotence wasn't able to reduce the influence of national narratives on Greeks, which was passionately cultivated by mainly journalist discourses.

EET-TEE Keywords: Nationalization; Educational System; History Teaching; Greece; XIX Century.

Introduction

In the history of modernity the emergence of the nation into political consciousness, and political program too¹, is often connected to the French Revolutionary and the Napoleonic wars. Since then, the desire to match national and political boundaries along with liberalism, imperialism, and industrialization, has become one of the pivotal ideas of modernity, and though a secularized one, has tended to become a religion itself, even in the contemporary era of postmodernity.

¹ E. Gellner, *Nations and Nationalism*, Ithaca, N.Y., Cornell University Press, 1983, p. 1.

It is well acknowledged by historians, social scientists or educators, that one of the principal drives of nationalism is history/historiography. For instance, E.J. Hobsbawm was too confident that historians have played and are still playing a central role in the growth of nationalism, which projects the ideals of the 19th-century middle class society into a distant, glorious past: «Historians are to nationalism what poppy-growers in Pakistan are to the heroin-addicts: we supply the essential raw material for the market. Nations without a past are contradictions in terms. What makes a nation is the past, what justifies one nation against others is the past, and historians are the people who produce it»². Georg Iggers also pointed out that it was the 19th century which saw the togetherness of professionalization and nationalization of history: «Everywhere professional historians devoted themselves to inventing images of national history – in Germany, in France, in Great Britain, in Poland, in Bohemia, in the United States and later in Japan»³.

If then the cohesion between history and nationalism is completely accredited, the importance of nationalism in mass education, both in administration and curriculum, is also widely acknowledged. As mass education is not a neutral enterprise, history and its study at schools has been conceived not only as a crucial variable, but even more as a powerful instrument of nationalist ideology and its historical culture, as a political vehicle that achieves particular ends in each society. Apple and Christian-Smith have called textbooks as artefacts defining whose culture is taught in schools⁴, and it is E. Gellner who contends that «at the base of the modern social order stands not the executioner but the professor. Not the guillotine, but the (aptly named) doctorate d'état is the main tool and symbol of state power. The monopoly of legitimate education is now more important, more central than the monopoly of legitimate violence»⁵. It is also fully recognized that especially teaching history as well as studying history textbooks are considered to be tools of ideological management and indoctrination, and served to legitimize the nation-state as a given national unity, following the tradition of unbroken continuity. They are dynamic and high functional means intended to foster a feeling of belonging, to strengthen patriotism, to enhance the nationalist spirit throughout the youth in order to shape their national identity. Through them, children are catalytically imbued with potent images of national superiority and romanticist assumptions of the heroism of earlier generations, helping them to arouse their enthusiasm, pride,

² E.J. Hobsbawm, *Ethnicity and Nationalism in Europe Today*, «Anthropology Today», vol. 8, n. 1, 1992, p. 3.

³ G. Iggers, *The Historiography in the 20th century*, in G. Iggers, L. Wirth (edd.), *The misuse of history: Learning and Teaching about the History of Europe in the 20th Century*, Belgium, Council of Europe Publishing, 2000, p. 12.

⁴ M. Apple, L. Christian-Smith (edd.), *The Politics of the Textbook*, New York, Routledge, 1991, p. 1.

⁵ Gellner, *Nations and Nationalism*, cit., p. 34.

and loyalty to God, King, and fatherland, and construct a grand narrative characterized by unity, coherence and orientation, usually in parallel with negative visions of historical victimization.

The role of history curricula and textbooks in promotion and cultivation of nationalistic spirit is at present fully recognized. Charles Ingrao calls them as «Weapons of Mass Instruction», which «are part of a much broader legitimation process through which every society's ruling elite secures the uncritical acceptance of the existing political, social and economic system»⁶. Thus, nationalist teachers, believing that an indispensable factor in the formation of a nation is «forgetting history, or even getting history wrong» (Ernest Renan), usually avoid inconvenient facts, construct procrustean, simplistic and non-controversial narratives, make exhumations and reburials of the past that seem to fit well into national ideology, and usually interpret the failures of their fatherland as merely temporary episodes in a triumphant, uninterrupted process of its self-construction. Through history teaching the ultimate goal is to engender the pupils' passionate love of their country, to make them familiar with glorified narratives, memorable events and great personages in their own history and to foster affection and devotion to the governors and the state.

1. *The national question in Greece during the 19th century*

It is certainly out of any reasonable assumption that history teaching in Greek schools in post-revolutionary era (1830-1900) could be under a post-modern pluralistic, multinational view. The extremely bloody Greek-Ottoman war was a nearby reality in people's bodies and minds. It was present in their personal and collective memory⁷, and also in the ruins all around. Moreover, national and local newspapers always created and reinforced an anti-ottoman stance by reporting various rumours of repeated Ottoman violence against Greeks in the non-yet-liberated regions of Macedonia, Thessaly or Epirus. Despite of a active net of commercial and economic relations that had been constructed between Greeks and Ottomans (either Christians or Muslims) during that era, a common

⁶ Ch. Ingrao, *Weapons of Mass Instruction: Schoolbooks and Democratization in Multiethnic Central Europe*, «Journal of Educational Media, Memory, and Society», vol. 1, n. 1, 2009, pp. 180-189.

⁷ It is not surprising that Constantine Paparrigopoulos (1815-1891), founder of Modern Greek historiography, who first promoted the concept of historical continuity of Greece from antiquity to the present, was himself a victim of Turkish violence during the Greek War of Independence. His father was killed in Constantinople, and before his eyes his brother and two uncles of him were also executed (1821). Paparrigopoulos and his mother barely survived the slaughters and fled to Odessa.

heritage between Greeks and Ottomans was obviously an unnatural dream: to put their past behind was a mere utopia.

The newly created Greek state, which obtained its independence out of the multi-ethnic and multi-linguistic Ottoman Empire, was the first Western nation-state crystallized in the Balkan Peninsula. It was also the first one with a considerable national homogeneity, and also the forerunner of the Greek irredentism (expressed in *Megali Idea*, the «Great Idea»). From the beginning it had the explicit goal of establishing a greater Greek state that would encompass the Ottoman places in Europe and Asia Minor where massive Greek populations already existed. Although the creator of the Greek «Great Idea» is supposed to be the first prime-minister of Greece, Ioannis Colletis (1844-1847), the impulse of irredentism could be dated soon after the Fall of Constantinople, reflected in legends, folk sayings and prophecies, or in many unsuccessful revolts too. However, Rigas Velestinlis (1757-1798), who aroused the patriotic sentiments of Greeks and «preached the gospel of revolution in the Balkans»⁸ by the means of his enthusiastic poems and books, can be considered as the apostle of the Greek Revolution. In any case, Greek domestic politics as well as foreign relations in the 19th century were dominated by the national question, which also provoked several but failed rebellions against Ottomans in Thessaly, Macedonia and Crete. The first king of Greece, the Bavarian Otto, was under the influence of Colletis when wholeheartedly espoused the idea of reviving the Byzantine Empire in the 19th century, and the second king, the originally Danish prince George I, accepted readily the title “*King of the Hellenes*”, which implicitly referred to the irredentist claims of Greeks. At last, it was the University of Athens, founded in 1837, which «was seen as the power house of the attempt to ‘re-Hellenise’ the unredeemed Greek populations of the Ottoman Empire»⁹. In the span of the 19th century the vision and rhetoric of nationalism appealed indeed to the vast majority of Greeks, yet it was eroded and often scorned by the repeated failures of national aspirations in the Crimean War (1853-1856), the Cretan Rebellion (1866-1869), the Eastern Crisis (1875-1878), or the «unfortunate» Greek-Turkish War (1897). The reasons for such Greek self-derision were the strong opposition of the Great Powers, the constant unpreparedness and confusion of troops and governments, and also the dishonesty of Great Idea’s fierce advocates, who succumbed to the biased, demagogic and manipulative use of it. Therefore, the Great Idea would be easily translated to «general leprosy», «malevolent phantom», «satanic catchword of the present government», or «the great charlatanism»¹⁰, losing occasionally its revolutionary and heroic character.

⁸ R. Clogg, *A Concise History of Greece*, New York, Cambridge University Press, 2013, p. 29.

⁹ *Ibid.*, p. 49.

¹⁰ E. Skopetea, “*To Prototypos Vasileio*” kai ē *Megalē Idea*. *Opseis tou ethnikou provlēmatis stēn Ellada (1830-1888)* [“The Ideal Kingdom” and the Great Idea. Aspects of the national problem in Greece (1830-1880)], Thessaloniki, Polytypo, 1988 (in Greek), pp. 289, 348, 349, 350.

2. *The Greek educational system*

In order to scrutinize even more the nationalist climate in Greece during that century, one should examine if schooling did play a significant role in cultivating the national sentiments. The foundations of the Neo-Hellenic public educational system were actually laid during the Bavarian Regency period and the first years of Otto's Reign in the throne of Greece (1833-1837). Bavarians had to build a new country almost from scratch, particularly after the period of anarchy following the assassination of the first Greek governor Ioannis Kapodistrias (1831). Education was then one of the top Bavarian priorities for they were eager to school their population as soon as possible in order to cover the need for educated executives and set up their bureaucratic machinery. After Prussia (1763) and Denmark (1814), Greece was the third country in Europe that introduced mass education. The organization of elementary (1834) and secondary education (1836) and the foundation of the University of Athens (1837) were the result of three decisive educational acts of the Greek state, inspired and patterned on French as well as Bavarian models¹¹. Therefore, the structure of the system was constituted of a seven-year Elementary school, a three-year Hellenic school, a four-year secondary school (following the German model of *Lateinische Schule* and *Gymnasium*), and, at last, a University, which for many decades included four faculties: Law, Theology, Philosophy (including Mathematics) and Medicine.

The elementary school was the unique compulsory stage of the Greek educational system. «All children between the ages of five and twelve are required to attend these schools, under a penalty of ten lepta (the tenth of a drachma) on the parent of each child for each day's absence», although the penalty was seldom put in force, notes an early observer of Greece¹². Achieving basic literacy and numeracy skills among all Greek pupils, namely the famous “*Three Rs*” [reading, (w)riting and (a)rithmetic], was the principal goal of elementary schooling. Yet, the subjects which were scheduled to be taught in these schools were much more than pure literacy and numeracy, and they included:

(1) Sacred history and catechism; (2) Reading and writing in modern Greek; (3) Arithmetic, with the common weights, measures, and money scales; (4) Practical illustration of geometrical figures; (5) Elementary geography, and especially the geography of Greece and

¹¹ Ch. Charitos, *O idritikos nomos gia ta Demotika sxoleia. Gallikes kai Germanikes epidraseis. Symbole stin istoria ton ekpaideutikon thesmon* [The Constitutive Act of Elementary schools. French and German influences. Contribution to the history of educational institutions], Volos, Zesematos, 2010 (in Greek).

¹² L. Sergeant, *Greece in the nineteenth century; a record of Hellenic emancipation and progress: 1821-1897*, London, Fisher and Unwin, 1897, p. 170.

-the Hellenic countries, (6) Elementary history, and especially the history of Greece; (7) Elementary geology, mineralogy, and botany; (8) Anthropology; (9) Elementary physics, with some practical instruction in agriculture and horticulture; (10) Linear drawing; (n) Vocal music; (12) Gymnastics¹³.

Nevertheless, these twelve school subjects were rarely taught in Greek elementary schools during the 19th century. Following the method of Lancasterian or mutual instruction (until 1880), most teachers, especially in villages or small towns, were devoted to teach their pupils only the *Three Rs*, due to various reasons, such as their own impotence, their indifference, the multitude of pupils or the shortage of time. In the Hellenic schools and Gymnasiums the situation was slightly better. Nevertheless, repeated complaints were also forwarded to the government and the Parliament, or found their place in the press, respecting the bad school buildings, the indifference or dishonesty of teachers, the disorganized character of secondary education, etc.¹⁴

The system was scheduled to have a highly centralized and bureaucratic administrative structure completely controlled by the Ministry of Education and Religious Affairs, an excessive moral, theoretical and classical orientation in the curricula at the expense of practical training, and an expressed purpose to promote uniformity all over the country. Moreover, the Greek educational system followed a linear evolution and the main aim of the Elementary school was to prepare students for the Hellenic, the last basically functioned as a preparatory school for the Gymnasium, and the Gymnasium for the University.

The Greek state took early upon itself the right of training and appointing the teachers of its schools. Thus, while the teachers of the Gymnasium were instructed in the University, the education of male teachers of elementary and Hellenic schools was provided by *Didaskalion*, which was founded in 1834, closed in 1864 due to its ineffectiveness to offer a suitable training, yet was re-established in 1878. New ones were also founded in Tripolis (1880), Corfu (1880) and Larissa (1882). On the other hand, the education of female teachers was mainly provided by the Teaching Training School of the *Philekpedephtiki Etaireia* (Pro-educational Society), a private establishment founded in 1837 in Athens, as well as by other private institutions, run usually by protestant missionaries in Athens and Syros, or, rarely, by municipalities (Syros)¹⁵.

The legislative framework of elementary education continued with slight modifications until 1895, while the secondary one remained almost untouched

¹³ *Ibid.*, pp. 170-171.

¹⁴ Al. Dimaras (ed.), *I metarruthmisi pou den egine* [The reformation which was not brought about], Vol. A: 1821-1894, Athens, Hermes, 1974 (in Greek), pp. 215, 261, 287-288.

¹⁵ A.L. Smyrniaios, *Sta ichne tis utopias: To 'Philelleniko Paidagogeio tis Syrou kai e protestantiki omogenopoiesi tis oikoumenes kata to 19o aiona* [In the traces of utopia: The Philhellenic Pedagogion of Syros and the protestant homogenization of the world during the 19th century], Athens, SOV, 2006 (in Greek).

until 1929, and thus were often criticized as unable to meet the country's ever-growing educational needs.

3. *Teaching history in Greek schools*

Although history as a school subject was not included in the curricula of various Greek educational institutes established in Ottoman Empire before the outbreak of the Greek Revolution (1821), nevertheless historiography was part of the language lessons based mainly on ancient Greek texts¹⁶. During the period of the so-called *Neohellenic Enlightenment* (1770-1821)¹⁷, history books were considered to be important components of historical culture, especially in the indoctrination of children for nation-state building, so much as D.A. Zakythinios acknowledged that the historical spirit of the time played a pivotal role in preparing for the Greek War of Independence¹⁸. Yet, although Daniel Filippides (1750-1832), «one of the most learned writers of modern Greece»¹⁹, wrote in the introduction of his book *History of Romania* that «He who ignores the history and geography of his fatherland is the infant of the fatherland»²⁰, another scholar, George Paliouritis, lamented that «in our schools history teaching is completely neglected and almost ostracized»²¹.

After the constitution of the new Greek state history was scheduled to be taught in Elementary schools, the Hellenic ones, and the Gymnasiums. While in elementary schools «the principles of history should be taught if it was possible»²², in Hellenic schools and in the Gymnasiums history was taught two

¹⁶ K.Th. Dimaras, *Constantine Paparigopoulos. He epoche tou-He zoe tou-To ergo tou* [Constantine Paparigopoulos. His Time. His Life. His Work], Athens, Cultural Foundation of the National Bank of Greece, 1986 (in Greek), p. 32.

¹⁷ *Neohellenic Enlightenment* is a term coined by K.Th. Dimaras, one of the most important modern Greek thinkers of the 20th century and the scholar of Modern Greek Enlightenment par excellence, in order to confine the period between 1770 to 1821 where a considerable Greek educational regeneration took place in the Southeastern Europe and the Near East. See K.Th. Dimaras, *Neoellinikos Diaphotismos* [Modern Greek Enlightenment], Athens, Hermes, 1977 (in Greek).

¹⁸ D.A. Zakythinios, *Metavyzantina kai Nea Ellinika* [Post Byzantine and Modern Greek], Athens, 1978 (in Greek), p. 24.

¹⁹ *The Monthly Review, from September to December inclusive, 1827*, London 1827, vol. II, p. 435.

²⁰ D. Filippides, *Istoria tīs Roumounias...* [History of Romania...], Leipzig, en te typographia tou Taouschnitz, 1816 (in Greek).

²¹ G. Paliouritis, *Epitomi Istorias tis Ellados* [A Concise History of Greece], Venice, para Nikolao Glykei to eks Ioanninon, 1807 (in Greek), p. XIX.

²² Ch. Koulouri, *Istoria kai Geografia sta ellinika scholeia (1834-1914). Gnostiko Antikeimeno kai Ideologikes Proektaseis* [History and Geography in Greek schools, 1834-1914. Cognitive object and ideological implications: Anthology of texts: Bibliography of textbooks], Athens, Historical Record of Greek Youth, GSY, 1988 (in Greek), p. 91.

hours per week (in the second case along with Geography)²³, while the whole 19th century the number of hours in these types of schools was between two and three per week²⁴. Yet, with the introduction of the subject of *New Greek* in the Hellenic schools (1884) most of the selected passages were from the Modern Greek History²⁵.

It is well documented that the most common way in writing a history (or geography) textbook from 1834 until almost the end of the 19th century was the translation of a foreign textbook (English, German or French) and later the copying of excerpts from older manuals or books which were not intended for educational purposes²⁶. Manuals as William Mitford's, *Ancient Greek History for use in Schools* (1836), Thomas Keightly's, *History of Ancient Greece for Use in Schools* (1850) and *History of Greece* (1849), Oliver Goldsmith's, *Dr. Goldsmith's History of Greece, Abridged for the use of Schools* (1849), and, at last, J.R. Lame-Faleury's, *L'Histoire Grecque Racontée aux Enfants* (1860), were among those which usually used by Greek teachers for their instruction²⁷. The use of these translations extended far into the 19th century, when began to be disputed during the 1880s due to their «coldness» and «foreignness» in description and the asymmetrical emphasis on European history rather than the Greek one²⁸.

4. *The slow nationalization of Greek youth through history teaching*

Although the nationalistic spirit was prevailing throughout Greek society, it seems difficult enough to consider history teaching in elementary and other schools of the time as a strong and decisive vehicle of national ideology. Certainly, that would be the case in the late 19th century, when nationalism began to reach its hallmark in Europe as well as in Greece, but such a considerable change was caused only by an actually slow process. School environment, state will and regulations, social relations, and general spiritual climate, all created rather unfavorable conditions for the pupils' nationalistic indoctrination.

The first reason for such impotence was the limited school attendance, although compulsory elementary schooling was the main form of education

²³ Dimaras, *I metarruthmisi pou den egine*, cit., p. 66.

²⁴ *Ibid.*, pp. 255, 267.

²⁵ *Ibid.*, pp. 256-260.

²⁶ Koulouri, *Istoria kai Geografia sta ellinika scholeia*, cit., pp. 23-24.

²⁷ Th. Zervas, *Continuity and change in the Greek history textbook: Comparing Greek history textbooks from 1834-1880*, «Paper presented at the annual meeting of the 55th Annual Conference of the Comparative and International Education Society», Fairmont Le Reine Elizabeth, Montreal, Quebec, Canada, 2011.

²⁸ Koulouri, *Istoria kai Geografia sta ellinika scholeia*, cit., p. 24.

received by the majority of Greek pupils, and it is also argued that the diffusion of education in Greece was relatively early at least in comparison to other European countries²⁹. The low appeal of education for young pupils was reflected for many years by static numbers of students as well as by their percentage in regard to the total number of pupils. Thus, in 1830, when the number of elementary schools was 71, the number of pupils enrolled in them was 6,000, that is, only 8% of the total of young people eligible for primary education. Near the end of the Ottonian era (1860) that percentage reached at 30%, and, although school attendance and, consequently, literacy was significantly extended in the late nineteenth century, the percentage of pupils reached only at 63% of the total children population engaged in elementary education in 1901³⁰. In 1883 the inspector of elementary schools in Corfu reported that only one to ten boys were enrolled in schools, while none of the girls received any kind of education in the island³¹. At last, it is also significant to note that according to the 1879 census, a large percentage of men (69, 20%) and nearly all women (92,96%) were illiterate, when in 1907 the percentage decreased to 50,20% and 82,55% respectively³².

Secondly, there is ample evidence that history teaching in elementary schools was rare, if any, while in secondary schools it was rather imperfect based exclusively on rote learning. In 1828 French Philhellene Henri-Auguste Dutrône had noted that the percentage of schools that had introduced history teaching had increased from one-third before the Greek revolution to two-thirds during it, and, lastly, three-fourths just after it³³. Yet, such an optimistic view collapsed when two years later (1830) an official report of the General Inspector of Greek schools J. Kokkonis to the Governor J. Kapodistrias stated that in the Lancastrian schools of Peloponnesus (Morea) neither history nor geography were taught, while these subjects were taught in only two of the nineteenth Hellenic schools of the same area³⁴. The same deficiency was observed also in the Gymnasium of Naples, when neither history nor geography were taught in 1839 and 1843 as a result of the students' disturbances and also due to the «most unavailing method of teaching»³⁵. In 1855 a member of the Parliament

²⁹ Konstantinos Tsoukalas, *Eksartese kai anaparagoge. O Koinonikos rolos ton ekpaideutikon mechanismon sten Ellada (1830-1922)* [Dependence and Reproduction. The social Role of Education Mechanisms in Greece 1830-1922], Athens, Themelio, 1992 (in Greek), p. 395.

³⁰ Tsoukalas, *Eksartese kai anaparagoge. O Koinonikos rolos ton ekpaideutikon mechanismon sten Ellada (1830-1922)*, cit., p. 392, and S. Bouzakis, *Modern Education in Greece 1821-1985*, Athens, Gutenberg, 1987 (in Greek), p. 36.

³¹ Dimaras, *I metarruthmisi pou den egine*, cit., p. 247.

³² Tsoukalas, *Eksartese kai anaparagoge. O Koinonikos rolos ton ekpaideutikon mechanismon sten Ellada (1830-1922)*, cit., p. 393.

³³ Koulouri, *Istoria kai Geografia sta ellinika scholeia*, cit., p. 16.

³⁴ *Ibid.*

³⁵ *Ibid.*, p. 20.

lamented that «history... had excluded from our Gymnasiums»³⁶. Furthermore, we have evidence that teachers often used not manuals but manuscripts in order to instruct their pupils either in elementary or in secondary schools³⁷. Another commentator also complained that pupils in Gymnasiums were taught only two or three chapters of General History during the whole school year³⁸. In 1873 the Greek teacher and publisher K. Ksanthopoulos in his book entitled *Primary and Secondary Education* considered the large deficiency of history (and Geography) teaching in Greek schools as a result of the inherently demanding character of it as well as its delayed introduction at schools³⁹. The director of the Teaching Training School of Athens Ch. Papamarkou (1885) also insisted on the fact that the most common method of teaching history was the reading and dictation from the notebooks of the ignorant teachers in front of boring and yawning pupils, a sad condition which was responsible for the pupils' lack of the proper zeal for their fatherland⁴⁰. At last, I. Pantazides, the first professor of Pedagogy in the University of Athens, stated in 1889 that history teaching, though it was introduced in Greek education following the German model, «was always conceived as a kind of sideline business», depending exclusively upon the skill of teachers and the enthusiasm of some pupils⁴¹.

In addition, though centralized, the Greek educational system did not hold the monopoly of education of Greek youth. In parallel with the state sponsored schools there was an informal net of grammar schools, in the name of *grammatodidaskaleia*, which continued the old tradition of Greek «common schools» during the Ottoman era⁴². In these schools, priests, monks, greengrocers or housekeepers, taught children only the fundamental *three R's*, yet not by the Lancastrian method and on modern manuals, but on the basis of old religious books used in Orthodox liturgy, such as the *Psalter*, the *Oktoechos*, the *Horologion*, the *Euchologion*, and, certainly, the Gospels. In fact, we don't have much information about that outside state control schooling. Yet, it is possible that these schools sustained the old tradition because the formal system had not extend effectively in small, outermost regions due mainly to financial reasons, and, moreover, because teachers and parents did not trust in modern teaching methods, which had been introduced from the “heretical Francs” (Bavarians, English or French). Particularly, Lancastrian system was used by protestant

³⁶ Dimaras, *I metarruthmisi pou den egine*, cit., p. 131.

³⁷ Koulouri, *Istoria kai Geografia sta ellinika scholeia*, cit., p. 23.

³⁸ Dimaras, *I metarruthmisi pou den egine*, cit., p. 302.

³⁹ Koulouri, *Istoria kai Geografia sta ellinika scholeia*, cit., p. 232.

⁴⁰ *Ibid.*, p. 297.

⁴¹ *Ibid.*, p. 355.

⁴² Ang. Skarvele-Nikolopoulou, *Ta mathemataria ton Hellenikon scholeion tes Tourkokratias: didaskomena keimena, scholika programmata, didaktikes methodoi: symvole sten historia tes Neellenikes paideias* [Greek handwritten school books during the Ottoman occupation: texts taught, school programmes, teaching methods: a contribution to the history of Modern Greek education], Athens, SOV, 1989 (in Greek), p. 176.

missionaries in their schools in Greece and Asia Minor and had been condemned by the Ecumenical Patriarchate for being an instrument of protestant proselytism in the era of Southeastern Europe and Near East. Anyway, Greek state made many efforts to systematize the provision of formal education in the span of the nineteenth century and, therefore, put under government control those schools. Nevertheless, it was pointed out almost futile, for seventy years after the construction of the Greek state (1890) there were 1,141 *grammatodidaskaleia*, and even in 1908 1,571 ones, all over the country⁴³. It is rather possible that very little, if not, historical education was provided there.

Another reason why the educational system was incompetent to train in nationalism the Greek youth was the very educational policy of the Greek state, as, certainly, every other policy in Greece at the time. Successive governments took often a disordered and ineffective approach to educational issues. The great lack of coordination in the planning and implementation of educational activities was also reinforced by the frequent change of the political leadership of education (between 1832 and 1882 sixty persons served as Ministers for Education for seventy-seven times!), the permanent shortage of financial resources, the hasty and ill-informed assessment of the situation, the furious insistence on uniformity in trivial matters, the plethora of textbooks for profit-making ends, the closeness of the very Teaching Training School for fourteen years, the lack of political will, and the stable crisis of confidence between leadership and people. These problems frequently led to a pessimistic view that there was «a total absence of a common Greek national education», that the expansion of State education was in fact minimum, when, for instance, the Albanese language was widely spoken in the very districts of Athens (1866), and that the prevailing superficiality of knowledge between almost all social classes was the main cause of the «unhealthy character of Greek State»⁴⁴. Consequently, the deep chasm between words and deeds, legislative intentions and actual results, in educational policy left very little space for a proper national history education. Anthony Fatcheas, a progressive mathematician, recognized in 1856 that only «the politically impotent» persons, that is, only who were not able to become doctors, lawyers, or generals, entered the teaching profession⁴⁵. In 1872, D. Mavrogordatos, who was later to become Minister of Education, also stated that «the present state of our elementary schools leaves the nation without education...», while Hellenic schools and Gymnasiums «push the nation to a superficial knowledge»⁴⁶. The paper *Eon* (Age) stated that the sad situation of schools was the natural result of State's carelessness, and also lamented that

⁴³ Chr. Lefas, *Istoria tis Ekpaideuseos* [History of Education], Athens, OESB, 1942 (in Greek), p. 180, and Bouzakis, *Modern Education in Greece 1821-1985*, cit., p. 50.

⁴⁴ Skopetea, "To Prototylo Vasileio" kai ē Megalē Idea. *Opseis tou ethnīkou provlēmatos stēn Ellada (1830-1888)*, cit., pp. 135-158.

⁴⁵ *Ibid.*, p. 138.

⁴⁶ *Ibid.*, p. 212.

in the Vienna International Exhibition (1873), while Turkey and Vlachia took many prizes and medals, Greece did not take even a lower prize⁴⁷. The results of the General Inspection of Primary Schools in 1879 were very discouraging in such an extent that A. Avgerinos, Minister of Education, was obliged to punish 145 teachers (out of 580). Besides, the final report insisted on the ineptitude of most of the teachers to teach even according to the old Lancastrian method, on the small percentage of children who were taught at the schools, and on the misery and unsuitableness of school buildings⁴⁸. The above Report stressed particularly on the collapse of religious sentiments as well as national morales due to the commitment of teachers and pupils in rote learning, a really stable characteristic of Greek education⁴⁹. N. Politis, founder of Folklore Studies in Greece, was extremely disappointed by the deplorable condition of elementary schools in Volos district, which inspected in 1883. He reported that there were pupils who didn't know the very name of their nation, and teaching history was limited by rote learning of some passages from the Irving's history book, while none of those teachers taught anything about «the glorious years of Greece, the Greeks under the Ottoman rule, or the Greek Revolution»⁵⁰. In a circular of the General Inspector of Elementary Schools (1888) teachers were accused of being indifferent and callous, often leaving their schools and going out to coffee or wine shops⁵¹. Finally, G. Theotokes, Minister of Education, submitting his educational bills in 1889, declared «with deepest pain in soul» that «elementary education did not exist in Greece since the state constitution». Each teacher was teaching «whatever, however, as much as, and whenever he wanted...»⁵². Yet, almost all commentators suggested that Greek teachers were not exclusively responsible for such a terrible education, nevertheless, there was no doubt that schooling in Greece was in most cases hateful and unbearable both to pupils and teachers. The former always suffered from the strictness and even the brutality of the latter to such an extent that school was usually described as a place of martyrdom for the little children, where terror and animosity prevailed⁵³. Poor and improper training of the teachers along with an incomprehensible language they had to teach, which much resembled to the ancient Greek (the so-called *kathareousa*, or the «purifying form of language»⁵⁴), the inflexible, mechanical, and authoritarian procedures of learning in Lancastrian method, the shortage

⁴⁷ *Ibid.*, p. 217.

⁴⁸ *Efemeris ton Syzítiseon tis Voulis* [Gazette of Parliamentary Debates], 8th Period, Session A, Appendix, 1880, pp. 436-450.

⁴⁹ Koulouri, *Istoria kai Geografia sta ellinika scholeia*, cit., p. 243.

⁵⁰ Dimaras, *I metarruthmisi pou den egine*, cit., p. 249.

⁵¹ *Ibid.*, pp. 272-273.

⁵² S. Tzoumelea, P. Panagopoulou, *H Ekpaideusi mas sta teleftaia 100 xronia* [Our Education during the last 100 years], Athens, Demetrakou, 1933, p. 57, and Lefas, *Istoria tis Ekpaideuseos*, cit., pp. 162-164.

⁵³ Tzoumelea, Panagopoulou, *H Ekpaideusi mas sta teleftaia 100 xronia*, cit., pp. 40-46.

⁵⁴ Clogg, *A Concise History of Greece*, cit., p. 49.

of school buildings or their extreme dirtiness, provided in fact the view of a rather deplorable schooling. Yet teachers suffered likewise from poverty, their continuous transfer from one place to another according to the frequent political changes (they were often called as *teachers-Pausanias*)⁵⁵, while they were always subjected to myriad humiliations, jeering and menaces from men in power and even the parents⁵⁶. It seems therefore that school climate was discouraging and totally negative for any kind of effective indoctrination, either religious or national.

Furthermore, the nationalization of Greek youth was also impeded by the uncertainty about the very context of history taught in schools. «The first official imagination of Greek history in the aftermath of the war of liberation in 1821»⁵⁷ was expressed by Constantine Schinas, the first rector of the University of Athens (1837), who, among Macedonians, Romans, and Turks, included Byzantines into the conquerors of Greece, following the historiographical views of European Enlightenment (E. Gibbon). Therefore, until the 1870s only the ancient Greek history was taught⁵⁸. However, in the 1830s a serious challenge to the Greek self-integrity occurred, when the German historian Jakob Philipp Fallmerayer claimed that «there is not a single drop of undiluted Hellenic blood flowing in the veins of the Christian population of present-day Greece»⁵⁹. It provoked vehement reactions and fuelled the historical zeal of Greek scholars, and European Philhellenes too, to evidence the racial, or, at least, the cultural diachronia of the Greek nation from antiquity down to the residents of the nineteenth century's Greek state. The study of Greek past as a whole through the passage of time became an unquestionable national duty. Thus, the scholar Sp. Zampelios and the founder of Greek national historiography Con. Paparrigopoulos tried to fill the chasm. They introduced in the middle of the century the tripartite scheme of Greek historical periods (ancient, medieval, and modern), incorporating eleven centuries of Byzantine history within the broader framework of Greek history. The view of classic Greek heritage as cultural capital, derived out of the period of Ottoman rule, was to be completed in order to justify Greece's prominence on the European scene during the 19th century, the very «age of history». Yet, although these scholars began slowly to modify the self-image of Greek people, Byzantine history itself was introduced into Greek schools only in the 1880s. On the other hand, Modern Greek history, which was not taught during the period of Otto

⁵⁵ Tzoumelea, Panagopoulou, *H Ekpaideusi mas sta teleftaia 100 xronia*, cit., p. 38.

⁵⁶ *Ibid.*, pp. 26-27.

⁵⁷ A. Liakos, *Hellenism and the Making of Modern Greece: Time, Language, Space*, in K. Zacharia (ed.), *Hellenisms: Culture, Identity, and Ethnicity from Antiquity to Modernity*, London, Ashgate, 2008, p. 204.

⁵⁸ Koulouri, *Istoria kai Geografia sta ellinika scholeia*, cit., pp. 44-47.

⁵⁹ J.Ph. Fallmerayer, *Geschichte der Halbinsel Morea während des Mittelalters* [History of the Morea peninsula during the Middle Ages], Stuttgart und Tübingen, J.G. Cotta'schen Buchhandlung, 1830, p. IV.

Reign (1833-1863) due to the prevailing love of antiquity and the proximity to the revolutionary events, also introduced by Paparrigopoulos in his *History of the Greek Nation* (1853). Nevertheless, manuals respecting the history of the Greek Revolution began to circulate in schools only to some extent in the late 1860s. Another contradiction that much influenced the state decision of «what kind of history should be taught at schools and why?» was between sacred and secular one, which, certainly, convey «a contradictory historical logic», and seem to prevail during the 19th century⁶⁰. Finally, the first directives concerning history teaching in primary schools, written by D. Petrides, a General Inspector of Greek Schools, published only in 1881⁶¹. It is obvious, therefore, that such a growing trend of stretching the Greek historical boundaries from exclusively ancient to Byzantine and modern, and the ambiguity between sacred and secular history, indicate rather the consolidation of vagueness and uncertainty over the Greek national history, and, consequently, the difficulty of indoctrinating a national identity to children based particularly on history teaching up to 1880s.

Last but not least, another aspect of the failure in nationalistic indoctrination of pupils may be based on the continuous and persistent derision of any Greek institution, idea or personality by Greeks themselves, expressed particularly in national and local papers, or pamphlets. They lacked a strong institutional attachment to the state, church, education, and justice. They also lacked an undisputable feeling of trust to even the national visions, as well as to ministers, priests, or scholars, a feeling incapable to generate collective identification with the political system, or to serve as a dynamic foundation for a national identity. Greeks considered the institutions founded by Bavarians (they often called them *barbarians* due to their authoritarian governance) as foreign, or even hostile establishments: the king, the army, and the government were imposed on their country, they served only as arbitrators by often coerced agreement of the parties and people, so all of their establishments were or would be dangerous to the traditional setting. A series of revolts broken out in Mani, Messenia and Arcadia (1834) in Aetolia and Acarnania (1836) in Eastern Central Greece (1847-1848), and, certainly, in the rebellion of 1843, when Otto was forced to grant a constitution, are indicative of the public dissatisfaction with Bavarians and the king. Otto, moreover, was neither Orthodox nor was ever baptized into the Greek Church, and his marriage with Duchess Amelie of Oldenburg did not produce an heir, factors which made the emotional attachment between himself and his people less strong. Therefore, the sarcasm to the power was one of the daily activities of Greek people, who mercilessly parodied the dreams, the impotence or ineffectiveness of their leadership, indicating that satire was an

⁶⁰ M. Repoussi, *Iera kai therathen istoria: semainomena kai antifaseis tis istorikis ekpaideusis stin Ellada tou 19ou aiona* [Sacred and secular history: signifieds and contradictions of historical education in Greece during the 19th century], «Istor», n. 14, 2004 (in Greek), pp. 69-105.

⁶¹ Koulouri, *Istoria kai Geografia sta ellinika scholeia*, cit., pp. 263-267.

integral element of the Greek culture since Aristophanes' era. Additionally, such attitude was paradoxically coupled by a strong and also persistent feeling of desperation, which seems to be «one of the most prevailing discursive habits in the Greek world»⁶² at the time. Thus, great expectations, extravagant ambitions and dreams, or, on the opposite, cruel revenge's sentiments, recurrently alternated with self-criticism, and, even more, great disillusion, frustration, acedia, inconstancy, meaninglessness, and apathy, which was often termed as «the Greek disease»⁶³. Consequently, the tension between nationalism and localism was salient and, for the first decades after the Revolution, almost unredeemable. Thus, the imposing of nationalism by the power, which was continually mocked by its people, was predictably ineffective.

Conclusion

Education in Greece during the whole 19th century was thoroughly unsatisfactory. All studies concerning that period stressed on the grievous conditions respecting teachers, pupils, buildings, methods, textbooks, and state legislation about schooling. Therefore, history teaching did not remain unaffected by that general dysfunction of public education.

It may be stated that in the span of the nineteenth century the course of nationalism in Greece started with the victorious War of Independence (1821-1830) and, after a series of constant bloody failures and disappointments of nation to fulfill its aspirations against Ottoman Empire, reached its hallmark at the last defeat of Greek troops occurred in the war of 1897. Then, the intervention of Great Powers forced Greece to accept a humiliated armistice, which in turn caused the postponement of the *Great Idea*. However, in those seventy years, Europeans compensated Greeks by the ceding of Ionian Islands (1864) as well as Thessaly and a part of Epirus (1881), and the establishment of an autonomous Cretan State under Ottoman suzerainty. Nevertheless, this national narration of successive failures and European rewards did not mirror at the subject of history taught in the schools, where all the unfavourable conditions targeted towards the catastrophe of pupils' national indoctrination. What should be noted is that, as any other brainwashing, it needs a charismatic instructor, who works under advantageous conditions, and follows a dynamic and methodical programming of stages through which such indoctrination would be effected. Yet, quite the opposite happened in the Greek case: schooling, and particularly history teaching, was provided in unsuitable buildings by untrained, or ill-trained, teachers, who had a dreadful, vindictive relationship with their students,

⁶² Skopetea, "To *Protypo Vasileio*" kai ē *Megalē Idea*, cit., p. 233.

⁶³ *Ibid.*, p. 237.

used, if not, inappropriate textbooks, and adhered to the Lancastrian Method of authoritative and mechanical rote learning. The shortcomings of such a teaching were in fact predictable in the very process of indoctrination. Thus, although the climate of the Greek society was generally oriented to the fulfilment of national aims, the very instrument of such a goal, that is schooling and, particularly, history teaching, was extremely blunt.

However, was there any alternative? Who or which could cover that national deficiency? Actually, no institution at the time had the strong and systematic power to undertake such a task. Neither the Greek governments, the foreign kings, or the Army, nor even the Orthodox Church, were able, though rather willing, to propagate and diffuse national aspirations. The reason was that, despite their alleged strength to influence people, they were often dismissed or portrayed in disparaging tones by newspapers or the people themselves for their incompetence to promote the national goals or to meet the general needs of people, their strongly authoritative and, consequently, unpopular character, their dispiritedness and indecisiveness, or, even more, their hypocrisy to hold firmly and sincerely their own predictable standards and virtues. Undoubtedly, they made efforts towards that end, yet these were too feeble and really ineffective for manipulating the whole nation.

It seems, therefore, that the only power that took considerable pains to convert Greeks to the national creed was the press. During the greatest part of the nineteenth century newspapers or periodicals always tried to remind Greeks of irredentism, spreading rumours for real or alleged Turkish violence in the not-yet liberated areas of the Ottoman Empire, validating and accentuating the struggles and revolts of a sizable Greek minority which lived there, writing fervent articles in defence of historical and national rights, scorning the Turks for their brutality, dirtiness or awkwardness too. The function of the press in Greek society substituted schooling in the nationalism's indoctrination.

However, it can be argued that the impact of the press on Greeks would be rather weak, for, as we have seen, most of them were illiterate or barely literate. Nevertheless, it seems that coffeehouse, which essentially served as the birthplace of public opinion and as a place of self-regulating modes of social interaction, played satisfactory the critical intermediated role between nationalism and people. Men, who were only admitted to coffee-house, frequented there to drink coffee, play cards or exchange rumours, gossips and various political narratives. However, they listened also to newspaper articles which were read by the more literate men, validating the idea that daily newspapers and coffee-houses come into existence at the same time. Coffee-house could be therefore considered not only as the center of political dissent, but also as the place of a less formal, more relaxed, and non-disciplined, national propaganda, without school requirements and assessments. To be sure, such a hypothesis needs certainly a further investigation.

The historical development of the formation of the elite in the south of the Habsburg Empire. Slovenes and the schooling of the intellectual class in the late 1800s and early 1900s*

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ABSTRACT: This paper presents the influence of the power of education and the formation of the intellectual class in the Slovenian provinces in the south of the multi-ethnic Habsburg Empire, which played an important role in the formation of the Slovenian nation. The social stratum of middle-class intellectuals, which was at that time rapidly becoming the carrier and the designer of the Slovenian national movement in the 2nd half of the 19th century, was shaped to a great extent through the education system. Slovenian pupils had to gain proficiency in the German language already in primary school in order to be able to continue their schooling at gymnasiums. The absence of a Slovene University before 1919 may also have channelled a lot of practical intellectual energy into primary school education, facilitating the cultural and economic development of the countryside and a general increase in the nation's literacy, so that in 1910, 85.5% of all Slovenes were already literate. The intellectual class was comprised of secondary school students (including those from secondary modern schools and teacher training colleges and other secondary schools) as well as the Slovene students attending university in Vienna and Graz, and later also Prague, and the students of the theological schools in Slovenia. The supporters of the national movement were well aware of the contribution of the Slovene-oriented intelligentsia to the development of the nation. As regards their national orientation, these students mainly viewed the Slovene national movement favourably and many of them were also enthusiastic supporters of Slavic cooperation, while the more radically nationally inclined among them even considered working towards the establishment of a Slovene nation state their main task. The different political orientations also formed

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different student societies. The initially small body of educated Slovenes was in time joined by more and more high school and college graduates after the end of the 19th century, which had a big impact on the faster cultural and economic development of the nation as a whole.

EET-TEE KEYWORDS: History of Education; Primary School; Secondary School; University; Nation; Slovenia; XIX-XX Centuries.

Introduction

The intellectual classes also played an important role in the ethnic formation of the Slovene nation. So much so, that a saying which was popular in the 1890s even stated «The Slovene nation IS its intelligentsia»¹. The social stratum of middle-class intellectuals (or the intellectual bourgeoisie; in German: *Bildungsbürgerthum*), which was rapidly becoming the carrier and the designer of the Slovenian national movement in the 2nd half of the 19th century, was shaped to a greater extent by the Slovene schools². The economic middle class, comprised of the entrepreneurs and tradesmen, was less developed. By WWI, however, the Slovenes had become a completely developed cultural nation with national and cultural institutions, its own press and fully formed language³. The relatively well-developed primary school system (in 1910, 85.5% of all Slovenes were already literate) enabled further education and a rich and varied society.

Already in the middle of the 19th century, an article was published on the importance of the genteel upper classes (Slovenian: *gospôda*) for the Slovenian national movement, amongst whom the (relatively few) Slovenian patriotic students were also counted. While comparing the nation to a tree, the author of the article likened the upper classes and the intellectual classes to its beautiful,

of Elite Formation in Eastern and Central Europe (Institut européen, University of Geneva, April 2011). I'm grateful to Eva Žigon for her assistance in English language editing.

¹ J. Puntar, *Slovenski narod, njegova inteligenca in dijaštvo* [The Slovenian nation, its intellectuals and students], «Čas», vol. 2, n. 6, 1908, pp. 280-290, esp. 281.

² P. Vodopivec, *Vloga slovenskih intelektualcev pri emancipaciji Slovencev* [The role of Slovenian intellectuals in the emancipation of the Slovenes], in S. Granda, B. Šatej (edd.), *Slovenija 1848-1998: iskanje lastne poti*, Maribor, Zveza zgodovinskih društev Slovenije, 1998, p. 125; Id., *Kulturno-duhovne razmere na Slovenskem v 19. stoletju* [Cultural and Spiritual Conditions in Slovenia in the 19th Century], «Bogoslovni vestnik/ Theological Quarterly, Ephemerides theologicae», vol. 67, n. 1, 76, 2007, pp. 9-17. <<http://www.teof.uni-lj.si/uploads/File/BV/BV-07-1-02-VodopivecFrint.pdf>> (accessed: October 17, 2014); Id., *O gospodarskih in socialnih nazorih na Slovenskem v 19. stoletju* [Economic and social opinions in Slovenia in the 19th century], Ljubljana, Inštitut za novejšo zgodovino, 2006, p. 13.

³ V. Melik, *Slovinci 1848-1918, Razprave in članki* [Slovenes 1848-1918 Studies and articles], Ljubljana, Inštitut za novejšo zgodovino, 2002; M. Žvanut, *Slovenski jezik: Identiteta in simbol* [Slovene language: Identity and Symbol.], Ljubljana, Narodni muzej Slovenije, 2007.

lush foliage, and the men of letters to its precious flowers⁴. The press in this period also published encouraging comments, stating «The Slovenian nation is worthy of the intellectuals living within it and for it»⁵ and continued later: «The goal of education is not only to raise the individual, but to bring benefits to an entire nation»⁶. Not only the students of the classical gymnasiums (grammar schools, known also as «Latin schools»), but also the students of the secondary modern schools, teacher training colleges, and other secondary schools, as well as the students of the theological schools in the homeland and the Slovene students attending university throughout the monarchy were deemed as belonging to the intellectual classes. Namely, the words «dijak» (pupil, secondary school student or «gymnasiast») and the designation for the somewhat older «študent» (student) were used as synonyms to denote an intellectual engaged in studies – regardless whether this was at the secondary school level or at a university⁷. Despite the big differences in social status between the secondary school professions (for example primary school teachers, clerks) and the professions that required college or university degrees (priests, physicians, lawyers, secondary school teachers, senior clerks)⁸, all were a part of an intellectual class in the Slovene lands that held varying convictions with regard to Slovene nationhood.

Until 1918, the development of schools on Slovenian territory⁹ was determined by the state and legal framework of the Habsburg Monarchy – more precisely, the Austrian part of the dual monarchy, and by the peculiarities of the crown lands inhabited by the Slovenes. Of these lands, only the current area of central Slovenia, the then province of *Carniola* (Germ.: *Krain*; Slov.: *Kranjska*) was predominantly Slovenian, while in the other provinces, Slovenes formed only a part of the population, this being: approximately one third in the south of *Styria* (Germ: *Steiermark*; Slov.: *Štajerska*) and *Carinthia/Kärnten/Koroška*, more than 60% in the Austrian Littoral Region/*Küstenland* /*Primorska* (the county of *Gorizia and Gradisca*/*Görz und Gradisca* / *Goriško in Gradišansko*

⁴ M. Majar, *Slovenska gospôda*, «Kmetijske in rokodelske novice», vol. 16, n. 25, 23 June 1858, pp. 194-197.

⁵ *Domorodna naloga slovenskega dijaka v počitnicah*, «Slovenski narod», vol. 19, n. 172, 31 July 1886, pp. 1-2.

⁶ F.S. *Finžgar v Zagrebu*, «Slovenec», vol. 39, n. 72, 29 March 1911, p. 3.

⁷ A. Breznik, *O tujkah in izposojenkah*, «Dom in svet», vol. 19, n. 3, 1 March 1906, p. 149; Š. Lapajne, *Važne odločbe, XXI. Ustanove – dijaške*, «Slovenski pravnik», vol. 26, n. 2, 15 February 1910, pp. 41-42.

⁸ *Iz Gradca*, «Slovenski narod», vol. 9, n. 120, 25 May 1876, supplement, p. 3.

⁹ J. Mal, *Zgodovina slovenskega naroda* [The History of the Slovenian Nation], Vol. II, Celje, Mohorjeva družba, 1993; J. Fischer *et al.*, *Novejša slovenska zgodovina* [Slovenian contemporary history], *od programa Zedinjene Slovenije do mednarodnega priznanja Republike Slovenije 1848-1992*, Vol. I-II, Ljubljana, Mladinska knjiga, Inštitut za novejšo zgodovino, 2005; V. Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem* [The History of Education and Pedagogy in Slovenia], Vol. III: *1848-1870*, Ljubljana, Državna založba Slovenije, 1966 (Ljubljana, Delavska enotnost, 1988).

– with significantly less in the city of *Trieste/Triest/Trst*, while in the county of *Istria/Istrien/Istra* the Slovenes and Croats made up 58% of the population. Slovenes also lived in the Hungarian part of the monarchy, and after 1866, a small percentage of Slovenes also lived in Italy (Venetian Slovenia). In total, in 1869, approximately 1,500,000 inhabitants populated the entire area described above, a number which by the beginning of the 20th century had risen to approx. 1,800.000 inhabitants. Of these, 76.9% spoke colloquial Slovene (in German: *Umgangssprache*), while the other inhabitants spoke German, Italian (in the west), and some colloquial Hungarian (in the east). The population censuses in 1880-1953 covering a slightly smaller area of the current Republic of Slovenia (20,000 km²) show an increase from 1.1 million to 1.5 million inhabitants in this period¹⁰.

1. Literacy – the first step to school education

The third Austrian Primary School Act (passed in 1869) made schools subject to the state and set the foundations for the modern primary school by introducing high school education for teachers at teacher training colleges, monetary remuneration for their work, as well as eight years of compulsory primary school education (the form of which varied from province to province). Attendance in schools had been growing since 1880, and illiteracy among Slovenes was in strong decline. In 1921, only 8.8% of the Slovenes in Yugoslavia were illiterate (while the total illiteracy for the entire country was 51.5%), and in 1931 this number dropped even further to 5.46%. The Society of St. Hermagoras (*Družba sv. Mohorja*) publishing house had played an important role in this achievement with its active role in culture and education since the middle of the 19th century, while starting from the end of the 19th century, schools for adults and numerous educational courses also contributed significantly to adult education¹¹.

¹⁰ *Popisni atlas Slovenije* [Census Atlas of Slovenia] 2002, *Prebivalstvo in naselja* [Population and settlements], <www.stat.si>; *Statistični letopis* [Statistical Yearbook] Ljubljana, Statistični urad Republike Slovenije and Geografski inštitut Antona Melika ZRC SAZU, 2009: 4.2. Prebivalstvo [Population]. <http://www.stat.si/publikacije/pub_letopis_prva.asp> (accessed: October 17, 2014).

¹¹ Illiteracy of the population aged 10 and over on the territory of present-day Slovenia: 1880 39%, 1890 25%, 1900 15%. Cfr. V. Melik, *Slovinci in "nova šola"* [Slovenes and the New School System], in V. Schmidt, V. Melik, F. Ostanek (edd.), *Osnovna šola na Slovenskem 1869-1969* [Primary School in Slovenia 1869-1969], Ljubljana, Slovenski šolski muzej, 1970, pp. 31-63, especially pp. 53-54. B. Šuštar, *Školstvo v Slovinsku na prelome 19. a 20. storočja* [Schools in Slovenia at the turn of the 19th and 20th century], in V. Michalička (ed.), *Dejiny šolstva a pedagogiky na Slovensku*, Bratislava, Ústav informácií a prognóz šolstva, 2008, pp. 42-56, especially pp. 43-45.

Country school boards were now faced with the decision on the teaching language of primary schools, although in most parts of Carniola, the teaching language in primary schools was already predominantly Slovenian. In the Slovenian part of Gorizia County the primary schools were also mainly Slovenian, except for in the city of Gorizia/Gorica. Although there were no Slovenian schools in the city of Trieste, they existed in its adjoining Slovenian villages. In Istria, the establishment of Slovenian schools was rather slower – even in the municipalities – owing to the opposition of the Italian majority in the provincial school board. In Carinthia, bilingual primary schools were established in 1879 with the aim of discouraging Slovene nationalism, as in effect, the Slovenian language was used merely as being helpful in the first two grades for the transition to classes in German. In Styria, the situation was a little better, as the Slovenian municipalities had managed to obtain Slovenian schools, where German was only one of the subjects taught. At the end of the 19th century, there was an increase in the number of schools, classes, teachers and students in the Slovenian provinces, and a little under half of the students were female. The language issue in the Slovenian provinces had a considerable influence on the development of schools towards the end of the 19th century, as did also the private kindergartens and schools of the Italian (*Lega Nazionale*), German (*Deutscher Schulverein*) and Slovene oriented national schooling organizations (*Družba sv. Cirila in Metoda / Society of Sts Cyril and Methodius*)¹².

After 1870, teachers with high school educations (graduates of the teacher training colleges) taught in primary schools, which now had more extensive curricula¹³. At these colleges, the lectures were mostly conducted in German and only rarely in Slovenian, Italian and German, Italian, German and Slovenian or Slovenian and Hungarian. Subsequently, although teachers did form a part of the vocational stratum of the intellectuals, due to their modest wages and other factors, they were regarded as only half-educated by the richer elite and the university graduates, such as physicians, lawyers, notaries, judges and priests. Yet the better education they now received and the ensuing self-confidence this gave them, also gave rise to an increased liberal orientation amongst the Slovenian teachers, which, by the end of the 19th century, became the predominant orientation amongst the profession. A large percentage of teachers was active not only in the field of pedagogics (as textbook authors) and culture (music, cultural societies, publishing, literature), but also participated

¹² J. Sagadin, *Kvalitativna analiza razvoja osnovnega šolstva...* [A Qualitative Analysis of the Development of Primary Education...], in V. Schmidt, V. Melik, F. Ostanek (edd.), *Osnovna šola na Slovenskem 1869-1969* [The Primary School in Slovenia], Ljubljana, Slovenski šolski muzej, 1970, pp. 65-170, especially p. 151.

¹³ Melik, *Slovenci in «nova šola»* [Slovenes and the “new school”], cit., pp. 31-63; E. Protner, *Herbartistična pedagogika na Slovenskem* [Herbartianist Pedagogy in Slovenia] 1869-1914, Maribor, Slavistično društvo, 2001; Id., *Pedagogika in izobraževanje učiteljev* [Pedagogy and teacher education] 1919-1941, Nova Gorica, Educa, 2000.

in the development of cooperative societies (savings banks, loan societies) and in other economic activities (fruit growing, apiculture)¹⁴. Dr. Franc v. Močnik, for example, gained renown among the Slovenian teachers as a prolific writer of mathematics textbooks, and from this reason was one of the most known Austrian pedagogues of the 2nd half of the 19th century¹⁵. A significant number of well-educated and hard-working female teachers were also connected with the beginning of the feminist movement on Slovenian soil¹⁶. The high school professors (who taught at the high schools and modern secondary schools) were undoubtedly a part of the social elite, owing to their university educations. Among these, we must also mention the Franciscan friars, who taught at gymnasiums and primary schools until 1870, as well as the nuns (e.g. of the Ursuline order), who ran the private girl's schools.

2. *Gymnasiums and other secondary schools open the way for intellectuals*

A very small number of students or pupils continued their educations at higher-level schools upon completion of the initial few years of primary school, so that their primary schooling (from 12 to 14 years of age) took place in civic or other schools (secondary, vocational, agricultural). In 1854, there were about 940 Slovenian secondary school students¹⁷ and in 1913, less than 5% of the school children in Styria and Carinthia continued their educations, with only 2% in Carniola, while this percentage was only slightly higher in the Littoral due to the influence of Trieste. Only a part of these 11,384 children,

¹⁴ S. Pavlič, *Sto znamenitih osebnosti v šolstvu na Slovenskem* [One hundred famous Personalities in Education in Slovenia], Ljubljana, Prešernova družba, 2000; B. Šuštar, *Učiteljske organizacije na Slovenskem in njihova idejna usmeritev od srede 19. do sredine 20. stoletja* [Teachers' organisation in Slovenia and their conceptual orientation from the mid-19th to the mid-20th century], «Šolska kronika/School Chronicle», vol. 34, n. 2, 2001, pp. 329-339; Id., *Učiteljstvo* [Teachers], in D. Voglar (ed.), *Enciklopedija Slovenije 14 U-We* [Encyclopedia of Slovenia], Ljubljana, Mladinska knjiga, 2002, pp. 13-14.

¹⁵ J. Povšič, *Bibliografija Franca Močnika* [Bibliography of Franc Močnik], Ljubljana, Slovenska akademija znanosti in umetnosti, 1966; B. Šuštar, *Pogledi na Močnikove matematične učbenike v prevodih v številne jezike* [Močnik's mathematical textbooks translated into many languages] in M. Magajne (ed.), *Z vrlino in delom* [Virtute et opera]: *dr. Franc Močnik (1814-1892)*, Idrija, Mestni muzej, 2014, pp. 41-51.

¹⁶ M. Milharčič Hladnik, *Šolstvo in učiteljice na Slovenskem* [The Education and Women Teachers in Slovenia], Ljubljana, Znanstveno in publicistično središče, 1995.

¹⁷ 1854: secondary school students (Slovenes) Carniola/Krain/Kranjska (440), Styria/Steiermark/Štajerska (283), Carinthia/Karnten/Koroška (63), county of Gorizia/Goriška (about 150) – 940 Slovenes. Cfr. *Tafeln zur Statistik der österreichischen Monarchie* / zusammengestellt von der Direction der administrativen Statistik, Neue Folge, II. Band, Wien, K. k. Hof- und Staatsdruckerei 1859, pp. 32-33.

who attended 'other' schools in 1913, went on to continue their schooling in gymnasiums, with hopes of attending a college or university upon graduation¹⁸.

The supporters of the national movement were well aware of the contribution of the Slovene-oriented intelligentsia to the development of the nation. Subsequently, at the beginning of the 1870s and throughout the 1880s, they encouraged the peasant farmers to send their talented sons to secondary schools, and provided them with information on the better employment prospects education brought and on the scholarships and other forms of support available¹⁹. In the 1880s, the Catholic camp also wrote that there was a lack of educated people among the Slovenes, stating: «Parents, let your sons go to school». With this injunction they hoped not only to gain more priests, but also more Slovenian clerks, teachers, doctors, notaries, lawyers, pharmacists, merchants, engineers, artisans and manufacturers, and saw the struggle for the education of more farmer's sons as nothing short of their national duty. In their opinion, it was crucial to the existence of the nation that their fellow countrymen be schooled on Slovenian soil for the intellectual professions («such as only educated people are capable of performing»), so that they would work in their native language in the schools, offices and in public life. All of the clergy were already nationally oriented²⁰.

Parents, who provided most of the funding for their children's education, were keenly interested in their offspring's success during their studies²¹ and secondary school pupils from rural areas in particular would find their funding discontinued if they failed to make the grade. Slovenian pupils had to master all their lessons in German – the language in which primary school was taught – in order to be able to continue their schooling²². In 1898, an article wrote «Truly, our Slovenian boys must be exceptionally talented in order to claw their way to secondary school under the existing conditions». One of the speakers at a mass meeting of the national movement (*taborsko gibanje*) in 1869 stated that «it should not be hidden from our fellow countrymen, that 1½ million Slovenes haven't so much as graduated from a gymnasium, nor even a modern secondary school, despite the existence of about 2,000 Slovenian pupils – a wrong such

¹⁸ Sagadin, *Kvalitativna analiza razvoja osnovnega šolstva...* [A Qualitative Analysis of the Development of Primary Education...], cit., p. 150; *Statistik der Unterrichtsanstalten in Österreich für das Jahr 1912/13*, Wien, K. K. Statistischen Zentralkommission, 1917.

¹⁹ *Narastaj naše inteligencije iz kmetstva*, «Slovenski narod», vol. 6, n. 98, 30 April 1873, p. 1; *Slovenski starši, pošiljajte svoje sinove študirat!*, «Slovenski narod», vol. 15, n. 190, 21 August 1882, p. 1 and n. 191, 22 August 1882, p. 1.

²⁰ Dr. Jurtela, *Starši, dajte svoje sinove v šolo*, «Slovenski gospodar», vol. 18, n. 37, 11 August 1884, pp. 289-290; *Nakane nemčurjev in nemškutarjev pogubne Slovincem*, «Slovenski gospodar», vol. 15, n. 32, 8 August 1881, p. 249.

²¹ J. Lego, *Karakteristika naroda slovenskega*, «Slovan», vol. 3, n. 15, 1 August 1886, pp. 235-236; n. 16, 15 August 1886, pp. 252-253.

²² S. Jeklinov, *S Koroškega*, «Slovenski narod», vol. 31, n. 76, 5 April 1898, pp. 3-4.

as not even the Turks could have dealt us»²³. The Slovene delegates to the Viennese Parliament also warned that the gymnasiums in Carniola, where more than 90% of the population was Slovene, cultivated the second native language of the province (i.e. German) more than Slovenian, despite the fact that German was not the mother tongue of the vast majority of their pupils.

The Slovene demands for a university were often met by the retort: «What do you want with a university if you don't even have secondary schools?»²⁴. An interesting fact though is that, the less numerous Italians and even the Croatians in the Austrian half of the monarchy had their own secondary schools. Still, although the teaching language in most gymnasiums and modern secondary schools (Germ.: *Realschule*; Slov.: *realka*) until 1918 was German, lessons in the lower grades and in certain subjects were also taught in Slovenian. The Slovene-German civic modern secondary school in the important mining city of Idrija (1901), as well as the Slovene diocesan private gymnasium in Ljubljana (1905) and the state gymnasium in Gorizia (1913)²⁵ in particular paved the way towards the Slovenization of the secondary schools, which was finally achieved in the new Yugoslavian state in 1918. The national awareness of the Slovenian intellectuals was forging a path, despite German being the official teaching language in secondary schools in most of the subjects, and sometimes also in spite of the presence of German-oriented or German nationalistic professors²⁶.

Further schooling was provided by gymnasiums, as well as modern secondary schools, which Slovene pupils attended in different places. Analysis of the Austrian statistics (as published in the *Österreichische Statistik*/Austrian Statistics)²⁷ on pupils whose mother tongue was Slovenian attending the *gymnasiums* on the territory of present-day Slovenia (Ljubljana, Celje, Maribor, Ptuj, Kočevje, Kranj, Novo Mesto, Koper/Capodistria) and outside of its present borders (Trieste/Trst, Gorizia/Gorica, Klagenfurt/Celovec, Villach/Beljak, show the differing influences the various gymnasiums had on the education of Slovenes. In 1881, the number of Slovene pupils varied from school to school, yet showed an overall increase over the following years (1881: Ljubljana 81.8%, Celje 49.81%, Maribor 48.24%, Ptuj 62.61%, Kočevje 19.51%, Kranj 100%, Novo Mesto 90.91%, Koper 1.28%, Trieste more than 20%, Gorizia 41.19%, Villach 15.72% and Klagenfurt 13.89%). Slovene pupils also

²³ R.A., *Božidar Raič*, «Slovan», vol. 2, n. 22, 15 November 1886, p. 341.

²⁴ *Govor župana Hribarja*, «Slovenski narod», vol. 34, n. 214, 18 September 1901, pp. 2-3 (supplement). The Mayor of Ljubljana Ivan Hribar relates a comment made by dr. Josef Kaizl, 1898/99 the Austrian Minister of Finances.

²⁵ J. Ciperle, *Pota do moderne gimnazije na Slovenskem* [The ways to the modern grammar school in Slovenia], in F.M. Dolinar (ed.), *Sto let Zavoda sv. Stanislava, Ljubljana, Družina*, pp. 353-364.

²⁶ *Ormož*, «Kmetiski prijatelj/Der Bauernfreund», vol. 1, n. 6, 1. October 1882, pp. 5-6.

²⁷ E. Hriberšek Balkovec, *Avstrijska statistika in gimnazije na Slovenskem 1881-1913* [Österreichische Statistik/Austrian Statistics and Slovene Grammar Schools from 1881 to 1913, Vol. I., II], «Šolska kronika/School Chronicle», vol. 27, 1994, pp. 15-22; vol. 28, 1995, pp. 78-83.

attended two other gymnasiums in Carinthia (Völkermarkt and St. Paul's), yet already in 1880, these two schools lacked the enthusiastic and Slovene-oriented intellectuals educated in national awareness that were the driving force of the Slovene national movement in the other schools²⁸. Owing to Germanization (lessons taught in German), the academic results of the students attending the gymnasium in Gorizia whose mother tongue was not German were very poor²⁹. The number of gymnasiums continued to increase in this overall area until the dissolution of the monarchy, by which time there were three gymnasiums in Ljubljana and two in Celje³⁰. Some Slovenes also attended gymnasiums elsewhere in Austria, Croatia and the Hungarian part of the monarchy³¹.

In 1891, the Slovenian intelligentsia in Styria warned about the poor schooling conditions, as half a million Styrian Slovenes had only two half-Slovene gymnasium classes, and the economic school and teacher training college in Maribor intended for Slovenes, were completely German teaching institutions³². Yet the introduction of Slovene parallel classes in the gymnasiums in the 1880s and 90s did not go by without problems and in 1895 even the Austrian government crashed due to the «Celje Grammar School issue»³³. According to the calculations of J. Kmet (1957), in the period from 1850 to 1900, the final exam (*matura*, Germ: *Abitur*, *Maturität*) introduced at the conclusion of 8 years of gymnasium by the school reform in the middle of the 19th century was passed by a little over 4,500 pupils in *the gymnasiums on Slovene territory*. In the first 30 years following the introduction of this examination (1850-1880), there were 2,162 graduates, and in the next 20 years, the number had increased somewhat (2,351). By the first decade of the 20th century (1901-1910) the number of Slovene graduates had increased even further (2,404), and included seven female pupils. This trend of growth continued in the decade during WWI and after it, with 3,534 male and 84 female graduates from 1911 to 1920. In the twenty-year period from 1900 to 1920, 6,022 pupils – both male and female – graduated from secondary school (5,031 male and 91 female)³⁴. The

²⁸ Iz Koroškega, «Slovenec», vol. 8, n. 119, 26 October 1880, pp. 3-4.

²⁹ *Ljudski shod akad. fer. društva Adrija v Gorici*, «Soča», vol. 33, n. 64, 12 August 1903, pp. 1-4.

³⁰ Hriberšek Balkovec, *Avstrijska statistika* [Austrian Statistics], cit., pp. 15-22, 78-83.

³¹ Id., *Avstrijska statistika* [Austrian Statistics], cit., pp. 78-83.

³² *Südsteierische Post in Slovenski narod*, «Slovenski narod», vol. 24, n. 260, 11 November 1891, pp. 1-2.

³³ J. Cvirn, *Celjsko gimnazijsko vprašanje* [Celje Grammar School Question] 1893-1895, «Kronika, časopis za slovensko krajevno zgodovino/Review for Slovenian Local History», vol. 45, n. 1-2, 1997, pp. 102-111; B. Goropevšek, *Celjsko gimnazijsko vprašanje 1895-1914* [Die Celje Gymnasialfrage 1895-1914], «Kronika», vol. 45, n. 1-2, pp. 112-125. <<http://www.dlib.si/?URN=URN:NBN:SI:DOC-YQAP9MWQ>> (accessed: September 15, 2014).

³⁴ J. Kmet, *Nekaj podatkov o razvoju naših gimnazij* [Some Data on the Development of Our Grammar School], «Prikazi in študije», vol. 3, n. 9, Ljubljana, Zavod LRS za statistiko, 1957, p. 24; M. Ribarič (ed.), *Od mature do mature: zgodovinski razvoj mature na Slovenskem 1849/50-1994/95* [From the matura to the matura. The historic development of the matura in Slovene

first female *matura* graduates on Slovenian territory were recorded after 1900. Gymnasium educations became more accessible to girls after 1919, with the Slovenization of secondary schools in the new state³⁵.

3. Which Austrian gymnasiums did Slovene students attend in the decades before WWI?

The gymnasiums in Carniola (Ljubljana, Kranj, Novo Mesto) were attended mainly by Slovene pupils (80% of the total number of pupils). Slovenes also attended Slovenian gymnasiums in Styria (Maribor, Celje and Ptuj) and in the Littoral (half the students at the gymnasium in Gorizia and about one third at the state gymnasium in Trieste were Slovenian) and in Carinthia, where, at the Klagenfurt gymnasium, approx. 15% of the pupils were Slovene. At the other gymnasiums, there were significantly less Slovenian pupils. The most attended gymnasiums operated in the regional city centres with from 20-30,000 inhabitants (Maribor, Gorizia, Klagenfurt) and in the two largest cities: Ljubljana (46,000) and the Austrian port of Trieste (229,000). The population of the latter outnumbered the population of the combined cities in the entire Slovene lands. Some gymnasiums operated in cities with more than 12,000 inhabitants (Koper/Capodistria, with somewhat more than that in Villach) or cities with approx. 7,000 inhabitants (Celje, while the slightly smaller town of Idrija had only a modern secondary school) or 4,600 inhabitants (Ptuj) which also had a gymnasium and which was followed closely by the even smaller gymnasium cities with populations of approx. 2,500 (Kranj, Kočevje, Novo Mesto). Slovenes also attended modern secondary schools in seven of the larger cities which already had gymnasiums. The mining city of Idrija received its secondary school (modern) in 1901, where Slovenian also became the teaching language (beside the German). At that time, there were on average more than 800 Slovene students attending gymnasium schools in Ljubljana, and 200 or more in each of the other cities (Novo Mesto, Kranj, Maribor, Celje, Gorizia), with a few dozen also in both Ptuj and Klagenfurt and some in Villach³⁶. On the other hands not only in the late 19th century some Croatian grammar schools

areas from 1849/50-1994/95], Ljubljana, Slovenski šolski muzej, 1998; M. Ribarič, *Od mature do mature. Zgodovinski razvoj mature na Slovenskem od 1849/50-1994/95* [From the matura to the matura. The historic development of the matura in Slovene areas from 1849/50 to 1994/95], «Šolska kronika/School Chronicle», vol. 38, n. 2, 2005, pp. 233-253.

³⁵ Ribarič (ed.), *Od mature do mature I* [From the matura to the matura], cit.

³⁶ Hriberšek Balkovec, *Avstrijska statistika* [Austrian Statistics], cit.; *Spezialortsrepertorium der österreichischen Länder: Spezialortsrepertorium von Steiermark bearbeitet auf Grund der Ergebnisse der Volkszählung vom 31. Dezember 1910, Wien 1917 / ...von Kärnten, 1918 / ... für das Österreichisch-Illyrische Küstenland, Wien, K. k. Hof- und Staatsdruckerei, 1918 / ...von Krain, Wien, Deutschösterreichische Staatsdruckerei, 1919.*

in the neighbourhood (with Croatian as the languages of instruction, e. g. Karlovac, Varaždin and even Zagreb) was popular for Slovene students from the south parts of Carniola/Kranjska and Styria/Štajerska³⁷.

In the decade from 1850-1860, it is estimated that only 0.36% of the population in the Slovene lands had a high school graduate level of education. Over the next decade, the number of new graduates more than doubled, increasing the total to approx. 0.1%. This percentage however does not consider the mortality rate and the number of modern school and teacher training college graduates. It is difficult to estimate the number of Slovenian intellectuals with at least *matura* diplomas in that period. Estimates place it at approx. 0.3% of the Slovenian population in 1900, taking into consideration the graduates of the last 40 years³⁸.

According to some evaluations, the percentage of educated people with at least a *matura* diploma in 1910 was about 0.4%. If we add to this the (Slovenian) female graduates from modern colleges and the approx. 2,500 Slovenian teachers, the total number of Slovenian educated persons with at least secondary school educations increases somewhat. However, the real Slovenian intellectual elite with college educations formed a far smaller percentage; maybe half as small as the above, if we also consider the number of students graduating every six years, which brings us to approx. 0.3% of the population.

4. *Intellectuals, educated people and the national movement*

Not all the students whose mother tongue was Slovene returned home upon finishing high school or even after graduating from college, as some found employment in Vienna or elsewhere in the monarchy. In the second half of the 19th century, Slovene professors often worked at Croatian gymnasiums³⁹, and some saw career opportunities in the other Slavic lands (Russia and Bulgaria)⁴⁰, made possible by the spirit of pan-Slavic cooperation. In the school

³⁷ A. Lisac, *Slovinci zagrebski dijaki* [Slovenes students in Zagreb] *v letih 1850/51-1917/18: prispevek k študijam o emigraciji slovenskih dijakov na Hrvaško (III)*, «Zbornik za istoriju šolstva i prosvete», vol. 9, 1975, pp. 94-109.

³⁸ The calculation takes into account all of the graduates in the last 40-years (1860-1900): 4,116 – 0.325%.

³⁹ I. Gantar Godina, *Slovenski izobraženci na Hrvaškem od 1850 do 1860*, [Slovene intellectuals in Croatia from 1850 to 1860], «Dve domovini / Two homelands», vol. 14, n. 20, 2004, pp. 77-94; Id., *Slovenski izobraženci iz Prage na Hrvaško* [Slovene intellectuals from Prague to Croatia], «Dve domovini / Two homelands», vol. 15, n. 22, 2005, pp. 197-218.

⁴⁰ I.V. Čurkina, *Davorin Hostnik*, «Zgodovinski časopis/Historical Review», vol. 22, n. 3-4, 1968, pp. 261-309; B. Šuštar, *Reakcii v slovenskati pedagogičeska presa predi 1-ta svetovna vojna za B"lgarskoto obrazovanie i obrazovatelnata dejnost na Anton Bezenšek v B"lgarija*, [Reactions in the Slovenian educational press before World War I to Bulgarian education and the educational

year of 1911/12, a statistical analysis encompassing the gymnasiums and other secondary schools in Slovenia and Istria – i.e. all the territories populated by Slovenes – shows there were 354 classes and 11,845 students in public schools, in addition to the 345 private classes recorded. This gives a total of 4,174 Slovenian pupils: most of them in Styria and Carniola and from the Slovenian Littoral, and a (smaller) remainder from the other regions. Of these only one fifth attended the modern secondary schools as compared to the *gymnasiums*. In the school year of 1912/13 about 8,500 young Slovenes were on their way to becoming members of the (semi-)intellectual class and about 4,367 of these would go on to study at institutions of higher education or universities⁴¹.

The statistics for the graduates after WWI (1920) are similar, with approx. 0.5% of the students completing their *matura* exams that year, with this percentage rising to 0.7% in 1930. In 1940, the number of secondary school graduates over the last 40 years was 14,988, constituting approx. 1% of the population⁴², and the percentage of people with *matura* certificates increased even more in the decade after WWII.

It may well be that the absence of a Slovene University prior to 1918 directed a lot of practical intellectual energy towards the increasingly popular primary schools, facilitating the cultural and economic development of the countryside and an increase in general literacy. Yet further schooling still remained an important means of social ascension, which was achieved only rarely by the most talented, as several records (memoirs) on the poor conditions endured by such individuals during their studies testify. It was often expected of the young and gifted men leaving the villages of their birth that they would attend more demanding schools in larger settlements or cities with the aim of joining the priesthood. In the eyes of the rural populace, this was also the only purpose of the «Latin schools», which initially had 6 and later 8 grades and prepared pupils for college. The possibilities for schooling were limited and contingent on the costs, and subsequently, many Slovene pupils were forced to return home after a trial year at university where the only other option open to them was to study to be priests. Yet Slovene priests did not engage in pastoral activities only, but through the direct contact they had with the Slovenian people, they

work of Anton Bezenšek in Bulgaria], in M. Karagjozova, M. Tomitova (edd.), *B"lgarskoto obrazovanie – nacionalni orientiri i evropejski izmerenija / Meždunarodna naučna konferencija*, (Gabrovo, Nacionalen muzej na obrazovanieto, 2008, pp. 13-25.

⁴¹ F. Vajda, *Statistika srednjih šol na Slovenskem in v Istri* [Statistics of secondary schools in Slovenia and Istria], «Popotnik», vol. 34, n. 8, 1913, pp. 233-240, 10, 1913, pp. 283-286; Id., *Statistika srednjih šol na Slovenskem in v Istri v letu 1913/14* [Statistics of secondary schools in Slovenia and Istria in the year 1913/14], «Popotnik», vol. 37, n. 3, in May 1916, pp. 103-109; n. 4, in July 1916, pp. 145-153; n. 5, in October 1916, pp. 204-209.

⁴² *Statistični pregled šolstva in prosvete v Drauski banovini za šolsko leto* [Statistical overview of the education and enlightenment in the Drava Province for the school year] 1936/37, 1939/40, Ljubljana, Banovinska zaloga šolskih knjig in učil, 1940, 1941. <<http://www.sistory.si/prirocniki.html>> (accessed: September 15, 2014).

also contributed towards the acceleration of the national, cultural and economic development of the Slovene nation and even influenced the politics of their times.

The elite of the intellectuals was also comprised of physicians, pharmacists, professors, teachers, junior and senior administrative clerks, the judiciary and lawyers. The prominent persons in Slovenian culture of the 19th century were mostly of these professions. The poet *Valentin Vodnik* (1758-1819) was a priest and a teacher, the poet *Franz Prešeren* (1800-1849) was a lawyer, and *Janez Bleiweis* (1808-1881), the politician and editor of Slovenia's leading newspaper, was a veterinarian. Naturally though, the cultural, economic and political elite also included numerous individuals with only secondary school diplomas or even without. The writer *Fran Levstik* (1831-1887), for example, didn't even have a high school certificate, and neither did the politician and Mayor of Ljubljana *Ivan Hribar* (1851-1941). And the prominent writer and playwright *Ivan Cankar* (1876-1918) had also only graduated from modern secondary school having been forced to discontinue his studies in Vienna. His contemporary, general *Rudolf Maister* (1874-1934), was a professional soldier who'd finished military school, but also a Slovenian poet of some interest. A second Slovene writer and one of staff of military forces (*Fran Maselj – Podlimbarski* 1852-1917) was also indicative of the intellectual status of military officers. An overview of the vocational composition of the committees governing the school sections of the national defence society of Sts. Cyril and Methodius (*Družba sv. Cirila in Metoda*) in 1900, which was widespread at the time in schools throughout the Slovenian lands, shows which professions were regarded as comprising the Slovenian intellectual elite. The chairs of the committees of this society in support of Slovene schooling were mainly teachers, landowners, priests, tradesmen, clerks, students, lawyers, notaries, railway employees, physicians, professors and holders of doctorates⁴³.

Next to a university or college degree, a diploma from a 'technical school, merchant school, craft (technical) school'⁴⁴, 'a lady's secondary school or lyceum', a 'gymnasium' or a 'modern school' was the best guarantee of finding a good job, and what's more, one that brought social prestige in the local environment at the least. A peculiarity among the schools in Ljubljana from 1834 to 1918, however, was the highly respected *Mahr's Merchant School* (Handels-Lehranstalt in Laibach, founded by J.F. Mahr), where German was the teaching language, and which, during its first 50 years of operation, was attended by 3,344 pupils from the entire region between the Adriatic, Alps

⁴³ A. Vovko, *Družba Sv. Cirila in Metoda: 1885-1918* [Society of Sts Cyril and Methodius] doktorsko delo / Doctoral dissertation, Ljubljana, Univerza Ljubljana, Oddelek za zgodovino, 1992, pp. 202-204.

⁴⁴ S. Serše, *Strokovno šolstvo v osrednji Sloveniji do leta 1941: s posebnim ozirom na obrtno šolstvo na področju Kranjske* [Professional education in central Slovenia], Ljubljana, Arhiv Republike Slovenije, 1995.

and the Danube⁴⁵. Even attending a *civic school* (Germ.: *Bürgerschule*; Slov.: *meščanska šola*), such as were more numerous after 1919 as a form of more demanding school for children aged from 10 to 14, or the higher grades of primary school available in the cities and larger settlements, ensured a solid education⁴⁶ in many respectable fields of work and influential professions; especially after 1945 in Yugoslavia, when different criteria for inclusion into the political and social elite began to apply. The Socialist Federative Republic of Yugoslavia itself was run by an extremely competent locksmith (Josip Broz Tito 1892-1980), and besides the intellectuals, many of the leading politicians were also former white and even blue-collar workers, while the leading ideologist of the political system (E. Kardelj 1910-1979) was a former teacher – demonstrating that in the first two decades after WWII, an education in itself did not guarantee instant access to the elite circles. The second half of the 20th century in the Slovenian republic of Yugoslavia stripped education of the aura of elitism achievable by dint of a university diploma alone even further, by making university studies freely available to the masses.

In the 19th century, student support societies made studying easier for many a pupil and student from poor families, along with boarding schools and numerous *scholarship foundations*, which made it possible for determined individuals to complete high school and even go on to colleges and universities or technical colleges (mainly in Vienna, Graz, Prague, and also in Innsbruck)⁴⁷. Many of the recipients of these scholarships decided to reciprocate by donating a part of their earnings to these students' and pupils' organizations, which encouraged the proliferation of Slovenian intellectuals. In 1918, there were 221 scholarship organizations in Carniola, which awarded more than 535 scholarships annually. The scholarships were mostly from 90 to 250 *kronen* (crowns) per annum, and only a few university scholarships were higher⁴⁸. Fifteen per cent of the students from Carniola studying at the University of Vienna received scholarships. The most renowned and successful of the scholarship foundations for Carniolan Students in Vienna was the Vienna-based Luka Knafelj foundation, which provided scholarships awarded by the university to a total of 510 students⁴⁹. Yet not everyone was so lucky. Many a student had to walk the path from

⁴⁵ *Die Handels-Lehranstalt in Laibach*, Festschrift, Laibach, Kleinmayr & Bamberg, 1884.

⁴⁶ *Krajevni leksikon dravske banovine* [Local Lexicon of the Drava Province], Ljubljana, Uprava Krajevnega leksikona dravske banovine, 1937 (Kulturni pregled /Cultural overview), pp. 14-16.

⁴⁷ P. Ribnikar, *Študentske in dijaške ustanove na Kranjskem* [The Institutions that Granted Scholarships for High School and University Students in Carniola/Studenten- und Schülerstiftungen], «Arhivi», vol. 22, n. 1-2, 1999, p. 13.

⁴⁸ *Id.*, *Študentske in dijaške ustanove* [The Institutions that Granted Scholarships], pp. 9-16: calculation taken from Appendix.

⁴⁹ *Ibid.*, pp. 9-16; A. Cindrič, *Študenti s Kranjske na dunajski univerzi 1848-1918* [Carniola Students at Vienna University from 1848-1918], Ljubljana, Univerza, 2009, p. 396; Luka Knafelj / *Lucas Knaffel* +1671.

being an enthusiastic *abiturient* (e.g. pupil of final year of gymnasium) upon graduating from secondary school to the sad reality of being a poor student in Vienna, as many life stories from that period testify⁵⁰.

Already during their secondary school years and even more so during their studies at university, Slovene students would form their *own ideological convictions and opinions regarding Slovene nationhood*. The students who had gone abroad and «drunk deep of the liberal spirits in foreign lands» drew closer to the liberal (and sometimes even social democrat) ideals, leaving behind the more conservative Catholic opinions entrenched at home⁵¹. Among the Slovene intellectuals, a lukewarm attitude towards religion was already an established fact in the 1880s. When deciding upon a profession, the pupils also experienced great financial and ideological distress – a fact made known to us from memoirs or the eulogies written for some of the less fortunate among them⁵². Although the majority of students around the year 1900 joined liberal student societies, which supported the national movement without religious underpinnings⁵³, there were also Catholic-oriented student societies (*Danica* in Vienna, *Zarja* in Graz). This ideological and political separation of spirits engendered the emergence of a growing circle of Slovene lay Catholic intellectuals, while the clergy was influential also in the fields of culture, economics and politics⁵⁴.

As regards national orientation, the students mainly viewed the Slovene national movement favourably and many of them were also enthusiastic supporters of Slavic cooperation, while the more radically nationally inclined among them (after 1896) even considered working towards the establishment of a Slovene nation state their main task. The different orientations also led to the formation of different student societies, as it was clear already in 1908 that «the pupils of Slovenia will never be of a like mind, nor strategy»⁵⁵. Upon encountering German culture and faced with the backwardness and narrow-mindedness of the conditions back home, some students even went over to the German side and were labelled traitors to their own nation. The song *Proklete grablje* (The Damn Rake) which made fun of a high school graduate who put on airs by speaking in a foreign language (i.e. German) and disdainfully shunning his mother tongue (Slovenian) was popular for a whole century, the song being a metaphor for such renegades⁵⁶. Yet there are also recorded cases of other

⁵⁰ K-c, +*Jakob Zajec*, «Soča», vol. 38, n. 17, 1 March 1898, pp. 2-3.

⁵¹ *Naš čolnič otmimo! (Dopis iz celjskega okraja)*, «Slovenski gospodar», vol. 32, n. 2, 13 January 1898, pp. 1-2; *Svobodomiselnno avstrijsko dijaštvo in protiverska gonja*, «Domoljub», vol. 21, n. 22, 28 May 1908, pp. 338-339; *Dijaško življenje na vseučiliščih*, «Slovenec», vol. 12, n. 227, 10 October 1884, p. 4.

⁵² A. Novačan, +*Peter Plohl* ..., «Narodni dnevnik», vol. 2, n. 119, 30 May 1910, pp. 1-2.

⁵³ J.D., *Mladi liberalci*, «Domoljub», vol. 22, n. 14, 8 April 1909, p. 258.

⁵⁴ Puntar, *Slovenski narod, njegova inteligenca in dijaštvo* [The Slovenian nation, its intellectuals and students], cit., pp. 280-290.

⁵⁵ *Ibid.*, p. 342.

⁵⁶ D. Globočnik, *Prvi stereotipi v slovenski karikaturi* [The first stereotypes in Slovenian

changes of heart and the transitions of students and members of the educated elite from liberal and pro-German standpoints to the Slovenian side.

In contrast to the social standing that successful students enjoyed as the nation's future intellectuals or even priests, failed students, on the other hand, weren't much appreciated at all. Subsequently, the belief that the main purpose of schooling was to produce suitably educated intellectuals, preferably «gentlemen» (Slov.: *gospod*) clergymen, persisted for a long time among the peasant farmers of Slovenia⁵⁷, as «a failed student is worth naught, being neither farmer nor a gentleman» (1903)⁵⁸. The epithet of «dissolute student» was also bandied about as an insult by members of parliament in heated political debates⁵⁹.

5. Slovene students and Austrian universities

The demands for a Slovenian university in Ljubljana arose in 1848 and continued emphatically, but regrettably without success until the end of the monarchy. In 1898, the establishment of a university fund brought a revival of the efforts for a Slovenian university. Before 1918, the Slovenes had studied mainly in Vienna (two thirds), in Graz (one third), and after the end of the 19th century, also in Prague, and to a lesser extent in Krakow. In their native land, Slovene students could only attend diocesan theology schools (Ljubljana, Gorizia, Klagenfurt and Maribor), and only certain select priests were sent by the bishops to study at universities in Rome or elsewhere in the monarchy (Innsbruck, Vienna, Graz)⁶⁰. In Vienna, the Slovene students of theology stayed at the Augustineum Institute⁶¹ for the education of the monarchy's clerical intellectual and spiritual elite⁶². Whether priests – with their four years of studies upon graduation from high school – ranked among the educated,

caricature], «Lives Journal», vol. 1, n. 2, 2010, pp. 68-79, <<http://www.livesjournal.eu/library/lives2/damgl2/stereotipi2g.htm>> (accessed: September 20, 2014).

⁵⁷ Šola in ljudstvo, «Slovenski narod», vol. 4, n. 4, 12 January 1901, pp. 1-2.

⁵⁸ *Ljudski shod akad. fer. društva Adrija v Gorici*, cit.

⁵⁹ Zlindra v drž. zboru, «Slovenski narod», vol. 34, n. 96, 27 April 1901, p. 1.

⁶⁰ M. Benedik, *Teološki študij na Slovenskem do 1919* [Theological Studies in Slovenia until 1919], in B. Kolar (ed.) *90 let Teološke fakultete v Ljubljani*, Ljubljana, Teološka fakulteta, 2009, pp. 36-57, 50-51.

⁶¹ F.M. Dolinar, *Frintaneum (Avguštinej) in Cerkev na Slovenskem* [The Frintaneum (Augustineum) and the Church in Slovenia], «Bogoslovni vestnik/ Theological Quarterly, Ephemerides theologicae», vol. 67, n. 1, 2007, pp. 19-22. Frintaneum/Frintaneum: Institutum sublimioris educationis presbyterorum ad sanctum Augustinum 1818-1919.

⁶² As established by T. Simšič: «Their common characteristics were orthodoxy, wide erudition, deep spirituality, the spirit of serving the Church and conservatism». T. Simšič, *Med različnostjo in enotnostjo: tržaško-koprski gojenci Frintaneuma* [Between Diversity and Unity: Frintaneum Students from the Diocese of Trieste-Koper (Capodistria)], «Bogoslovni vestnik/ Theological Quarterly, Ephemerides theologicae», vol. 67, n. 1, 2007, pp. 39-50.

was a subject of debate only in the odd political polemics on who merited being counted among the «flower of the Slovenian intelligentsia»⁶³. Despite its proximity, the University of Zagreb (founded in 1874) was less interesting to Slovene students because it was in the other, Hungarian half of the monarchy, which was governed by a different legal system.

Until the end of the 1880s, less than 400 Slovenian students annually studied at the Austrian universities and other Austrian colleges. In the decade from 1889-1899, this number increased every year with from 400 to 500 in 1895, and 500 to 600 a year after. In 1910, the number had risen to 824 students, with 926 just before WWI – most of them theologians and lawyers. Initially, there were approx. 100 lawyers every year, but already at the beginning of the 20th century, the profession made for the largest group of students⁶⁴. Before WWI, one third of the students were lawyers and quarter were theologians, whereby both groups had already accounted for the largest number of students before. The number of Slovene students of medicine, attending the faculties of art and the technical colleges differed considerably. The number of medical students was less than 20 until 1884, reached 50-60 at the turn of the century, and dropped again later. Before WWI there were 80-90 students of medicine. The number of students at faculties of the arts was above 100 in 1902 and above 200 two years later, and a couple of years later again less than 100⁶⁵.

The number of Slovene students of *technical colleges* wasn't high: from 70 in the 19th century, after which the number decreased due to the economic crisis, grew a little bit again, and only topped 100 in 1910. The Slovenian technical intelligentsia was represented by individuals, mainly from Carniola, where technical students had been receiving scholarships since 1892, as well as from the Littoral and Styria. The Society of Slovene Engineers had 81 members in 1902. Most of these were construction engineers, agronomists and foresters, with only a few from other fields such as chemistry, mining and electronics⁶⁶.

Considerably more research has been done on the studies of the Slovene intelligentsia in Graz and Vienna, and almost as much on the students in Prague. Between 1848 and 1918, 1,890 students from Carniola, the central Slovene province, matriculated at the *University of Vienna*. The most popular field of

⁶³ Nekapelan, Z *Gorenjskega*, «Slovenec», vol. 19, n. 56, 12 March 1891, p. 3. (Newspaper controversy referred to: «cvet razumništva/the flower of the intellectuals»; «ewiger Student/perpetual student»; «sprideni student/dissolute student»).

⁶⁴ V. Melik, P. Vodopivec, *Slovenski izobraženci in avstrijske visoke šole 1848-1918* [Slovene Intellectuals and Austrian Colleges 1848-1918], «Zgodovinski časopis/Historical Review», vol. 40, n. 3, 1986, pp. 269-282.

⁶⁵ *Ibid.*, p. 272.

⁶⁶ *Ibid.*, pp. 272-274; S. Serše, *Tehnična inteligenca na Kranjskem pred 1918* [Students of Engineering in Carniola before 1918], «Šolska kronika/School Chronicle», vol. 28, n. 3, 1994, pp. 23-31, especially p. 24; Id., *Slušatelji visokih tehniških šol – štipendisti deželnega zbora in odbora* [Students of Technical High Schools – Provincial Diet and Committee Scholarship Holders], «Arhivi», vol. 16, n. 1-2, 1993, pp. 99-102.

study was the Law (1,204 students). The Faculty of Arts (448 students) and the Faculty of Medicine (202) were a lot less attended, and the least students went to The Faculty of Theology (36), as they could study this at home. Most of the students (more than 80%) had graduated from *gymnasiums* in Carniola, with less than 10% having graduated elsewhere. A little less than half the students (47.5%) came from cities and market towns – among them almost 30% from Ljubljana and its surroundings, while a good half of the students were from smaller towns and villages. The mother tongue of most students from Carniola was Slovenian and German (73.1% and 14.3% respectively), although many did not enter the former in their application form⁶⁷. The social status of students can be deduced from the information on their father's professions, who were mostly clerks, civil servants or carried out independent professions (38.7%), employed in agriculture (25.3%), with some of them also in trade and traffic (15.4%) and in crafts and industrial activities (13.6%). Female students from Carniola matriculated at the Faculty of Arts (25) and of Medicine (6). Of all the students who matriculated (1,890), a good 22% finished their studies with a Doctorate, almost half of these within 6-8 years of their matriculation. Among those with doctorates, a half of them were lawyers (51%), almost one quarter (24.6%) students of medicine and a fifth from a faculty of arts, with only a twentieth (4.1%) from a faculty of theology. Analysis of the social backgrounds of students shows that the emphasis placed on the role of educated people from the countryside is disproportionate to the actual data. Most students from Carniola were of middle-class origin (60.5%) and only a few of these were middle-class by dint of their families' assets (1.8%). The families of some were middle class by education (17.2%). Most of them came from the lower middle class (41.5%), a further fifth of the students (21.9%) belonged to the families of agricultural proprietors, and around 5% came from the aristocracy (5.8%). Only (4.6%) came from working class families⁶⁸.

Between 1884 and 1914, a total of 3,322 Slovene students attended the geographically closest *University of Graz*. Most of these were from lower Styria (1,343), a few less from Carniola (798) and Trieste (783), and the least amount from the province of Gorizia (398). The students from larger cities and villages mostly opted for Graz, especially from the villages in Styria. Half of the students from lower Styria (1,343) were from Maribor, Celje and Ptuj, so that the students whose mother tongue was German were in the majority (56.51%). A third of the 798 students from Carniola were from Ljubljana and its surroundings. A good half of the students from the province of Gorizia/Gorica came from the provincial capital. Of the students from Carniola, 52% were Slovenian, as were a quarter of the students from Gorizia. The majority of the latter were Italian, and the same also applies to the students from Trieste.

⁶⁷ Cindrič, *Študenti s Kranjske* [Carniolan Students], cit., pp. 395-397.

⁶⁸ *Ibid.*, pp. 367-370, table p. 104.

Very few of the students from Trieste were Slovene. Several more students also came from locations near the Vienna-Graz-Trieste railway line, and the cities with preparatory schools also had a special influence⁶⁹. Most students had fathers that worked in the civil service (30 to 35%). The fathers of the Slovene students were also mostly from the upper and middle class, from the liberal professions, and the public services sector (teachers). Most Slovenian students studied the law, a lot less studied medicine and the arts, and even less studied pharmacology and theology⁷⁰.

Interest for studying at the *University of Prague* (in 1882 it was divided into a German and a Czech university) was on the increase among the Slovene students until the end of the 19th century. Students from the Slovene provinces went there at the beginning of the 20th century (12 in 1901) also due to their enthusiasm for the pan-Slavic idea and because of T. G. Masaryk. Their number grew to approx. 160 in 1907, after which it evened out at from 140 to 200⁷¹. By 1911, around 130 Slovenes had returned from Prague upon completing their studies, which were made possible in many cases through aid from the support organization for Slovene university students. The largest number of Slovene students in Prague was recorded between 1918 and 1921, finishing off the studies that they had begun in Graz or Vienna. The number was significantly lower after this time⁷². Among the students awarded doctorates from the Czech university in Prague there were approx. 85 Slovenes between 1901 and 1916, most of whom were lawyers. The majority of these PhD holders from our territory were born in Carniola (38) and Styria (24), and less in the Littoral (12) and Carinthia (5). Students from the Slovene lands also studied at the German university in Prague⁷³. Some Slovenes finished their studies at these Austrian universities with the highest distinction, obtaining a doctor's degree *sub auspiciis imperatoris*, which was solemnly awarded to them together with a reward (a diamond ring) in the presence of the Emperor's representatives⁷⁴.

⁶⁹ H. Heppner, *Študenti iz slovenskih dežel na graški univerzi 1884-1914* [Students from Slovene Lands at the University of Graz], «Zgodovinski časopis/Historical Review», vol. 46, n. 3, 1992, pp. 343-355; n. 4, 1992, pp. 469-478; vol. 47, n. 1, 1993, pp. 89-93; especially p. 353.

⁷⁰ *Ibid.*, p. 475.

⁷¹ P., *Jugoslovani v Pragi*, «Slovenski narod», vol. 51, n. 109, 16 May 1918, p. 1.

⁷² P. Ribnikar, *Podporno društvo za slovenske visokošolce v Pragi* [Benevolent Society for Slovene University Students in Prague], «Zgodovinski časopis/Historical Review», vol. 50, n. 1, 1996, pp. 171-193.

⁷³ I. Gantar Godina, *Slovenski doktorji v Pragi 1882-1916* [Doctors' degrees of Slovene Students at the Czech University in Prague from 1882 until 1916], «Zgodovinski časopis / Historical Review», vol. 44, n. 3, 1990, pp. 451-455.

⁷⁴ -š-, *Sub auspiciis imperatoris*, «Učiteljski tovariš», vol. 52, n. 21, 24 May 1912, p. 4; A. Benedetič, *Promocija sub auspiciis imperatoris* [The graduation/Promotio sub auspiciis imperatoris], «Zgodovina za vse/History for Everyone», vol. 11, n. 2, 2004, pp. 123-128.

6. *Slovenes after 1919: Ljubljana as the third city in Yugoslavia to have a university*

With the transition of the Slovenes into the framework of the new state at the end of 1918, changes also occurred in the state's cultural framework. The cultural differences as compared to the other regions in the state were extensive. Among the Slovenes in the Yugoslav state, illiteracy was low in 1921 (only 8.8%, compared to 51.5% in the entire country). This number fell even more in 1931 (5.46%). The transition of the Slovenes after the end of WWI and upon the dissolution of the Habsburg Monarchy into this new socio-economic and political arena encompassed not only the change in state, but also a change in the political position Slovenia now occupied within the new country. Previously, the Slovenes had been a part of the undeveloped south of the Austro-Hungarian Monarchy, and now they had become the relatively better developed northern part of the Kingdom of Serbs, Croats and Slovenes (from 1929, the Kingdom of Yugoslavia), and also gained their own national statehood.

Even if the belief that in doing so the Slovenes would once and for all cut off all ties with the German culture did not come to fruition, the new Slavic orientation showed also in the appointment of the professors at the new University of Ljubljana. Next to the Slovenes who had already established their rename at the Austrian and other Universities, a number of Russian lecturers was also welcomed as fugitives from the Bolshevik regime in Russia and contributed to the European flair of the young Slovenian university. These taught at technical colleges, the Faculty of Arts, and the Faculties of Law and Medicine⁷⁵. Within a little over a decade after WWI, the number of pupils in the secondary schools and teacher training colleges in Slovenia had increased noticeably, as had the number of students. The founding of the University of Ljubljana in 1919 greatly increased the possibilities for university studies. In the first ten years, 947 students had already completed their studies at the University of Ljubljana, almost one third of these at the Faculty of Law, many at the Faculty of Medicine and the others at the Faculties of Arts, of Theology and of Technology⁷⁶.

In the winter semester of 1928/29, 1,315 students matriculated in Ljubljana to study technology (485), the law (313), the arts (326), medicine (94) and theology (97). In two years, the number of students in Ljubljana had grown

⁷⁵ A. Brglez, M. Seljak, *Ruski profesorji na Univerzi v Ljubljani* [Russian professors at the University of Ljubljana], «Delovni zvezki ICK – Nacionalni razred», n. 2, Ljubljana, Inštitut za civilizacijo in kulturo - ICK, 2007, <<http://www.ick.si/PDF/Ruski%20profesorji%20na%20UL.pdf>> (accessed: October 25, 2014).

⁷⁶ L. Sušnik, *Akademski poklici* [Academic Professions], Ljubljana, Slovensko katoliško akademsko starešinstvo, 1932, p. 70; *Zgodovina slovenske univerze v Ljubljani do leta 1929* [A history of the Slovenian University of Ljubljana until the year 1929], Ljubljana, Rektorat Univerze kralja Aleksandra prvega, 1929, pp. 492-495.

even more (1,632 in the year 1930/31). Slovene students also studied in Zagreb (167 in 1930/31) and in Belgrade, especially the subjects that they couldn't study at home. Approx. 200 Slovene students studied abroad, mainly in Austria (113) and Czechoslovakia (61). In 1931, there were 2,032 students aged from 20-24, which formed 1.5% of the total Slovenian population in this age group⁷⁷. In 1939/40, the Yugoslav part of Slovenia had 14,949 secondary school pupils (both boys and girls), attending 8 gymnasiums (13,010), 6 teacher training colleges (643) and 9 technical schools (1,296), and almost 2,000 university students (1,583 male, 363 female). The students from Ljubljana were mostly locals. In 1938/39, 1,729 students (i.e. all the Slovene students) had registered Slovenian as their mother tongue. Most of these were born in the Yugoslav part of Slovenia. The majority of these students studied the law (678), technology (498) and the arts (428), while some also studied medicine and theology. At that time, a number of Slovenes still also studied in Belgrade (162) and Zagreb (436), making the total number of Slovene students in all the Yugoslavian universities 2,332. Of these, more than 250 Slovenes were from the Littoral region, which had been under Italy since 1920⁷⁸.

The number of educated people in Slovenia kept growing after WWII. In 1953, 11.5% of the people aged 10 or more had a lower secondary school or vocational school education at the least, 11.5% had a lower secondary school or vocational education, and 3.7% had finished various secondary schools – among them 1.3% with a *matura* final exam. Approx. 10,000 inhabitants of Slovenia (0.84%) had university or college educations, and by 1961, this number had already grown to over 20,000 (1.6%), of which three quarters had university educations. Most of these graduated after WWII⁷⁹. In the second half of the 20th century, the percentage of educated people with high school and university degrees kept growing, reaching almost 10% by 1971 (9.36%) of the population aged over 10 years⁸⁰.

Going to school was not only a means of ascending the social ladder for talented children from the countryside and from less wealthy middle-class

⁷⁷ L. Sušnik, *Akademski poklici* [Academic Professions], cit., p. 69; *Statistični letopis* [Statistical Yearbook], cit. in notes 10, 1953, p. 25.

⁷⁸ *Statistički godišnjak 1940 Kraljevina Jugoslavija, Opšta državna statistika = Annuaire statistique Royaume de Yougoslavie, Statistique générale d'état*, Knjiga X – Livre X, Beograd, Državna štamparija – Imprimerie nationale, 1941, pp. 354-357, <<http://www.sistory.si/statisticni-letopisi.html>> (accessed: October 14, 2014); Sušnik, *Akademski poklici* [Academic Professions], cit., pp. 67-73; *Zgodovina slovenske univerze* [A history of the Slovenian University], cit., pp. 492-495.

⁷⁹ *Statistični letopis* [Statistical Yearbook] cit., 1955, p. 15; 1964, pp. 49-51; R. Modic (ed.), *Petdeset let slovenske univerze v Ljubljani* [The 50th Anniversary of the Slovenian University of Ljubljana], Ljubljana, Univerza, 1969, pp. 164-167, 188-189.

⁸⁰ *Statistični letopis* [Statistical Yearbook], cit., 1971, p. 56; 1975, p. 57; 1985, p. 74; M. Jurca, *Osnovne, srednje in visoke šole 1956-1966 v Sloveniji* [Primary, secondary and higher education in Slovenia], «Prikazi in študije», Ljubljana, Zavod SR Slovenije za statistiko, vol. 13, n. 12, 1967, pp. 28-30.

families, but also served to preserve a suitable social status for the following generations in the families of intellectuals. By the end of the 19th century, the initially scarce number of educated people was joined after the close of century by more and more high school and college graduates, who had a significant impact on the faster cultural and economic development of the Slovene nation.



Fig. 1. Secondary school students or «gymnasiasts» graduated from the Gymnasium in Maribor, 1875 (Slovenian School museum, Ljubljana, photo collection, 1420).



Fig. 2. Women students graduated from the Teacher Training College in Ljubljana, 1883 (Slovenian School museum, Ljubljana, photo collection, 1420).



Fig. 3. Students from Slovenia at the University of Vienna. Members of Catholic-oriented student society «Danica», 1900 («Ilustrirani Slovenec», vol. 2, n. 1, January 3, 1926, p. 4; Slovenian School museum, Ljubljana, Library).

Russian schools abroad. National identity, Soviet reforms and cosmopolitan education by Sergey I. Hessen (1887-1950)

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ABSTRACT: This article deals with the history of Russian emigrant schools in the 1920s and 1930s. The October revolution and the civil war that divided the country for two years prompted many Russians to emigrate abroad to European countries. It was a veritable diaspora. Animated by the hope of returning home once the revolutionary impetus had calmed down, the Russian emigrant *intelligencija* created a network of schools. In some European countries, these were included in the national educational system, in others their existence depended only on the donations of fellow exiles. The first part presents a brief comparison between Russian schools in France and Czechoslovakia, bearing in mind that the Central Pedagogical Bureau for the Affairs of the Higher and Lower Russian School Abroad, founded in Prague, was responsible for the educational policy of all Russian schools on foreign soil. The second part describes the measures undertaken by the Pedagogical Bureau against the so-called “denationalization” of Russian emigrant children. In the third part, debates advanced by Pedagogical Bureau members Aleksandr Bem and Andrey Pavlov regarding contemporary Soviet reforms are discussed. Finally, the fourth part outlines aspects of Sergey I. Hessen’s thought: this well-known jurist and philosopher participated in the pedagogical debates in Prague before emigrating to Poland where he further developed his ideal of the modern school. His influence on post-war Italian school reforms is an example how important the contribution made by Russian emigrants was to European culture in the first half of the twentieth century.

EET-TEE KEYWORDS: History of Education; Cultural Identity; Educational System; Sergey I. Hessen (1887-1950); Soviet Union; USSR (Union of Soviet Socialist Republics); XIX-XX Centuries.

Premises

In the period between the Russian revolution of 1917 and the summer of 1920, frightened by the political changes underway that were sparking civil unrest in the name of communism, Russians loyal to the Tsarist autocracy migrated *en masse* to Slavic countries (notably Bulgaria, Poland and Czechoslovakia) and Turkey. Some less numerous groups emigrated to other countries including Finland. While waiting for the chance to return, emigrants founded a number of organizations that deployed a network of schools and educational institutions of various kinds so that their children would be educated in the Russian language, culture and traditions, and in the Orthodox religion, as a means of preserving a strong national identity¹.

From the early 1920s, in various European countries, the Russian emigrant communities strove to establish some kind of school system, as well as youth, cultural and charitable associations, through two main agencies that arose in the early years of emigration and were respectively charged with the financing of most institutions and of the educational policy for the so-called 'Russian school abroad': The Committee of the Russian *Zemstvos* and Towns for the Support of Russian Citizens Abroad (*Rossijskij Zemsko-Gorodskoj Komitet pomošči rossijskim graždanam za granicej*, in abbreviated form *Zemgor*) and the Central Pedagogical Bureau for the Affairs of the Higher and Lower Russian School Abroad (*Central'noe pedagogičeskoe bjuro po delam srednej i nižšej russskoj školy za granicej*). Chaired by the former President of the provisional Government, Georgy E. Lvov (1861-1925), the *Zemgor* was founded in Paris in 1921. It financed the educational system and schools outside the borders of Russia and encompassed all levels of education (from pre-school institutions to University), as well as youth, cultural and charitable associations for the Russian communities. In 1924 the *Zemgor* financed 64 of the 90 Russian schools for emigrants, and the education of 5,200 boys and girls².

A large group of Russian intellectuals had gathered in Central Europe, especially in Prague, and in 1923 they formed a Pedagogical Bureau. Chaired by the well-known educational psychologist and philosopher Vasily V. Zenkovsky (1881-1962), author of the famous collection of autobiographical tales of children who told of the vicissitudes of war, civil war and emigration³, the

¹ The history of the Russian emigration with regard to Germany, Czechoslovakia and Poland has been already investigated in depth by I. Mchitarjan, *Das «russische Schulwesen» im Europäischen Exil. Zum bildungspolitischen Umgang mit dem pädagogischen Initiativen der russischen Emigration in Deutschland, der Tschechoslowakei und Polen (1918-1938)*, Bad Heibrunn, Verlag Julius Klinkhardt, 2006; Eadem, *Prague as the centre of Russian educational emigration: Czechoslovakia's educational policy for Russian emigrants (1918-1938)*, «Paedagogica Historica», vol. 45, n. 3, 2009, pp. 369-402.

² Mchitarjan, *Das «russische Schulwesen» im Europäischen Exil*, cit., pp. 49-50.

³ See the collection of remembrances written by children *Deti emigracii*. Sbornik statej pod redakciej prof. V.V. Zenkovskago, Praga, Izdanie Pedagogičeskago Bjuro po delam srednej i nižšej

Pedagogical Bureau comprised around 20 members (distinguished professors, academics and professors of Pedagogy). In addition to managing Russian schools in Czechoslovakia, it actively engaged in the development of curricula for Russian schools abroad. At the same time it promoted the publication of investigations into the evolving Soviet education system, which it fiercely attacked. It also contributed to the development of the history of comparative education thanks to the work of the theorist and philosopher of education Sergey I. Hessen (1887-1950) who, after a decade spent in Prague, moved to Warsaw with his family. The Pedagogical Bureau had representatives in other European countries, but it alone was responsible for coordinating the development of the curricula adopted in the Russian schools abroad. In the second half of the 1920s, it organized 13 congresses in order to discuss pedagogical issues, and published a magazine «The Russian school abroad» (*Russkaja škola za rubežom*) which was one of the primary sources on which the present article has drawn⁴.

The presence of a Russian emigrant *intelligencija* was very important for the European culture of the early twentieth century, especially for France and Czechoslovakia. However, this article will examine some lesser-known aspects of the history of Russian emigrant educational institutions in the 1920s and 1930s. In the first part, it will present a brief comparison between schools set up in the two main countries that Russians emigrated to, France and Czechoslovakia, to illustrate the stages of their foundation, and the process of incorporating national school system disciplines in relation to the educational policy devised by the Pedagogical Bureau in Prague (I). After ascertaining that many children were not attending emigrants' schools and that the lengthening period of emigration was causing children to integrate (with the consequent annihilation of their native Russian culture), in 1924 the Pedagogical Bureau held the first Conference against the so-called 'denationalization' of Russian children's education in a bid to preserve their cultural and religious identity. During the Conference, some members of the Pedagogical Bureau noted that there had been a waning in the initiatives organized for Russian children and proposed measures to fight against the inevitable process of migrant children's denationalization (II).

At the same time as the creation of a school education system and out-of-school activities aimed at maintaining Russian identity, some intellectuals within the Pedagogical Bureau in Prague, including A.L. Bem and A. Pavlov, analysed and critiqued the Soviet reforms that were underway. They focused

russkoj školy zagranicej, 1925. See also the collection based on archive materials by L.I. Petruševa, *Otcy i deti russkoj emigracii*, in L.I. Petruševa (ed.), *Deti russkoj emigracii. Kniga, kotoruju mečtali i ne smogli izdat' izgnanniki*, Moskva, TERRA, 1997, pp. 5-20. Some of the children's remembrances collected by Zenkovsky have been translated into French in the volume *Les enfants de l'exil. Récits d'écoliers russes après la Révolution de 1917*, Présentés par Catherine Gousseff et Anna Sossinskaïa, Paris, Bayard, 2005.

⁴ Mchitarjan, *Das « russische Schulwesen » im Europäischen Exil*, cit., pp. 50-51.

primarily on the limitations, contradictions and failures produced by a series of reforms, which were drawing the Soviet United Labour School more towards a capitalist mass middle school than to a school devoted to a proletarian education (without early vocational training) (III). The philosopher Sergey I. Hessen too occupied a prominent place in these discussions because he defended the idea of a United Labour School, which had been introduced by the October revolution, and he went on to propose his own very distinctive ideal of what national education should be like (IV). Furthermore, his studies into comparative education represent a striking example of the transnational circulation of educational systems in the post-war era⁵, having contributed to the circulation of pedagogical ideas and educational models in the immediate post-war period in Italy⁶.

In some European countries, the Russian schools abroad struggled on until the late 1930s when WWII finally dispelled any hope of the emigrants' return, prompting their forced integration into national systems.

1. *Russian emigrant schools: a comparison between France and Czechoslovakia*

The educational system of the Russian schools founded by migrants in various countries of Europe in the inter-war period represents not only one of the most significant cases of education with a strong sense of national identity but also one of the most unusual chapters in the history of 20th-century European school education. Nevertheless, in most cases, these schools were not detached from national schools, since many of them were co-financed by national Governments in the countries in which they were established. They also introduced into the national curricula some disciplines that were considered useful for pupils' integration outside the classroom. In the mid-1920s in various European and non-European countries, there were 47 Russian high schools and 43 Russian elementary schools, attended respectively by about 9,000 and 7,000 children of the c.18-20,000 children of compulsory school age in exile; the remaining 3,000 children attended the schools of minorities within the neighbouring countries⁷.

One of the most significant aspects of the history of these schools is the fact that they were partially inspired the Russian reform drawn up in 1915 by the Education Minister, count Pavel N. Ignatiev (1870-1926), which had not been put into operation because of the First World War. Clearly influenced

⁵ J. Droux, R. Hofstetter, *Going international: the history of education stepping beyond borders*, «Paedagogica Historica», vol. 50, n. 1-2, 2014, pp. 10-26.

⁶ G. Chiosso, *Novecento pedagogico. Profilo delle teorie educative contemporanee*, Brescia, Editrice La Scuola, 1997, pp. 128-132.

⁷ Mchitarjan, *Das «russische Schulwesen» im Europäischen Exil*, cit., p. 45.

by Georg Kerschensteiner (1854-1932) and John Dewey (1859-1952), they adopted the principles of the Labour school and of the United Labour School that characterized pre-revolutionary pedagogy⁸.

Irina Mchitarjan, who has devoted an exhaustive study to this topic, argues that «the representatives of the Russian emigrant pedagogical scene saw however in the united school for democratic societies the only school principle, and the primary and secondary schools for migrants were closely linked»⁹. It should be pointed out, however, that the Russian schools system was not united, because it encompassed four levels of Russian-language schooling similar to the subdivision outlined by the Ignatiev Commission¹⁰.

Russian schools abroad, which ensured both elementary and higher education in Russian, could be attended regardless of the origin, religion, gender and nationality of the Russian children. In some case they also offered boarding facilities and made different kinds of assistance available for homeless children¹¹. With regard to high school (and in particular the gymnasiums), they adopted the curricula of tsarist Russian schools to which work education was added depending on the local conditions of the school. From 1923 onwards, the teaching of religion was no longer considered mandatory.

According to the decisions of the II Conference for Higher and Lower Russian School Abroad (Prague, 1925) – expressing a compromise due to the extending period of exile – «emigrant children had to be prepared for life in Russia and also for future life in their European country of residence»¹². This meant that in addition to the «national Russian school subjects», children were to be trained in the disciplines of their host countries, with the aim of facilitating access to higher education¹³. In the emigrant schools, most of the teachers were mother tongue speakers and used the demonstration method, based on experiential elements, as had been planned by the Ignatiev Commission; the American method of the Dalton Plan was adopted sparingly. The Conference promoted the formation of different types of clubs to stimulate initiative and independent activities and celebrations in honour of Russian writers. In many cases, schools had boarding facilities to accommodate both the orphaned children with psychic trauma and those with parents who did not have the means to take care of them¹⁴.

⁸ *Ibid.*, pp. 45-46.

⁹ *Ibid.*, pp. 54-55.

¹⁰ See I. Mchitarjan, *Der russische Blick auf die deutsche Reformpädagogik. Zur rezeption deutscher Schulreformideen in Russland zwischen 1900 und 1917*, Hamburg, Verlag Dr. Kovač, 1998, pp. 132-138 and W. Dowler, *Classroom and Empire. The Politics of Schooling Russia's Eastern Nationalities, 1860-1917*, Montreal & Kingston, London and Ithaca, McGill-Queen's University Press, 2001, pp. 197-210.

¹¹ Mchitarjan, *Das «russische Schulwesen» im Europäischen Exil*, cit., pp. 59-60.

¹² *Ibid.*, pp. 56-57 (p. 57).

¹³ *Ibid.*, p. 57.

¹⁴ *Ibid.*, pp. 58-62.

Of course these schools, by virtue of their curricula, staff and the presence of fellow-Russians, contributed to the preservation of a strong Russian identity, preparing children for their return to the motherland. The brief comparison between educational institutions in France and Czechoslovakia will show how schools were organized according to age (generally from kindergarten to high school) and were influenced by the national system adopted in the country of emigration, where even the *Zemgor's* financial intervention differed and was dependent on the number of children known to be present in several towns and cities¹⁵.

Russian emigration to France began in 1921 and went on increasing until 1923; in 1924 there were around 200,000 Russians who had been forced into exile. The refugees had a military background or had been state employees but also included former soldiers and craftsmen who found work in major French industries. During 1921-1922, the representatives of the *Zemgor* were unable to finance educational institutions in France because its funds were mostly allocated to institutions in Czechoslovakia and the Balkans. For this reason the *Zemgor* in France, in collaboration with another agency, the Union of the Russian Administration and Town Activists (*Ob'edinenie Rossijskich Zemskich i Gorodskich dejatelej*), confined their assistance to children who largely attended French schools by paying for their tuition, meals and schoolbooks¹⁶. Several philanthropic institutions became involved in the development of educational institutions: the Paris gymnasium (defined as the only middle school) with a total of 106 students; kindergartens and elementary schools in different cities with a total of 125 students; boarding-schools with a total of 431 students; complementary courses with a total of 350 students, mainly in Paris, Marseille, Nice, and Cannes, plus two schools in Tunisia¹⁷.

The Russian Gymnasium in Paris was opened in February 1920 on the initiative of the Committee for Town Administration and the Support of Russian Citizens Abroad, i.e. before the *Zemgor* was founded. During 1923-1924 the gymnasium had eight full classes and was attended by 200 pupils (of whom one third were females) all of whom lived at home because there were no boarding facilities to house them. With regard to the curricula, the gymnasium was based on the Russian gymnasium and pre-1917 Royal Institutions, modified in line with the requirements set down by the French Ministry of Education. The general course on the French language was expanded and courses of French literature, history and geography were introduced, accompanied by excursions

¹⁵ *The Educational Work of the Russian Zemstvos and Towns Relief Committee abroad*, Paris, Russian Zemstvos and Towns Relief Committee, 1927. The wide network of French institutions is less well-known compared with those in Czechoslovakia and Poland studied by Mchitarjan, *Das «russische Schulwesen» im Europäischen Exil*, cit., pp. 125-186, 187-225.

¹⁶ *Zarubežnaja russkaja škola, 1920-1924*, Pariž', Rossijskij zemsko-gorodskoj komitet pomošči rossijskim graždanam' zagranicej, 1924, pp. 125-143.

¹⁷ *Ibid.*, pp. 128-129.

to significant historical places. From 1923-1924 the teaching of the additional subjects, which also included chemistry and mathematics, was in French for the final years of school. By the sixth year, the gymnasium was subdivided into 'classical' and 'royal'. At the end of the studies a certificate was issued by a committee of Russian academics with the participation of representatives of the French Ministry of Education. The gymnasium was part-financed by student fees (amounting to one third of costs), with the remaining costs covered by contributions from the French Government. The *Zemgor* did not finance the gymnasium but distributed subsidies to the students. Raising money through donations did not spare these institutions from a serious funding crisis, which also meant that teachers' salaries were low¹⁸.

In France, two boarding facilities were also organized and offered separate housing for about 30 boys and girls attending vocational schools. The Union of Towns (*Zemsko-Gorodskoe Ob'edinenie*) opened a kindergarten for 50 children aged 3-8 years, which operated from 9 a.m. till 6 p.m. and, in addition to education, provided children with four meals a day. Some activities following the Fröbel and Montessori methods were organized for infants; while the older children were taught elementary subjects. The Union strove to ensure that the kindergarten was funded entirely through children's fees. The case of a kindergarten in the municipality of Méry sur Oise is interesting because it was set up by a noblewoman who had emigrated via Constantinople, bringing a group of 50 children with her. The Denisova taught Russian subjects and French language in kindergarten; children also learned a handicraft until they were ready to enrol at the other schools. A few orphanages and elementary schools were opened in some French cities, and courses in Russian school subjects were organized in some French high schools in Marseille, Cannes and Nice. A middle school and a marine school were founded in Tunisia¹⁹.

Compared to other European countries and even to France itself, Czechoslovakia – the homeland of Comenius – had the largest number of Russian schools because of the Pan Slavism that had characterized the Slovak romantic culture: Ján Kollár (1793-1852) had sought the unification of the Slavic peoples and this aspiration found acceptance in the new Government and in the majority of the population, even after the Great War²⁰. Aid associations for emigrants, arising later in Czechoslovakia than in France, distinguished themselves by the fact that they recognized and respected national differences, sub-dividing emigrant Russians, Ukrainians and Georgians to encourage further preservation of their cultural identities. The case of Russian educational institutions in Czechoslovakia is unusual because the schools were granted equal status to local ones, and there was a great variety of institutions from nursery

¹⁸ *Ibid.*, pp. 130-131.

¹⁹ *Ibid.*, pp. 133-143.

²⁰ *Ibid.*, pp. 77-84.

to secondary school (*Gymnasium*) and University, amounting to a total of 1678 places: two kindergartens in Prague, two gymnasiums in Moravská Třebová and Prague for children, who could continue in the Russian or Ukrainian secondary school, or indeed in Czech schools (at the State's expense).

The day nursery and kindergartens were opened in July 1922. The *crèche* for children between 6 weeks and three years and kindergarten for children from three to seven years of age (for 10 and 40 children respectively) were organized by the representative of the Provisional Town Association (*Vremennyj Glavnyj Komitet gorodov sojuza*) thanks to *Zemgor* financing, until the Ministry of Internal Affairs intervened in their maintenance. Both institutions were housed in buildings of the Prague day nursery and kindergarten. The children were washed and fed by a Russian nanny in the *crèche*; in kindergarten, with illustrations from Russian fairy tales painted on the walls, children were given individual attention and the American Hill method was adopted. Preschool education aimed to harmoniously develop children's physical health and ethical capabilities, intellect and aesthetics; some children learned to read with the Decroly method²¹.

A small school that opened in the fall of 1921 gave rise to the Russian reformed gymnasium, which became a middle institution with a boarding facility in the autumn of 1922 when an increase of migrant children was noticed. In 1923 the school had at six major and two preparatory classes with a total of 232 pupils (of whom 147 boys and 85 girls). The lack of a single building meant that classes were held in the local school in the late afternoon. 150 students who lived far away from the school were housed in the boarding complex. The Czechoslovak Government contributed to its maintenance and also provided meals, clothing, educational materials and medical check-ups. During the summer of 1923, 96 children were sent to residential camps and host families for the holidays.

From the point of view of the curriculum, the Prague gymnasium resembled the reformed Royal Gymnasias, in turn closer to the characteristics of Russian gymnasiums that had existed before the war. The Prague gymnasium preserved the teaching of Latin and the curricula for mathematics, natural sciences and modern languages were extended. Having equal status as State schools, the gymnasium adapted its curricula to those of Czech schools, and the Czech language was studied from the first year onwards. The gymnasium had to deal with the problem of the different levels of preparation of students, because they were of different ages and had studied under other curricula, often discontinuously. In early 1923 the teachers noticed that children who had lived and attended school in Russia during the revolutionary years were often behind in their studies but the differing levels of the pupils was resolved over the course of the year. The Director, the teaching staff and the technical school were

²¹ *Ibid.*, pp. 104-105.

appointed by the *Zemgor* and approved by the Ministry for Public Education and the Ministry for the Interior. There was a school library inside, and pupils revelled in the production of a school newspaper²².

Naturally, the Russian educational institutions in France were less stable than in Czechoslovakia, where they were mostly part of the national school system. However, in both countries, children were progressively integrating and the Russian agencies tried to deploy an array of extracurricular cultural activities aimed at strengthening national socialization in order to preserve the children's Russian identity. These initiatives proved even more urgent in countries where this network of Russian schools was absent.

2. *The defence of emigrant children's Russian identity (1921-1924)*

During the initial years of migration, in some countries Russian children who could not attend the complete course of Russian schooling attended the national schools of the countries where they resided. If they had lost their parents prior to emigration, they were placed in boarding schools. Because of their age and mental plasticity, these children would quickly lose their mother tongue, along with the whole culture and identity that the native language represents, and integrate perfectly. This is something that would nowadays be considered a desirable educational aim, but it was deeply upsetting to the Russian *intelligencija*.

Since the first wave of emigration, beginning in the autumn of 1920, some organizations were immediately charged with the setting up of after-school courses in Russian culture to prevent children from losing touch with their native identity. Among these, the Russian Committee for Child Support in Switzerland started offering courses in the autumn of 1920. These comprised courses in religion, Russian language, history and geography, for 55 children attending Swiss schools – 37 in Geneva and 18 in Lausanne. The *Zemgor*, which also organized Russian religious festivals for children during Christmas and Easter, provided some of the funds for premises and teachers' salaries. The Committee also funded lectures in Prague on various disciplines (religion, Russian language and history) attended weekly by 52 children from October 1921 to June 1922²³.

²² *Ibid.*, pp. 90-94.

²³ *Svedenija o dopolnitel'nyh škol'nyh russkich kursach in Soveščanie po bor'be s denacionalizaciej sozvanoe Pedagogičeskim Bjuro po delam srednej i nižšej russkoj školy zagranicej*, Praga, 4-5 oktjabrja 1924g., otd. Ottisk' iz' «Bjulletenja Pedagogičeskogo Bjuro po delam' srednej i nižšej russkoj školy zagranicej», n. 6, Praga, p. 16.

In other cases, there were educational institutions that reserved a day for the native culture of origin: in Varna (Bulgaria), Russian children living in French colleges were taught Russian disciplines during the free day; in Paris, Versailles and Nice courses were held in high schools (in the French capital the courses were held by a group directed by E.P. Kovalevsky). In other cases, as in Tunis in the summer of 1922, a group of Russian émigrés opened a children's club for singing lessons, dancing and games. The children then started lessons at the *Zemgor* school, which also provided teaching materials. In Berlin, as in Tunisia, there was a degree of collaboration between various migration agencies: the children who attended the German school were admitted to lessons in Russian language at the School of the Russian Academic Union. Religious education lessons were held by the Russian archimandrite in the *Zemgor* building. At the beginning of 1923, religious education and Russian language lessons were held by a priest and a teacher thanks to a donation; amongst the activities there were also singing, stories, games and conversations²⁴.

From the information that reached the *Zemgor* in Paris, which partially financed these initiatives, and to the Pedagogical Bureau in Prague, it emerged that the integration of children into their adopted nation was not seen in a positive light: it was regarded as a denationalization of the refugee children, something that worried the Russian *intelligencija* and that had to be prevented. For this reason, the Pedagogical Bureau members of Prague who were in charge of the educational content of Russian schooling in preparation for the longed-for return to Russia, organized a Congress of the Higher and Lower Russian School Abroad in 1923 and a Conference for the fight against denationalization (1924). During these meetings it tried to implement a range of strategies in favour of the preservation of emigrant children's mother tongue and native culture. These measures were necessary due to the fact that although emigrant families were initially well-educated, adults were often absent for work-related reasons and therefore could not take care of the children and encourage the natural emergence of bilingualism. On the other hand, the cultural roots were themselves delicate and the children themselves tended to sever them, perhaps hoping thus to forget traumatic events related to their past. Therefore, during the Congress of 1923, the Pedagogical Bureau members drafted proposals on complementary national courses of study for Russian refugees' children attending foreign schools (in Bulgaria, France, Czechoslovakia, Germany, Switzerland and Tunisia). The Pedagogical Bureau suggested organizing additional courses for the teaching of religion, Russian language and literature, Russian history, and geography, or at least some of these. In favourable conditions, with older children one could pass from the teaching of these disciplines to the teaching

²⁴ *Ibid.*, pp. 15-16.

of the culture of the homeland (*rodinovedenie*) with the knowledge of its Government, administrative bodies, commercial geography, and Russian art²⁵.

The Pedagogical Bureau also suggested implementing measures including the establishment of «itinerant teachers» (*peredvižnye učiteli*) with a short-term stay in different places to make up for the small populations of the Russian colonies or to its dispersal in small villages, the setting up of a Russian library for children which was necessary where there was no teaching of Russian disciplines, and the organization of various clubs and parties for children of all ages.

However despite the individual and collective measures recommended by the Pedagogical Bureau, it was decided in 1923 to open residential summer camps for Russian children. In Belgrade a camp had been opened for 65 children aged from 36 months to 16 years of age; children participated in the preparation of meals and clearing up afterwards. At Stephens College in Windsor a camp was organized for 29 children, having as its main objective «the preservation of children's love for and knowledge of their homeland due to the fact that Russian children attending the English college quickly forgot how to speak in Russian». The administration of the colony was entrusted to A.V. Tykvovaja who tied Russian culture and recreation, awakening children's interest in the homeland thanks to the cheerful atmosphere during the lessons, which included Russian language, geography and history, religion, singing and dancing. On the other hand, some courses were cancelled in London because parents were not able to accompany their children to class and could not pay for travel²⁶.

According to the Pedagogical Bureau, the purpose of these initiatives was to be animated by a deep attachment to Russian culture and emphasized that «the fight against Russian children's denationalization and the support of their national consciousness and love for the motherland must not contribute to the development in them of nationalist chauvinism and of a disdainful relation toward the conquest of the Russian culture. On the contrary, together with a strong national feeling and with a burning love for the homeland and, through these feelings, it was necessary to instil in children the aspiration to ideals of the whole humankind»²⁷.

During the Congress of the Higher and Lower Russian School Abroad (April 1923), it emerged that in relation to the serious situation that was emerging in the Soviet Union, «amongst the obligations of a Russian emigrant is the maintenance and education of the largest possible number of useful workers for the future Russia within the ranks of its children abroad»²⁸. The Congress

²⁵ О мерач борбы против денационализации русских беженских детей. Доклад П.Д. Долгорукова Совещанију Ped. Бјуро 4 окт. 1924 г., in *Совещание по бор'бе с денационализацией соэванное Педагогическим Бјуро по делам средней и нижней русской школы заграницей*, cit., pp. 6-8.

²⁶ *Ibid.*, p. 9.

²⁷ *Ibid.*, p. 7.

²⁸ *Dopolnitel'nye russkie nacional'nye učebnye kursy dlja russkich beženskich detej v inostrannich školach*, in *Совещание по бор'бе с денационализацией соэванное Педагогическим Бјуро*

proclaimed that, besides the danger of the child's denationalization (occurring after 7-8 months living in another family and forgetting the Russian language, or attending a foreign school), there were also the risks of conversion to Catholicism and oblivion of the national consciousness.

Subsequently, the Pedagogical Bureau held a plenary session on 14-15 July 1924 with the participation of representatives from Bulgaria, Poland, Finland, France, Estonia, Latvia, and Yugoslavia. A member of the Presiding Committee, Prince Petr D. Dolgorukov, emphasized that in the period 1918-1923, all efforts made by Russian emigration had been to organize Russian educational institutions of different types, because this was considered the «primary method of combating denationalization» and:

In the future, a concerted effort will be necessary to maintain and if possible improve all existing educational institutions. But first of all what has been said is true for French, German and English-speaking countries, where parents more readily send their children to local schools, with the result that the denationalization process occurs more quickly. Secondly, in some neighbouring countries like Poland for example, a large number of Russian émigré children remain outside the Russian school, despite their parents' attempts to send them there. Finally in Slavic countries too, where the Russian school enjoys the most favourable conditions, the combined effects of Russian State funding having been exhausted, and there having been a drastic cut in foreign private donations and in State funding, mean that not only is there no hope of expanding the Russian school, but it also is struggling with the prospect of significant reduction. We must use the lengthening period of emigration to provide our children with a better education in foreign languages, which is first and foremost necessary for their attendance of foreign higher educational institutions. This will be better realized with their attendance at middle school. So, in order to avoid denationalization, it is necessary to give them a chance to dedicate themselves to Russian complementary school subjects²⁹.

On the basis of this considerations, Dolgorukov suggested a series of measures for fighting against the denationalization of Russian children and young people. These initiatives could be individual or collective, depending on whether the children were already attending a Russian school, even if they were free-time activities.

Among the individual measures was the practice of the so-called «adopted children» that is of the children adopted 'from a cultural point of view' by individuals, groups or Russian educational institutions, who cultivated the Russian national consciousness, the knowledge of the Russian language and culture through written correspondence, conversations, the distribution of Russian textbooks, Russian calendars, postcards showing Russian life, and so on. These adopted children were taken in by Russian families or boarding schools on feast days or during vacations, and given the chance to attend

po delam srednej i nizšej ruskoj školy zagranicej, cit., pp. 13-14.

²⁹ *Ibid.*, pp. 11-12.

religious functions in Russian or at least fasting and devotions (*govet*) at least once a year, depending on the local context.

Amongst the collective measures, there was the establishment of clubs or associations for children not attending any educational institution. In the case of Russian children attending foreign schools, this included the setting up of residential summer camps, Russian homes, kindergartens, clubs and associations where they could spend a few hours per day; the organization of Russian holidays (e.g. Christmas, Easter celebrations and observances), plays, concerts, sports games, walks and excursions for Russian children living in foreign families³⁰.

From Dolgorukov's statement it is clear that the period of exile was lengthening and for this reason, it was necessary for migrants to find sufficient resources through the press to counter denationalization. Without waiting for figures to emerge from the Russian census of children not attending school, he urged people, groups or institutions to collect information on pupils enrolled at foreign schools or living in foreign families in order to take measures against the denationalization of children at the local level³¹.

Indeed, the information that arrived at the Pedagogical Bureau was alarming, mainly because despite the good intentions of participating refugees, their initiatives were sporadic and were failing to rekindle the flame of Russian identity in children. In fact, some complementary courses were cancelled in the cities where they had been opened (e.g. in Lausanne, Switzerland), while others were kept on (e.g. in Geneva, for 20 children); in Prague too they were cancelled as a result of the expansion of the gymnasium and the kindergarten. Children unable to speak Russian were brought to the Union of Towns kindergarten in Prague; and these were not only children from mixed marriages but also those with Russian parents who often left their children alone all day, with Russian families or simply in the streets. In Serbia, the children were scattered in small groups and, although it had been impossible to open an educational establishment, the Union of Towns had arranged lessons; yet these had to be cut due to a lack of funding. The most serious case was in Bulgaria, where a large number of children were found not to be attending either kindergarten or elementary school³².

The Pedagogical Bureau considered it very important to promote a number of initiatives such as the printing of a calendar for school children, the spread of initiatives such as the «Russian Network» (*Russkaja matica*) and the development of youth organizations such as the Brotherhood (*Bratstvo*) and

³⁰ О мерach борбы против денационализации русских беженских детей. Доклад П.Д. Долгорукова Совещанију Ped. Бјуро 4 окт. 1924 г., in *Совещание по бор'бе с денационализацией союзанное Педагогическим Бјуро по делам средней и нижней русской школы за границей*, cit., pp. 7-8.

³¹ *Ibid.*, p. 8.

³² *Ibid.*, p. 10.

of the *Sokol'stvo*³³ as a means of defending Russian culture. In fact, the history teacher at the Shumen gymnasium (in Bulgaria) tried to make teaching aids with the children featuring artwork (maps with scraps of newspaper articles and postcards). In Prague, the Russian section at the Council of Agriculture, responsible for the accommodation of more than two thousand Russian peasants, was preparing for the third year running to publish a Russian calendar, a collection of postcards, pictures and photographs. A calendar was printed for Russian peasants who had settled in villages and in some cases married and who had begun to 'denationalize'. Not having Russian books to hand, and not being familiar with Russian holidays and Easter, these were included with information about agriculture and on Czechoslovakia, Russia, the Carpathian Russia and Chervonnaja³⁴.

According to the members of the Pedagogical Bureau, many migrants showed an indifferent and naive attitude to the denationalization of the young generation. It was necessary to implement «a great collective work that created the pathos and shaped the national sentiment, in a real and living thing, that was undoubtedly developed in potential form in most Russian emigrants. Then one could find the means to fight against the denationalization of the young generation»³⁵.

Worrying about the information collected, the Pedagogical Bureau proclaimed that

The fracture that can occur between Russia and us is to be feared. We must not only commit ourselves to the immediate future at hand, but also prepare for that moment when fate allows us and our children to return to Russia. Imagine the situation of young Russians who will mangle their mother tongue or not speak Russian at all. Either it will not be possible for them to return and the knowledge they have acquired, so necessary for building a new life, will be lost to them; or they must endure such moral suffering, feel their detachment from everything native and, perhaps, be mocked by their compatriots³⁶.

For this reason, the Pedagogical Bureau believed that, in addition to the development of the Russian schools abroad, it was also necessary to implement forms of extra-curricular education for children not attending Russian schools in order to preserve the use of the mother tongue. To achieve this aim, it believed it advisable to disseminate widely the materials from the Congress of the Higher and Lower Russian School Abroad (April 1923), and plenary meeting of the Pedagogical Bureau (July 1924) concerning measures against the Russian denationalization of the emigrant children, aiming especially at Russian

³³ «Falcons» – was founded in 1862 as Czech gymnastics group, it later evolved into a Czech nationalist group inspired by Panslavism.

³⁴ *O merach borby protiv denacionalizacii russkich beženskich detej. Doklad P.D. Dolgorukova Soveščaniju Ped. Bjuro 4 okt. 1924 g.*, cit., pp. 10-11.

³⁵ *Ibid.*

³⁶ *Ibid.*, pp. 12-13.

organizations abroad which were participating in the education of Russian youngsters, and several school institutions. The press was also to be involved in the fight against the denationalization of young Russians, illustrating examples of loss of the national identity by the young generation and methods to combat it³⁷.

During the Pedagogical Bureau Conference in October 1924, a member of the Presiding Committee, Dolgorukov, gave a report of the various initiatives undertaken to fight against what was defined the denationalization of Russian schools abroad. The conference was attended by the Presiding Committee and the members of the Office, some members from France among whom was V.V. Rudev, President of the *Zemgor Komitet*³⁸.

On the basis of the information on the increase of this phenomenon in a series of countries where the Russian emigrants lived, in particular in France, Belgium and Germany, the Pedagogical Bureau recognized unanimously that it was becoming serious and required the coordination of measures by social organizations, family and school. The Conference advocated a wide-reaching information campaign through the press about the impending danger and an indication of the measures taken to combat it, and proposed to create a national cultural association of the «Slavic network» (*Slavjanskaya matica*) type by appointing the Pedagogical Bureau to present a draft statute for a similar organization in view of the next pedagogical Congress. The Conference recognized that «the Russian school abroad was the most effective means of combating denationalization» and that «reviewing teaching programmes was essential in order to consider the meaning of various disciplines in the system of national education». The different types of general education schools had to take account of local contexts³⁹.

The Conference recognized that strategies for combating denationalization might vary according to local contexts and provided for the creation of forms of school and extra school education (kindergartens, clubs, youth clubs of different types), including a series of cultural activities; the intensification of literary activity in the field of publication of classics and children's literature; the conservation of native life forms (*rodnoj byt*) linked to Orthodox religious holidays (Christmas Tree, Easter and *Trojca*); organizing children's parties linked to some significant date (Pushkin's day, peasant liberation day); the organization of boarding schools and residential camps for children who were left without a family after emigration or were alone during the day; the establishment of the «godchild» (*krestniki*) as a form of tangible moral support for orphaned children; sports clubs and leisure organizations like the Sokol'stvo and Scouting. Finally, since the organization of the Festival of Russian Culture

³⁷ *Ibid.*, p. 13.

³⁸ *Rezoljucii Soveščanija po bor'be s denacionalizaciej*, in *Soveščanie po bor'be s denacionalizaciej sozvannoe Pedagogičeskim Bjuro po delam srednej i nižšej russkoj školy zagranicej*, cit., pp. 4-5.

³⁹ *Ibid.*, pp. 4-5.

was still premature, it was postponed to the II Pedagogical Congress of the following year⁴⁰.

All these initiatives would allow children not to forget the Russian language and to return to the homeland when the Soviet regime permitted. But the Soviet school reforms' utopian character only emphasised the migrants' equally utopian hope of return.

3. *The reform of the Soviet schools viewed by the Pedagogical Bureau of Prague*

The Russian specialists at the Pedagogical Bureau of Prague presented their first reports on the ongoing Soviet reforms during the conferences of representatives of the Russian schools abroad and later in the journal «The Russian school abroad». Among these specialists, Andrey I. Pavlov and Alexander Bem appreciated the first reform of the United Labour School set up by the October revolution, espousing the twin concepts of work and social unity, but harshly criticized the subsequent reforms that eroded the revolutionary principles and adopted somewhat inadequate methods given the state of Soviet schools⁴¹.

The United Labour School law (October 18, 1918) proclaimed that the Soviet school was supposed to be united, mixed, secular and free, based on work for all children from 8 to 17 years. But soon the Soviet government was forced to reduce the general compulsory education project to a seven-year cycle (four years of elementary school and three years of secondary school)⁴².

The Soviet school reform was analyzed from the point of view of structure and content by Aleksandr Bem, member of the Presiding Committee of the Pedagogical Bureau of Prague, during a meeting on July 16, 1924⁴³. Bem discussed the Soviet reform, on the subdivision of the work school levels, passed

⁴⁰ *Ibid.*, p. 5.

⁴¹ See the archival collection of documents by M.N. Kuz'min, V.P. Dmitrienko, Ju.S. Borisov (edd.), *Russkaja škola za rubežom. Istoričeskij opyt 20-ch godov. Sbornik dokumentov*, Sost. V.A. Vladykina, T.Ju. Krasovickaja, Moskva, Institut nacional'nych problem obrazovanija (INPO), 1995; Mchitarjan, *Das «russische Schulwesen» im Europäischen Exil*, cit., pp. 62-63.

⁴² These aspects have been analysed in detail by S. Fitzpatrick, *The Commissariat of Enlightenment: Soviet organization of education and the arts under Lunacharsky, October 1917-1921*, Cambridge, Cambridge University Press, 1970, pp. 26-33 and L.E. Holmes, *The Kremlin and the schoolhouse. Reforming education in Soviet Russia, 1917-1931*, Bloomington, Indianapolis, Indiana University press, 1991, pp. 7-24.

⁴³ A. Bem, *Plan novoj reformy sovetskoj školy vtoroj stupeni. Doklad na Plenum Pedagogičeskoe Bjuro v Prage, 16 julija 1924 goda*, Praga, Izdanie Pedagogičeskogo Bjuro, 1924. On the criticisms expressed by Bem see also Mchitarjan, *Das «russische Schulwesen» im Europäischen Exil*, cit., pp. 65-66.

on August 4, 1922. The reform involved a subdivision according to which there were three types of schools: a) the *četyreletka*, comprising a four-year, first-level curriculum, for children aged from 8 to 12 years; b) the *semiletka*, a seven-year school including the first part of the second-level curriculum, for children aged between 12 to 17; c) the *devjatiletka*, a nine-year school comprising the first level and two curricula for the second level, for children from 8 to 17 years⁴⁴.

In practice, according to Bem's analysis, this reform retained two levels (nine school years remained on paper) and obliterated the United Labour School as created in the wake of the October revolution in favour of the introduction of the middle school (the so-called *nepol'naja srednaja škola*). The difference consisted in the fact that the new reform instigated a compulsory seven-year general and middle school with two separate curricula which offered a different educational curriculum, instead of the previous subdivision into «humanitarian and royal» (*gumanitarnaja* and *real'naja*) school – which included a course of general studies (elementary and middle) that granted access to higher education. The first of the curricula, lasting three years, provided knowledge and skills which allowed the teenager of 13-15 years «to find his way in the phenomena of nature and social life and to organize his life and his work in a rational way». The second curriculum, also of three years' length, was aimed at adolescents of 16-17 years who wanted to specialise into a particular field of knowledge, although in reality this could be accomplished by nine school years in preparation for higher education.

However, due to the priority given to the seven-year school by the Soviet reforms and by the education theorists who followed these reforms with heated debates on polytechnic education, Bem considered this seven-year school as a middle school for children aged between 8 and 15 years, which would have become a school for all. Bem's implicit criticism was most likely that it would not have been a real school for all but a school, which educated citizens in accordance with the regime, and was therefore reactionary for the political purposes underlying the Soviet 7-year middle school education project.

Even though he mainly emphasised the differences between two types of school – mass and proletarian – to illustrate this reform, Bem was referring to two authors who expressed two different positions concerning the methods to be adopted to achieve reform (abolishing traditional school subjects): Al'bert Pinkevič (1884-1939) and Nadežda K. Krupskaya, Deputy Education Commissioner and also Lenin's widow. The theorist Pinkevič, who was more moderate concerning polytechnic education trends, shared the idea that the main subjects should include «man as the subject of work, nature as its object, technique as a systems of ways of influencing his nature, finally, the organization of people's work in the past and present – these are, so to speak, the main

⁴⁴ Bem, *Plan novoj reformy sovetskoj školy vtoroj stupeni*, cit., p. 4.

‘school subjects’ of the new programme»⁴⁵. According to Pinkevič the study of man should not be understood as the study of man as ‘human machine’ but as the study of his peculiarities amongst which one should indicate art, which was to occupy a prominent position in the new State.

Before addressing the question of the methods needed to achieve the new school, N.K. Krupskaya stated that the second school level should not be closed «like the fortress of the bourgeoisie» (nor replaced in the Soviet Union by workers’ schools) but had to meet the needs of the proletarian State: «middle school would become a mass school and not be simply like preparatory classes for higher education institutions»⁴⁶.

With the expression «middle school», Bem was ahead of his time. He was referring to the fact that in European States it was an institution reserved for those who wanted to access higher education, while the Soviet State was supposed to be providing a Communist education comprising early vocational training. Krupskaya indeed believed the following about the seven-year school or *semiletka*:

the first block of the second level is supposed to prepare pupils for real life: providing the necessary skills, organizational abilities and work-related knowledge for life, all of which are necessary for everyone to learn to specialize – in whatever area – to organize their private lives and to be able to socialize properly». To reach this goal, the school would have to «break with all the old traditions, develop for itself completely different curricula, other working methods»⁴⁷.

The new seven-year school programme which was to be implemented under the ‘study of work and its organization’ project – i.e. using projects methods – was also sharply criticized by Bem; he stated that «in N.K. Krupskaya’s project we encounter, at best, pure utopia; at worst, an experiment that can damage an entire generation of children»⁴⁸.

The methods of theme-based learning indicated that around the subject of work, for example, one should develop activities in Russian language, arithmetic, geography and history. All the knowledge in the curricula was divided into three sections: i. nature, its wealth and strength; ii. use of wealth and human

⁴⁵ *Ibid.*, p. 7.

⁴⁶ *Ibid.*, p. 5.

⁴⁷ *Ibid.*

⁴⁸ *Ibid.*, p. 6. The Project Method, developed by the educationalist William H. Kilpatrick (1871-1965), abandoned traditional school subjects, replacing them with a learning project around which knowledge had to be organized. See also D. Caroli, *I quaderni di scuola e la didattica della lingua, della letteratura e delle scienze naturali in Russia e in Unione Sovietica (1860-1940)*, in D. Montino, J. Meda, R. Sani (edd.), *Quaderni di scuola. Studi e ricerche su un mezzo di educazione di massa in età contemporanea* (Proceedings of: *Quaderni di scuola. Una fonte complessa per la storia delle culture scolastiche e dei costumi educativi tra Otto e Novecento* (Macerata 26-29 settembre 2007), Firenze, Polistampa, 2009, vol. II, pp. 1049-1084.

forces. iii. social life. One particular theme, which is dealt with in the course of a year, was to lie at the base of each programmed year of teaching⁴⁹.

In Krupskaya's ideal, the notion of human work acquired a more limited meaning because on the one hand it was to be partly replaced in schools by the so-called 'propaganda of production' and, on the other hand, by the education of class consciousness. According to Bem, instead, the very idea of teaching with the project method in pure form could be allowed with younger children (though in partial form with traditional materials), but was not adequate with older pupils, indeed it was criticized even by some Soviet pedagogues⁵⁰.

Bem described as monstrous that, during the first level of schooling, pupils should learn content without the subdivision of topics into traditional school subjects. He criticized the fact that it was not stated clearly how to complete the second-level curriculum in accordance with the project method (especially for mathematics), as if in some cases subjects were not going to disappear after all. Bem defined it as «a craze for the project method» on the part of «irresponsible authors of projects, who hold public education in their hands, and have totally lost touch with reality»⁵¹. In addition, a condition for implementing the new programme was the availability of teachers capable of achieving the recommended method. Bem argued that:

Even with a cursory glance at the contents of the diagram, it is clear that there are not the teachers with such encyclopaedic knowledge, and that we need to educate a new generation of educators [in Russian *pedagogi*], specially prepared for the proposed education system. There is a danger that with the semi-educated youth that the Soviet schools currently produces, school will manage to make people completely ignorant, having only fragments of knowledge grabbed randomly and quite unsystematically. The perverse influence of the school also emerges in that spirit of adhesion to the new power, which the scheme strives to inculcate. The whole section on 'social life' has making the pupil a faithful Communist as its ultimate goal. The 'bourgeois school' has never yet arrived at such a system consequent of and directed at the school's transformation into an instrument of its domain. This adaptation of school for the provisional purposes of Government leaves a particularly repulsive impression on the new schema. The union of educational form based on the project method – although not applicable as a whole – together with the primitive use of the school for the aims of the regime, is the most characteristic trait of new scheme⁵².

According to Bem, the mixing of an idea of progressive pedagogy with the reactionary task of creating a school for a particular social class was typical of Soviet pedagogy. He continued, saying that «it is within this that we find hidden the temptation of Western educational reformer, who fails to see the reactionary substance of Soviet pedagogy beneath its progressive patina»⁵³.

⁴⁹ Bem, *Plan novoj reformy sovetskoj školy vtoroj stupeni*, cit., p. 7.

⁵⁰ *Ibid.*

⁵¹ *Ibid.*, pp. 10-11.

⁵² *Ibid.*, p. 11.

⁵³ *Ibid.*

This reactionary accusation aimed at the Soviet system because of its class character was not the only one. Bem was criticizing a system that actually wanted to mould citizens with the new Communist identity. However, in practice, it was a school whose methods were unable to provide a decent level of education. In this regard, during the II Congress of Representatives from the Russian School Abroad the following year (1925), Andrey I. Pavlov criticized the lack of statistical data for the period 1917-1921 (equivalent data for the school census of January 1911 was however available and published in the years 1913-1914) to indicate that the new regime not only had not improved but had actually worsened the achievements of Russian education. The lack of statistical data made it impossible to ascertain the real increase of expenditure of education in relation to that of the pre-war period of 1908-1914, when the Russian Education Ministry devised a project for general and free primary education, financed by local administrations and the State budget⁵⁴.

In his article, Pavlov illustrated how the main pillars of revolutionary reform – the realization of compulsory education, free education, and state control of expenditure for education, had crumbled one after another during the periods of war communism and that of the New Economic Policy (NEP)⁵⁵. The 1918 statute of the United Labour School had included all these principles for the democratization of school, and «recognized the principle of individuality – i.e. the right to allow each personality his own development». It also introduced the comprehensive self-management of schools with the participation of the population and the later law passed on October 15, 1921 even made allowance for private initiatives⁵⁶. Furthermore, although sources mentioned an increase in expenditure from the State budget for education from 7.2% in 1914 to 10.4% in 1920, this figure had no real meaning because the funds from the miserly local budgets came from the central administration. On 1 January 1914, there were 62,000 schools attended by 4,200,000 children, while in 1921 the data was contradictory because of on-going administrative divisions. According to the Russian Statistical Direction, there were 74,000 first-level schools with six million pupils. According to other calculations, on January 1 1921, there were 76,052 first-level schools with 6,067,000 pupils in the Russian Republic, and 3,719 second-level schools with 407,000 pupils⁵⁷.

In the second phase of the New Economic Policy (1921-1927), the two principles of free education and transfer of school expenses to the State collapsed because of the country's precarious financial state: the People's Commissar for Enlightenment was forced to introduce a fee for attending the first- and second-level schools. For this reason, from 1922/1923 onwards, a campaign

⁵⁴ A.T. Pavlov, *Očerk politiki načal'nogo obrazovanija v Sovetskoj Rossii (Doklad na 2-m S'ezde dejatelej zarubežnoj školy)*, «Russkaja škola za rubežom», n. 15-16, 1925, pp. 255-276.

⁵⁵ *Ibid.*

⁵⁶ *Ibid.*

⁵⁷ *Ibid.*

of contracts was begun according to which schools had to be maintained by the local population. The costs for renovation of school buildings were not provided, so local administrations, in the absence of adequate premises, used makeshift premises. In addition, the social origins of children did not match the desire to create a school for the proletariat and poor peasants: in fact the attendance of peasant children was not widespread, but was higher among those from the more prosperous farms (and who had horses to take them to school)⁵⁸.

A reduction of the school system to a total of 40,000 schools with three million pupils occurred in 1924/1925, with the result that seven out of ten children were left without any education. The school designed for 34 million children to attend was only attended by 10-12 million, for a variety of material reasons. «The school is not attended because pupils do not have shoes and in winter, schools are not heated. The population did not think highly of schools because they are so badly equipped that they believe learning to be impossible. An exercise book costs five *funt* of rye, a pencil ten, and a primer an entire *pud*»⁵⁹.

Despite improvements in the local budget starting the year after, the plan to introduce compulsory education was postponed to 1934⁶⁰. Pavlov concluded his essay on the status of teachers in Russia, whose salary of 360 roubles was a quarter of that earned by their European counterparts, and who had been transformed into educational workers (*škrab*). The teacher was

a slave of the local institution of education and culture, which exploits him. The teacher is a slave to a political education and instruction and inept political judgements, when these checks are not carried out by competent individuals with an understanding of politics and the Party. The teacher is a slave in the school with its smashed windows and broken benches, with no pupils and no textbooks⁶¹.

Teachers' working conditions were further exacerbated by pay delays of two or three months and by the so-called campaign of contracts under which local authorities were forced to introduce school fees. Until 1924, this still went on in 17 provinces, where 50% of teachers were paid under the contractual conditions. Until the years 1922-1923, in some places the salary could be in kind (6-30 *pud* of wheat per month). The following year, teachers also complained about classroom overcrowding (100 or more pupils per teacher) and the difficulty of combining teaching with social work. And as if to add insult to injury, the Soviet press led a crusade against female teachers, 'daughters of the priests',

⁵⁸ *Ibid.*

⁵⁹ A *Funt* is 409.5 grammes (just under a pound); a *pud* is 16.38 kilos (36 pounds); *ibid.*

⁶⁰ *Ibid.*

⁶¹ *Ibid.*

who lived under the constant threat of an inspector's negative appraisal that could lead to their dismissal⁶².

The Soviet school reform was therefore a paradox. On the one hand, the seven-year school was intended to become a mass and revolutionary school with its transformation into a 'middle school' thanks to the abolition of school subjects and the adoption of the project method. Yet while it proclaimed itself a school for the education of the masses, Bem considered it reactionary because of its covert political aims. However, despite his sharp criticism, Bem did not realize that this reform was actually a first step back to the Marxist ideal of the polytechnic, which postponed specialized education to after the age of 17 but introduced an earlier work-oriented education.

These reflections on the seven-year school did not actually reflect the status of Soviet schools, where most children had difficulty attending elementary school because of poverty. However, the repercussions of these debates on the United Labour School and middle school proved significant for some individuals, including the philosopher Sergey Hessen who was known for his ideal of a modern school rooted in universal contents and methods, which was to be important for other European school systems such as that of post-war Italy.

4. *The philosopher of education Sergey I. Hessen from Prague to Warsaw: the search for the modern school*

Sergey I. Hessen (1887-1950) was prominent amongst the Prague emigrants because of his cosmopolitan educational ideals and the theories he developed in the field of educational policy after World War II⁶³.

⁶² *Ibid.*

⁶³ Born in Ust Sysolsk (Syktykvar) in the province of Vologda, he attended the gymnasium in St. Petersburg; in 1905 he moved first to Berlin, then to Heidelberg where he studied philosophy and, in the years 1906-1909 in Freiburg, where he attended the lectures of the neo-Kantian philosopher Heinrich Rickert (1863-1936) and the historian Friedrich Meineke (1862-1954). After graduating with Rickert, he returned to Saint Petersburg, often going to Moscow because of the review «Logos» and of his many cultural exchanges with philosophers. From 1910 to 1914 he prepared his *Magister* degree in philosophy, and made numerous trips abroad. In 1914 he became *Privat Dozent* in Saint Petersburg and also spent the war years there where he turned to the group of social-democrats, close to the legal Marxism of Plekhanov, with whom he had occasion to discuss his ideas. In September 1917, he moved to Tomsk with family to teach at the University. During this intense period, he outlined the *Fundamentals of pedagogy (Osnovy pedagogiki)*. In the post-revolutionary years, he moved to Saint Petersburg, to the «A. Herzen» Pedagogy Institute, living in very difficult conditions, which led him to move first to Finland before emigrating to Berlin, where he finished the draft of his work in progress, which was published in 1923. He spent a period in Jena, where he conducted research on the history of liberalism and socialism. In 1936 he emigrated to Warsaw, where he taught at the University in the war years and, in the immediate post-war period also in Łódź. He died in 1950. The legal literature by Sergei Hessen has been

His ideal of the nation, intended as the epitome of universal values, led him to work on a particular vision of the world even before his forced emigration to Prague at the beginning of the nineteen-twenties. Educated in Germany as a neo-Kantian jurist, he returned to Saint Petersburg and, while preparing his Master's dissertation in philosophy, gave lectures on pedagogy. In 1916 he published an essay on *War and Nations* in which he criticized national chauvinism in favour of the respect for a «transcendental national culture»⁶⁴. In this essay, he argued that

*being a citizen of the world was only possible through immersion in the national tradition, losing oneself in it and at the same time understanding its human signification. And, vice versa, that being a true citizen amongst one's own people is possible only by attempting to realize in through the ideals of humanity, i.e. to contextualise it within the wider sphere of cultural humanity. Only then will the nation cease to be a brute fact, will its existence receive a particular individual thought, will it acquire a historical vocation. For this reason not only are true cosmopolitanism and true nationalism not in contradiction with each other but they need one another. What can be more national and at the same time more human than Goethe and Pushkin? That which is more human is all the more national, and vice versa. Real cosmopolitanism and real nationalism coincide*⁶⁵.

Furthermore, Hessen argued that «the inclusion of the national tradition in the conciliatory tradition – was the transcendental moment of the nation». Thus, neither the cosmopolitan nor the nationalist had any reason to exist unless he distinguish the phenomenon and the essence: «the former fails to see the essence (the eternal values), the latter stealthily replaces eternal values with current reality»⁶⁶.

In his critique of nationalism, Hessen indirectly defended a theory of education that combined national and eternal human values. His conception was further developed in the work *Foundations of pedagogy* (*Osnovy pedagogiki*, 1923), translated into several European languages in which he expressed his ideal of a national education. When he was in Berlin, he was invited to collaborate with the magazine «Russian school abroad», where he presented his candidacy as a Professor of education at the Pedagogical Institute in Prague.

A recent study of *Foundations of pedagogy* by E.G. Osovsky and S.V. Kulygina, reveals Hessen's method of analysing the pedagogical process. Hessen uses «the dialectic triad that reflected the features of pre-school childhood, of

rediscovered recently in Russia: S.I. Gessen, *Izbrannye sočinenija*, Moskva, Rosspen, 1999. For his autobiography, see *Moe žizneopisanie*, *Ibid.*, pp. 723-782. See also the translation into Italian: S. Hessen, *Autobiografia. La pedagogia russa del XX secolo*, edited by L. Volpicelli, Roma, Avio-Armando Editore, 1956, pp. 9-62.

⁶⁴ S.I. Gessen', *Ideja nacii*, in M.I. Tugan-Baravovskij (edd.), *Voprosy mirovoj vojny. Sbornik Komiteta po ustrojstvu etapnago lazareta imeni vysšich' učebnych' zavedenij Petrograda*, Petrograd, Pravo, 1915, pp. 562-589.

⁶⁵ *Ibid.*, p. 582.

⁶⁶ *Ibid.*, p. 583.

the nursery school period and period after school. The first is characterized by the predominance of natural factors, the second by the acquisition of social norms, and the third, the formation of the 'self', of personal convictions and of inner individual freedom». To this end, Hessen devised his idea of the unity, wholeness and diversification of education, «proposing degrees of differentiation of local history (in elementary school), psychology (the middle class) and vocational orientation (upper level)»⁶⁷, that led him to study «the regularities and paradigms of development of different peoples in contemporary educational systems, with particular attention to cultural aspects that condition education and teaching»⁶⁸.

He moved to Prague in the spring of 1924, and taught at the Pedagogical Institute in the city, participating in debates on Russian elementary and middle school curricula abroad, especially regarding the Russian language⁶⁹. He lectured in several foreign institutes in Paris, Berlin, Warsaw, Cracow, Vilnius, Revel, Kovna, Riga, Cambridge and London, working with the magazines «Sovremennye zapiski» and «Erziehung». In a 1925 essay he defined the first phase of the Soviet school as “Communist anarchist” due to the utopian project of change it was introducing⁷⁰; in others he deplored the progressive abandonment of the United Labour School introduced by the October revolution in favour of a “regime” school system⁷¹, that is without opening the mind to the values of a cosmopolitan citizenship. By 1928, during his period of emigration in Prague, he began studies into comparative pedagogy and entered into correspondence with the well-known Italian pedagogue Giuseppe Lombardo Radice (1879-1938)⁷², whose ideals were at the basis of the Fascist school reforms, formulated by Giovanni Gentile, which were to influence on Hessen during the Thirties⁷³.

⁶⁷ E.G. Osovskij, S.V. Kulgyna, *S.I. Hessen – Vidnyj pedagog i filosof Rossijskogo zarubež'ja* (1887-1950), in E.G. Osovskij, N.I. Enaleev (edd.), *Obrazovanie i pedagogičeskaja mysl' Rossijskogo Zarubež'ja: Tezisy Vserossijskoj naučnoj konferencii po proektu “Nacional'anaja škola v Rossii”*, Saransk, 1-2 nojabrja 1994 g., Saransk, Meždunarodnyj Fond “Kul'turnaja Inicijativa” MGPI im. M.E. Evsev'eva, INPO MO RF), 1994, pp. 38-40 (see pp. 39-40).

⁶⁸ S.V. Gračev, *S.I. Hessen o nacional'nom obrazovanii*, in Osovskij, Enaleev (edd.), *Obrazovanie i pedagogičeskaja mysl' Rossijskogo Zarubež'ja*, cit., pp. 41-42.

⁶⁹ *Otzyv professora S.I. Gessena o doklade Karcevsckogo “o neobchodimosti korennyh izmenenij v prepodavanii rodnogo jazyka” (14 julja 1924 goda)*, in Kuz'min, Dmitrienko, Borisov (edd.), *Russkaja škola za rubežom*, cit., p. 75.

⁷⁰ S.I. Hessen, *Evoljucija edinoj trudovoj školy v sovetskoj Rossii*, «Russkaja škola za rubežom», n. 15/16, 1925, pp. 226-241.

⁷¹ S.I. Hessen, N.F. Novožilov, *Desjat let sovetskoj školy*, «Russkaja škola za rubežom», n. 28, 1927/1928, pp. 473-520; S.I. Hessen, N.F. Novožilov, *Školnaja politika sovetskoj vlasti za 1927-1930gg.*, «Russkaja škola za rubežom», n. 34, 1929/1930, pp. 385-420.

⁷² The correspondence between Hessen and Lombardo Radice is held in the Archival Funds of the Istituto Nazionale di Documentazione, Innovazione e Ricerca Educativa (INDIRE) in Florence. This documentation will be analysed in special study on Sergei Hessen.

⁷³ L. Cantatore, *Lombardo Radice Giuseppe*, in G. Chiosso, R. Sani (edd.), *DBE. Dizionario Biografico dell'Educazione 1800-2000. Volume II (L-Z)*, Milano, Editrice Bibliografica, 2013, pp.

Hessen was invited to Warsaw in the spring of 1933 by the Association of the New Education Association and by the Free University of Poland (*Volna Wszechnica Polska*). While there he also published a detailed study on the fifteen years of Soviet reforms, divided into two main periods – the Communist anarchy of the early revolutionaries and the New Economic Policy – with a particular focus on the economic basis of the Soviet system⁷⁴.

In his 1939 work, *Russian pedagogy in the 20th century*, he described the history of Russian educational thought from the late 1800s to the Communist pedagogy. Obviously not avoiding controversy, he criticized Communist pedagogy and its utopian vision of school, and ‘sociologism’ (i.e. the particular influence played by the environment) in education⁷⁵. In fact, his starting point was «not the concept of objectively meaningful duty, but the concept of unconditional value and of culture, as realization of unconditional values in history. Man’s relationship to value is a *sui generis* relationship; it is quite different from the relationship of causal necessity, a relation which determines the existence of man as a natural being (psycho-physical organism), as it also is from the relationship of power obligations, which determine the existence of the human being as a member of the social group. Value does not force man in the same way that cause does not force him to power, but invites him to recognize it with his own free will and achieve it in life. Its characteristic is not necessity (*Müssen*) and not obligation (*Zwang*), but an unconditional significance (*Geltung*) which helps moral obligation. In his relationship with value, man behaves not as a physical body and not as a member of a social group, but as a free personality. The concepts of freedom and value are joined»⁷⁶.

While in his early studies Hessen did not use «the word ‘spirit’ to indicate the world of culture and of history», he passes from H. Rickert’s neo-Kantian positions to those of Gentile in order to work out the difference between upbringing and education (*vospitanie* and *obrazovanie*): «up-bringing (*vospitanie*) is a process of growth and formation of man’s psycho-physical body, while education (*obrazovanie*) is a process of formation of the human personality; furthermore it is also a simultaneously a growth of its creative freedom and an initiation to its cultural values. According to Hessen, «up-bringing» is a natural condition of «education», since personality as spiritual beginning emerges in the psycho-physical organism, and settles upon it as its

43-45.

⁷⁴ S. Hessen, N. Hans, *Fünfzehn Jahre Sowjetschulwesen. Die Entwicklung des Sowjetschulwesens und die Wandlungen der kommunistischen Bildungspolitik seit der Oktoberrevolution bis zum Ende des Fünfjahresplanes (1917-1932)*, Berlin-Leipzig, Verlag von Julius Beltz in Langensalza, 1933.

⁷⁵ It was possible to consult the typewritten version held in the Archives of the School of Slavonic and East European Studies Library at University College London: Hessen Collection (circa 1935-1950); S. Hessen, *Russian Pedagogy of XX century*, Warsaw, [typescript], 1939, pp. 1-72.

⁷⁶ *Ibid.*, pp. 50-51.

highest layer of existence. In the same way that up-bringing is the object of study of physiology and physiological psychology, education is the object of study of pedagogy as applied philosophy. If philosophy is the science of values in their timeless value, pedagogy is the science of the realization of such values in the subject, of the growth of objectives and tasks in the process of personality formation and its integration into the tradition of the culture, because values acquire the character of educational tasks in the process of personality growth»⁷⁷.

These principles, even with a new ideal of upbringing and education, were also the basis of an important work on the modern school written in 1933 that resulted in the volume *Structure and content of the modern school (Struktura i treść szkoły współczesnej)* which was destroyed during the first bombing of Warsaw, before it reached the printing presses⁷⁸. In four chapters, Hessen dealt with the significance of the United Labour School, elementary education as a form of global teaching, the essence and limits of interdisciplinary teaching, the integrity of second- and third- level instruction, the integrated vocational school as a third level of compulsory schooling, concluding with compulsory schooling. In these chapters, Hessen presented «the tasks and their particular teaching principles at every level of the school system, tasks arising from the new structure that the school has taken on as a united school»⁷⁹. Thanks to his scientific interests in pedagogy and the Italian school system⁸⁰, Hessen's work was translated into Italian in the nineteen fifties and sixties, and made an important contribution to the political debates surrounding school reforms⁸¹.

In 1949, Hessen participated in the Universal Declaration of Human Rights, in which he stressed the mutual bonds linking the human and national dimensions in the culture and education of all Nations⁸². For him, cosmopolitanism and nationalism came together in the defence of the human right to education, the very right that resulted in the middle school gaining ground, being introduced in the Soviet Union in the 1950s and in Italy in the early 1960s.

In conclusion, the Russian schools abroad with their marked national content were conceived to foster in emigrant citizens a strong Russian identity and sense of belonging, in preparation for return to the motherland. In the various countries where these schools were weaker, Russian emigration

⁷⁷ *Ibid.*, pp. 51-52.

⁷⁸ This volume was published in reworked form in 1947. The following edition was consulted: S. Hessen, *Struttura e contenuto della scuola moderna (Principi della didattica nuova)*, Roma, Armando Armando Editore, 1966 (6th ed.).

⁷⁹ *Ibid.*, p. 239.

⁸⁰ See for example S. Hessen, *Die scuola serena von G. Lombardo-Radice*, «Die Erziehung», 6, 1931, pp. 533-554; Id., *Die pädagogik Giovanni Gentiles*, «Die Erziehung», n. 9, 1934, pp. 401-422 and n. 10, 1934, pp. 479-490.

⁸¹ Hessen, *Autobiografia. La pedagogia russa del XX secolo*, cit., pp. 44-46.

⁸² S.V. Grachev, *S.I. Hessen o nacional'nom obrazovanii*, in Osovkiĭ, Enaleev (edd.), *Obrazovanie i pedagogičeskaja mysl' Rossijskogo Zarubež'ja*, cit., pp. 41-42.

agencies tried to develop other forms of education in an attempt to combat the denationalization of children and young people. The Russian emigrant *intelligencija* they kept track of Soviet reforms because of their intention to return home, but criticised them fiercely. They deplored the abandonment of the revolutionary united school and the excessive political orientation, which they even considered reactionary due to the lack of freedom that characterized the Soviet educational system. The Second World War dashed all hope of the exiled Russians' return and Hessen himself, who had defended higher values than mere cosmopolitanism and nationalism, found himself proposing a unified modern school, a school suitable for democratic society.

The functionalization of history and social studies education in Germany from the 19th century until today

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ABSTRACT: Ever since the 19th century, History classes and later Sociology classes have been accorded an important function in regard to the socialisation of pupils – no matter what kind of social order dominated society. The paper analyses the functionalization of History and Social Studies Education from the foundation of the German Empire in 1871 until the time of National Socialism with an outlook to the time after 1945 until today. Not only decrees and curricula are analysed, but also school wall charts, because these have not been put into the focus of research as much as they deserve. As so far there has not been a total list of all school wall charts in Germany, looking at the available teaching aid catalogues helps to find out which wall charts existed. At the end four wall charts about the Battle of the Teutoburg Forest from different times are shown.

EET-TEE KEYWORDS: History of Education; History; Teaching; Socialization; Principles of Education; Curriculum; Wall Maps; Germany; XIX-XX Centuries.

Introduction

Since the beginning of the 18th century, History was recognised as an own subject in many schools of higher education in Germany. Initially, however, only in protestant schools as in catholic schools, which were often headed by Jesuits, the plan of studies *Ratio atque institutio studiorum* from 1599 was still in place, which either touched History in connection with Latin and Greek, or as part of Rhetorics¹. It was general belief that one could learn from History

¹ J. Dolch, *Lehrplan des Abendlandes*, Darmstadt, Wissenschaftliche Buchgesellschaft, 1982, pp. 240, 242, 290, 322.

«the ability to judge character» and «human happiness». History was also believed to awaken patriotic feelings and that it taught political wisdom².

In the course of the 19th century, History also became an own subject in lower education, or at least became part of the so-called «Realities» (*Realien*), which covered Natural History, Geography and History. In this field of lower education, History was supposed to cater for the current needs, practical lessons should be learnt from History. In higher education, History was meant to represent the various epochs by comparison in its diversity. This should then lead to a critical appreciation of one's own present. Wilhelm Hoffmann stated that the 19th century was not able to clearly differentiate these two views. «In reality, the differences were blurred and it was believed that it was possible to combine all previously mentioned approaches despite their differences in origin. This way it was not possible to shape the goals of History Education in a convincing way and to develop a sound methodological way»³.

Furthermore, Germany had and still has no uniform school system. Even after the foundation of the German Reich in 1871, the individual states still had the say in cultural matters (*Kulturhoheit*). This meant that they were in charge of all different school types and their curricula – often still in collaboration with the church. Due to its size, Prussia – it goes without saying – had a much bigger influence in the education sector. Since 1871, the Prussian king was also German emperor at the same time. In the Weimar Republic, factually nothing changed with regards to controlling culture and education, despite the fact that the Weimar Constitution strengthened the power of the *Reich* over its individual states. This also affected the school sector. According to Christoph Führ, the collaboration of the ministries of education and culture of the individual states brought about some alignment in some areas of the school system, yet it did not lead to the intended school reform. At the end of the Weimar Republic, the German school system and teacher training was more fragmented than at the beginning⁴. In the time of National Socialism, the state took over control over schools in 1934 and created the Ministry for Science, Education and Public Education (*Wissenschaft, Erziehung und Volksbildung*). This meant that the individual states and their school administrations were no longer partners with equal rights. There were, however, huge differences between the actual and envisioned standardisation of the school system⁵. Since the foundation of the

² F. Günther, *Der Geschichtsunterricht an den höheren Schulen Deutschlands im XVIII. Jahrhundert*, «Neue Jahrbücher für das Klassische Altertum, Geschichte und Deutsche Literatur und für Pädagogik», 10, 1907, pp. 511-536, p. 519.

³ W. Hoffmann, *Historia magistra vitae. Untersuchungen über die Voraussetzungen des Geschichtsunterrichts*, in G. Geißler, H. Wenke (edd.), *Erziehung und Schule in Theorie und Praxis*, Weinheim, Beltz, 1960, pp. 171-184, p. 184.

⁴ Chr. Führ, *Zur Schulpolitik der Weimarer Republik. Die Zusammenarbeit von Reich und Ländern im Reichsschulausschuß (1919-1923) und im Ausschuß für das Unterrichtswesen (1924-1933). Darstellung und Quellen*, Weinheim, Berlin, Basel, Beltz, 1970, p. 19, 120.

⁵ *Ibid.*, pp. 60ff.

Federal Republic of Germany, control over education and culture has stayed with the individual states, in the German Democratic Republic (GDR), the school system was standardised. Since 1989, the new formerly Eastern German states have had control over education and culture.

It is common sense that there is a strong link between State, Society and History Education. History as a school subject is often at risk of being (mis-) used for state or society relevant purposes. This has been proven by publications through time⁶.

The following article will cover this topic. It will also discuss whether wall charts with historical and society relevant topics in History Education have reacted to stately orders and society relevant situations, which have often been referred to as *Zeitgeist*. The focus will be on the late 19th century until 1945. A short outlook to the Federal Republic of Germany and the German Democratic Republic will follow. To conclude, some wall charts from different times covering the Battle of the Teutoburg Forest will be presented.

1. About wall charts

The size of wall charts was different, they were however generally big enough for pupils to be visible in class. They were often, yet not always, painted in colour. According to a teaching aid catalogue (*Lehrmittelkatalog*) from 1914, there were wall charts for the early classes, divided into those for Showing (*Anschaungsunterricht*), Reading and Writing as well as Mathematics. For higher classes, the following wall charts were in use: Religion, Geography, History, Literary History, language classes, Natural History, divided into Microscopy, Human History, Zoology, Botany and Mineralogy, Natural Science (Naturlehre), divided into Physics and Chemistry, Technology, Mathematics, Drawing, Physical Education, Singing and Music and practical lessons⁷. According to Walter Müller, school wall charts were part of the basic and obligatory equipment at public schools in the last third of the 19th century and the first third of the 20th century⁸. At around 1880, wall charts were

⁶ Cf. the overview in K. Bergmann, G. Schneider (edd.), *Gesellschaft, Staat, Geschichtsunterricht. Beiträge zu einer Geschichte der Geschichtsdidaktik und des Geschichtsunterrichts von 1500-1980*, Düsseldorf, Schwann, 1982.

⁷ F. Volckmar, L. Staackmann, *Lehrmittel Nettokatalog*, Leipzig, Berlin, Stuttgart, Albert Koch & Co., 1914, pp. IXff.

⁸ W. Müller, *Methodologische Vorbemerkungen über den Quellenwert von Schulwandbildern für die Zeitgeistforschung*, in R. Stach, W. Müller unter Mitarbeit von R. Binzeisler und J. Koch, *Schulwandbilder als Spiegel des Zeitgeistes zwischen 1880 und 1980*, Opladen, Westdeutscher Verlag 1988 (Forschungsberichte des Landes Nordrhein-Westfalen Nr. 3229/Fachgruppe Geisteswissenschaften), pp. 11-32, pp. 22f.

«showing objects, based on and required by didactical theory»⁹. Even when Reform Pedagogy at the beginning of the 20th century wanted to include real experience into lessons, wall charts remained appreciated means for showing in classes. This can be seen by publication lists of the time. Slides and films were seldom used in school because specific technical hardware had to be used in specially designated rooms which could be darkened. Using wall charts was easy, that is why there were used so frequently. They only had to be hung in the classroom, where they could be studied as long they were referred to in class. They were even used longer when used to decorate the classroom. Only until the end of the 1960s and beginning 1970s did it become standard for all school types that diascope and film players were part of the schools' inventories. The same applied for overhead projectors, which soon became standard for each classroom. Even if some publishers continued to produce wall charts until the 1980s, their use had already declined and today they are practically no longer in use¹⁰.

Texts are being understood and learnt better if images are added. This is not only a common belief but has also been proven by empirical research. It has also been shown that purely decorative images with no link to the text did not bring about any learning improvements. They even distract from the text¹¹. There are no empirical studies on the effect of school wall charts¹². There have been, however, reports on how vividly and with attention to detail more senior people remember school wall charts¹³.

Few school wall charts can still be found in schools and former teacher training facilities (*Lehrerbildungsanstalt*), which were integrated at universities as pedagogy departments. There are school museums like in Dortmund or Ottweiler/Saarland which have collections of wall charts¹⁴. The University

⁹ R. Stach, *Wandbild in Unterricht und Forschung – Vom Handbild zum Wandbild*, in W. Twellmann (ed.), *Handbuch in Schule und Unterricht*, Vol. 4,1, Düsseldorf, Schwann, 1981, pp. 486-497, on history wall charts p. 490; Id., *Hundert Jahre Schulisches Wandbild – Eine Einführung*, in *Die weite Welt im Klassenzimmer. Schulwandbilder zwischen 1880 und 1980*, Bonn, Eine Ausstellung des Landschaftsverbandes Rheinland, Rheinisches Museumsamt, Brauweiler, und der Universität Duisburg Gesamthochschule, Archiv Schulisches Wandbild, 1984, pp. 9-20, p. 9 (quote).

¹⁰ Cf. Stach, *Hundert Jahre Schulisches Wandbild – Eine Einführung*, cit., footnote 9, p. 9.

¹¹ In detail and with literature, cf. E. Erdmann, *preface*, in H. Buntz, E. Erdmann, *Fenster zur Vergangenheit. Bilder im Geschichtsunterricht*, Vol. 1, Bamberg, C. C. Buchner, 2004, pp. 7ff.

¹² «Ein eindrucksvolles Wandbild, das einige Wochen in einem Schulraum hängt, mag zwar nur eine eher indirekte als intentionale Bildungswirkung erreichen, aber man sollte diese nicht unterschätzen». F. Pöggeler, *Bildung durch Bilder: Zur Bildlichkeit der Bildung*, in F. Pöggeler (ed.), *Bild und Bildung*, Frankfurt am Main, Peter Lang, 1992, pp. 331-337, p. 336.

¹³ W. Müller, *Zur Geschichte und Bedeutung schulischer Anschauungsbilder*, in Schulmuseum Bohlenbergerfeld (ed.), *Völkerschau im Unterricht. Schulwandbild und Kolonialismus*, Zetel 1994 (Schriftenreihe des Nordwestdeutschen Schulmuseums Bohlenbergerfeld, Nr. 1), pp. 9-15, in partic. pp. 12ff.

¹⁴ I owe a great deal to the Head of the Westphalian school museum, Dortmund-Martens, Mr Rüdiger Wulf, as well as Mr Arne Timm and Mr. Erik Beck, Universität Dortmund. They

of Würzburg houses the Research Institute for Historical Media at the Chair of Systematic Image Science (*Forschungsstelle Historische Bildmedien am Lehrstuhl für Systematische Bildwissenschaft*), which has the largest collection of school wall charts in Europe. At the moment, the collection is being digitised and therefore not available¹⁵. For that reason, teaching aid catalogues presented a good overview of the production of school wall charts for History and Social Studies Education in order to find out which wall charts existed over time.

2. *From the time of the Foundation of the German Empire in 1871 until the end of World War I*

2.1. *Curricula and Decrees*

After the unification of the *Reich*, there were 25 individual states and the state Alsace-Lorraine, whose control over education and culture was limited. It is important not only to look at Prussia, which was the largest and most influential state, but to also bear in mind other states of different sizes.

2.2. *The Primary School sector*

In Prussia until 1872, «Three Prussian Regulations on the Establishment of the protestant seminary, preparatory and elementary School Education» were proposed by the Head for public schools and teacher training Ferdinand Stiehl at the Ministry of Education and Culture. These regulations unified public schools and teacher training affairs in 1854, as a reaction to the revolution in 1848. Patriotic Education (*Vaterlandskunde*) and Natural Science (*Naturkunde*) were taught – if possible – three lessons per week. If this was not possible, this relevant knowledge was to be taught by the relevant sections in the schoolbook. It was also possible to use one or more lessons on patriotic

not only showed me their collection of school wall charts in the Westphalian school museum and in the chair of History at the University of Dortmund, but also introduced me to the concept of the planned exhibition in January 2015 on wall charts on Germans. Now see the companion volume to this exhibition: E. Beck, A. Timm (edd.), *Mythos Germanien. Das nationalsozialistische Germanenbild in Schulunterricht und Alltag der NS-Zeit*, Dortmund, Westfälisches Schulmuseum 2015 (Schriftenreihe des Westfälischen Schulmuseums Dortmund, vol. 8). Mr Timm, in particular, supported me during my visit in Dortmund and afterwards with many tips. The wall charts of the Saar school museum Ottweiler have been digitised: <<http://www.schulmuseum-ottweiler.net/>> (accessed: October 29, 2014) cf. digiCULT.

¹⁵ <http://www.bildungswissenschaft.uni-wuerzburg.de/forschungsstelle_historische_bildmedien/> (accessed: October 29, 2014). I owe a great deal to the Head of the Research Institute, Dr. Ina K. Uphoff, who has given me valuable information and tips.

holidays for singing patriotic songs or for the teacher to tell stories¹⁶. Stiehl's goal was to build patriotism with History Education built on love towards the dynasty and towards Christianity. This goal resonated well with the intentions of King Frederik William IV of Prussia¹⁷. In Bavaria and Saxony, tendencies can also be traced until the 1860s that the Christian world view was predominant in the teaching of History. Not until later did this change to a more secular world view¹⁸.

In 1872, the «General Orders» brought about a change for primary schools in Prussia. They were signed by the liberal Minister of Education and Culture Adalbert Falk, whose name is closely associated with the Prussian Battle of Culture (*Kulturkampf*). At primary schools, History continued not to be an own subject, but was taught together with the Realities (Geography, Nature Observation and Natural Science). History was restricted to national history. In the middle schools, History was taught as an own subject in the final three years. There, not only national history was taught, but also references to important dates in the history of neighbouring states were referred to¹⁹.

As Prussian King, William II decreed on 1 May 1889 his *Highest Order* to the State Ministry because he wanted to specifically make History and Religious Education responsible to spread 'Godliness' and 'Love for Fatherland'. He did this due to the increase in socialist and communist ideas. On 30 August, the *Suggestions for Execution of the Highest Order* were published. All types of schools (public and middle schools, as well as higher girls' schools) were to teach patriotic history until the coming to power of his Majesty. Mainly at the higher classes, the services of his dynasty to the wellbeing of the public should be stressed. If cuts to the subject matter were necessary, they were not to exclude current history²⁰. In Bavaria, too, the following goals for History Education

¹⁶ F. Stiehl, *Die drei preußischen Regulative vom 1., 2. und 3. Oktober 1854*, Berlin, Hertz, 1864, p. 73. Cf. K.-E. Jeismann, *Die "Stieblschen Regulative". Ein Beitrag zum Verhältnis von Politik und Pädagogik während der Reaktionszeit in Preußen* (1965), in Id., *Geschichte als Horizont der Gegenwart*, Paderborn, Schöningh, 1985, pp. 125-143, pp. 128ff.

¹⁷ *Ibid.*, pp. 139ff. E. Erdmann, *Tendenzen und Neuansätze in Geschichtsdidaktik und Geschichtsunterricht nach 1848 bis in die Mitte der achtziger Jahre des 19. Jahrhunderts*, in Bergmann, Schneider, *Gesellschaft, Staat, Geschichtsunterricht. Beiträge zu einer Geschichte der Geschichtsdidaktik und des Geschichtsunterrichts von 1500-1980*, cit. (footnote 4), pp. 77-103, p. 79.

¹⁸ E. Erdmann, *Die Römerzeit im Selbstverständnis der Franzosen und Deutschen. Lehrpläne und Schulbücher aus der Zeit zwischen 1850 und 1918*, Bochum, Brockmeyer, 1992, Vol. 1, pp. 41f.

¹⁹ *Allgemeine Bestimmungen des Königlich Preußischen Ministers der geistlichen, Unterrichts- und Medicinal-Angelegenheiten vom 15. Oktober 1872 betreffend das Volksschul-Präparanden- und Seminar-Wesen*, Berlin, Hertz, 1873, pp. 11f.

²⁰ G. Schneider, *Der Geschichtsunterricht in der Ära Wilhelms II. (vornehmlich in Preußen)*, in Bergmann, Schneider (edd.), *Gesellschaft, Staat, Geschichtsunterricht. Beiträge zu einer Geschichte der Geschichtsdidaktik und des Geschichtsunterrichts von 1500-1980*, cit., footnote 6, pp. 132-189, pp. 134ff.

were formulated in 1912: to show the inner link of events, to honour historic personalities and to raise awareness for public life in the present. History was also supposed «to educate ... moral doing, namely in service for the ruling dynasty and fatherland»²¹. Since 1885, the focus on national thinking and similarities to Prussian curricula can be observed in the small state of Brunswick. This can be explained by the following: Brunswick was a small country and almost entirely surrounded by Prussian territory. Since 1885, a Prussian Prince had been Duke of Brunswick as the then reigning line had become extinct²².

2.3. *The Grammar School sector*

Grammar Schools in Prussia were better prepared against reactionary tendencies like Stiehl's regulations. In March 1882, however, the curricula for higher schools (Grammar Schools, Secondary Grammar Schools (*Realgymnasien*) and Advanced Secondary Schools (*Oberrealschulen*)) were changed. The goals of History Education were the following: to foster appreciation of the moral significance of the individual or of certain people. Pupils were to be made clear «how much they still lacked full understanding». They should furthermore be empowered to read the most important classical works of history for understanding²³. With these measures, pupils were taught uncritical appreciation of outstanding personalities or events and learnt passive acceptance. This was different in curricula for Grammar Schools and Secondary Schools in 1859²⁴.

The already mentioned *Highest Order* by William II and the *Suggestions for Execution of the Highest Order* referred to higher education as well. The time from the Great Elector until the coming to power of William II was supposed to be taught more extensively. The development of social and economic affairs was to be taught, in particular from the beginning of the century until the current socio-political legislation (provisions for the old and invalids from 1889). This was to be extended in the final grade and the pernicious state of Social Democracy should also be demonstrated. For that, other subject matter had to be cut, the history schoolbooks were to be complemented accordingly²⁵.

William II called Prussian school conferences between 1890 and 1900, new curricula followed in 1892 and 1901. In these, the goals of the King were phrased clearly, yet the Ministry of Education and Culture did not execute them

²¹ *Ministerialblatt für Kirchen und Schulangelegenheiten im Königreich Bayern*, 1912, pp. 397ff., 416f.

²² Erdmann, *Tendenzen*, cit., p. 62 (footnote 17).

²³ *Centralblatt für die gesamte Unterrichtsverwaltung in Preußen*, 1882, pp. 254f.

²⁴ L. Wiese (ed.), *Verordnungen und Gesetze für die höheren Schulen in Preußen, 2. bis zum Jahre 1875 fortgeführte Auflage*, Berlin, Wiegand und Grieben, 1875, pp. 87f.

²⁵ Schneider, *Der Geschichtsunterricht*, cit., footnote 20, pp. 136f.

the way the King had expected. This was mainly the case with regards to fleet and colonial politics. Yet there was enough room for those teachers who agreed with these politics, to propagate these ideas in History lessons²⁶. Furthermore, education in ancient history was put back even further. William II phrased it in the opening address of the first school conference in 1890: «Whoever has attended Grammar School and has looked behind the scenes, knows what lacks. It mainly lacks *at the national basis*. As a basis for Grammar Schools, we have to take the German spirit. We want to educate young German nationals and not young Greeks or Romans»²⁷.

Similar tendencies like the ones stated in the *Highest Order* in Prussia and that were taken over in the small state of Brunswick, were not the case in other individual states, despite the fact that not all goals of History Education were as clearly phrased as they were in Bavaria. There, one had attempted since the 1850s to promote education in Bavarian history. All new curricula for all higher schools in 1914 stated that Bavarian History should also be taught and to use regional monuments in History lessons. Goals were: «History education should finally teach moral doing, namely in the service of the closer and wider fatherland. Teachers of History therefore have to – without lapsing into moralizing – vividly present the ethical moments of History and to raise awareness for these; events and people of the time and their interlinks should be made clear, people should not only be judged by their success but according to their motives. Pupils will therefore be educated in areas of justice and impartiality»²⁸. This phrase makes it clear that History Education was not instrumentalised like in Prussia in favour of the monarchy. Shorter, yet comparable phrases, can be found in Saxony for Grammar Schools and Secondary Grammar Schools²⁹.

The Highest Order from 1889 aimed at functionalizing History Education in Prussia with regards to current social realities and political needs. This led to discussions about introducing an own subject of Political Education. In line with this development, at of the beginning of 1889, detailed concepts of Political Education existed, which however, according to Joachim Detjen, did not agree with the then practice of the Empire and therefore could not be realized when it was first published³⁰. The Prussian Ministry of Education and Culture decided in 1911 to introduce courses for civil rights in higher classes of higher education, which were to be supplemented by visiting city council

²⁶ *Ibid.*, footnote 20, pp. 137ff.

²⁷ *Verhandlungen über Fragen des höheren Unterrichts*. Berlin 4.-17. Dezember 1890. *Im Auftrage des Ministers der geistlichen, Unterrichts- und Medizinal-Angelegenheiten*, Berlin 1891, reprint Glashütten im Taunus, Auvermann, 1972, p. 72.

²⁸ *Schulordnung für die höheren Lehranstalten*, «Ministerial-Blatt Bayern», n. 50, 1914, p. 317.

²⁹ Erdmann, *Tendenzen*, cit., footnote 17, pp. 87ff.

³⁰ J. Detjen, *Politische Bildung. Geschichte und Gegenwart in Deutschland*, München, Oldenbourg, 2013², pp. 57ff.

meetings. In Saxony, higher secondary training colleges as well as higher girls' schools introduced the subject «citizen classes». Trade and commerce schools in Württemberg introduced compulsory law and economy classes. Other states and school types were expected to teach civil rights topics in History lessons³¹.

This short summary has shown that History Education was functionalized through curricula and regulations in the late 19th and early 20th century, however in different shape or form depending on school type and state. It has to be stated, though, that no possibility existed to prove whether these regulations and curricula were in fact executed or not. Teacher training surely played a big role in this process. The better this training was, the more likely it was that teachers did not execute all that was stipulated. History schoolbooks also played an important role. It is not without reason that they are still often called «the secret curriculum». Grammar School teachers were more likely to shy away from a functionalization of History Education, yet of course only when their political views did not match the regulations.

2.4. School wall charts

As previously mentioned, school wall charts were standard in public schools in the last third of the 19th century and in the first third of the 20th century. As so far there has not been a total list of all school wall charts in Germany, looking at the available teaching aid catalogues from the time of the Empire helps find out which wall charts existed for History Education. It can then be shown according to the available information, how the functionalization of History Education in curricula and decrees can be shown in wall charts. It goes without saying that not all available wall charts will be listed, mainly these relevant for our topic will be discussed.

A total of four teaching aid catalogues from 1892, 1911 and two from 1914 were available³². In the 1892 catalogue there were three series of wall charts for History lessons, one of which from Lohmeyer Publishers contained twelve wall charts, the other from Meinhold Publishers contained 60 black and white wall charts on German History without a single listing. There were also 36 coloured wall charts from Schreiber publishers for Education in World History, also with no specifications. The measurement is only 36/43 centimetres. It is interesting

³¹ A. Messer, *Das Problem der staatsbürgerlichen Erziehung historisch und systematisch behandelt*, Leipzig, Otto Nemnich, 1912, pp. 94ff.

³² R. Carl (ed.), *Müller's Erster deutscher Lehrmittel-Katalog nach den neuesten und direktesten Quellen zusammengestellt*, Dresden, Müller-Fröbelhaus, 1892. *Schulwart-Katalog. Ein illustriertes Verzeichnis des besten Lehr- und Lernmittel*, Leipzig, Volckmar, Ausgabe März 1911. F. Volckmar, L. Staackmann (edd.), *Lehrmittel Nettokatalog*, Leipzig, Berlin, Stuttgart, Albert Koch & Co., 1914. F. Koehler, *Lagerverzeichnis. Lehrmittel*, Leipzig-Stuttgart, Neff und Koehler, 1914.

that a series of regents' paintings is offered besides a wall chart by Anton von Werner on the proclamation of the Emperor and three paintings on the German-French War. One of these paintings shows live-size portraits of the *Hohenzoller* Dynasty, regents from the Brandenburg-Prussian Dynasty from the House of Hohenzollern, the House of *Hohenzoller* in pictures including personal slogans until William I (woodcut), then the German Emperors, a plaque of patriotic commemorative days and one plaque of the House of *Hohenzollern*. The Dynasty of Saxony is also featured as well as the heraldic line of Ernest in the House of Saxony, as well as 22 plaques of the Saxon regents. What is also offered is plaques of code of arms. Amongst cultural history images, there are 12 wall charts by Lehmann publishers that are worth mentioning. They range from German granges before the migration until the time of Rococco, 18th Century (*sic*). There are also plaques of buildings, sculptures and personalities, containing both poets, musicians and political leaders until William I.

In the context of Art History, there are many buildings of all epochs, whereas the respective text is available in German, French or Hungarian. Presumably, these wall charts were more suitable for higher schools and not for public schools.

If you compare the catalogues from 1911 and 1914, it becomes clear that more paintings were being offered. Lohmeyer Publishers now offered a total of 24 instead of 12 wall charts, divided into six series for lessons in History. While most series contained images of ancient and mainly medieval and early modern History (the last date mentioned is 1632, Gustav Adolf before the Battle of Lützen, the 4th series contains four wall charts on current patriotic history (The Great Elector at Fehrbellin on 16 June 1675, Frederic the Great at Zorndorf on 25 August 1758; Blücher at the front of the reserve cavalry at the Battle at the river Katzbach on 26 August 1813; King William I at the Battle of Gravelotte, the Garde's storming of St. Privat on 18 August 1870.) This company also shows four series of demonstration paintings (*Anschauungsbilder*) on German deity and mythology with texts by Felix and Therese Dahn, who were supported by and recommended to the Prussian Ministry of Education. From 1911 onwards, paintings from «Germany's military and fleet» were offered³³. In 1911, a company called Engleder, which was not yet mentioned in 1892, offered twelve «Patriotic History Paintings», which amongst others included references to Bavaria. Lehmann Publishers extended their range of cultural history paintings to 25 as early as 1911. Even Russian paintings with references to cultural history were offered, as well as a wall chart «of the German Empire and Saxon state legislation». In the catalogue by Volckmar from 1914, one can find eight wall charts, entitled «German Battles, German Victories». There were also «Paintings from Bavarian History. A cycle of extraordinary buildings

³³ This and other offers cannot be found at Koehler 1914, cit., footnote 32, who, however, offers many models for use in school.

in Bavaria» and twelve wall charts on the History of Wurttemberg. Next to German Empire and Saxon state legislation, wall papers on Prussian, Bavarian and Wurttemberg state legislation were being offered. The monument of the Battle of the Nations in Leipzig was unveiled in 1913, respective wall charts were available as early as 1914. It is noteworthy that three «paintings on social studies» were offered: «a jury court meeting, a *Reichstag* meeting and an oath of allegiance», as well as a plaque on German Civil law. It becomes clear that many portraits of Prussian leaders were offered, in parts with their respective personal slogans. Lehman Publishers also offered two series «From the Lives of Great Men» from «Charlemagne at the Christening of Wittekind» until «Johann Sebastian Bach plays in the presence of Frederic the Great». What was also offered were mythology paintings from the 'German' History with regards to the claim by William II in his *Highest Order*. The focus on military and fleet is also represented in available wall charts (1911 and 1914). It is also worth mentioning that in the course of time, wall charts from the constitution of the *Reich* and those of individual states like Bavaria, Prussia, Saxony and Wurttemberg were produced. Wall charts which explicitly show the history of individual states also show that at least larger and medium-sized states were aware of their own history. This was also represented in the respective goals of History Education.

2.5. *Conclusions*

It needs to be stated that wall charts represented not only the intentions of the curricula but also of William II's *Highest Order* and the functionalization of History Education. The discussion on political education and the partial introduction of the subject of Social Studies (*Staatsbürgerkunde*) was represented in wall charts. This becomes particularly evident in a teaching aid catalogue from 1914.

3. *The Time of the Weimar Republic*

3.1. *Curricula and regulations*

Shortly after the end of World War I and the proclamation of the Weimar Republic, a decree on History Education (against sedition, for cultural history) was published as early as 15 November 1918. On 27 November, appeals to teachers and pupils, decrees on the suspension of the clerical local school authority as well as the suspension of religious enforcement (*Religionszwang*)

(29 November 1918) were published³⁴. As early as 15 December the Gathering of «directors and higher schools for the male youth in Berlin and Brandenburg» protested against all decrees. The relatively moderate tone in these appeals to teachers and pupils was not referred to³⁵.

The publishers of the journal of German History Teachers «Past and Present» (original title: *Vergangenheit und Gegenwart*) then expected that History Education in particular should become part of future discussions and fights³⁶. That, however, did not happen. Jochen Huhn believes that is was due to the fight for 'Church and School', the Versailles Treaty also supported harmonising tendencies. At the same time, Grammar School History Teachers were socialised in the same way, public school teachers, who did not have an academic training in History, closely followed Grammar School History Teachers in content questions. Finally, parts of the Left also agreed to the current discussion structures for the already mentioned reasons³⁷.

On 6 December 1919, the Prussian Minister of Education and Culture forbade the use of old History schoolbooks because they were supporting warmongering and the glorification of the war. New books, which could have replaced the old ones – however – were not available. The Society of German History Teachers (*Verband deutscher Geschichtslehrer*) protested against that decision, the Saxon Minister of Education and Culture did not approve a similar procedure in Saxony. The ban was eventually watered down³⁸.

Not until the decree from 10 January 1923 did the Prussian Government comment on the state of History Education. At the beginning, the understanding of the present as goal of History Education was mentioned, and the link to the present as main reason of choice, yet without further commenting on it. The main part consisted of guidelines for History Schoolbooks. The only specific comment was on the claim to reduce «war and sovereign history». Only «what

³⁴ Erlaß über den Geschichtsunterricht vom 15.9.1918, in *Zentralblatt für die gesamte Unterrichtsverwaltung in Preußen* 1918, pp. 708f.; *Aufrufe an die Lehrer und Schülerschaft*, *ibid.*, pp. 710-716; *Erlaß über die Aufhebung der geistlichen Ortsaufsicht*, *ibid.*, p. 757; *Erlaß über die Aufhebung des Religionszwangs in der Schule vom 29.11.1918*, *ibid.*, p. 719. In the following year, the decrees on religion had to be taken back. Refer to E.R. Huber, *Deutsche Verfassungsgeschichte seit 1789*. Vol. V: *Weltkrieg, Revolution und Reichserneuerung 1914-1919*, Stuttgart, Kohlhammer, 1978, pp. 884-891.

³⁵ The protest is printed in «*Vergangenheit und Gegenwart*», vol. IX, n. 1, 1919, p. 48.

³⁶ F. Friedrich, P. Rühlmann, *Revolution und Geschichtsunterricht*, «*Vergangenheit und Gegenwart*», vol. IX, n. 1, 1918, pp. 1-12, p. 12. In 1911, the journal was founded by the mentioned authors. In 1913, the Association of German History Teachers was founded, the journal then became the Association's journal, cf. M. Rikenberg, *Die Zeitschrift Vergangenheit und Gegenwart (1911-1944). Konservative Geschichtsdidaktik zwischen liberaler Reform und völkischem Aufbruch*, Hannover, Universität, 1986 (Theorie und Praxis Bd. 7), p. 1.

³⁷ J. Huhn, *Geschichtsdidaktik in der Weimarer Republik*, in Bergmann, Schneider, *Gesellschaft, Staat, Geschichtsunterricht. Beiträge zu einer Geschichte der Geschichtsdidaktik und des Geschichtsunterrichts von 1500-1980*, cit., footnote 6, pp. 218-260, p. 224.

³⁸ *Ibid.*, p. 222.

has become historically relevant should become part»³⁹. This was, according to Jochen Huhn, a clever move of the Prussian Ministry of Education and Culture to refer to the decree of 1915 at the beginning, which asked for «changes of subject matter in the curricula in favour of modern History», yet does not restrict itself to specific content and contained no nationalistic undertones. By that, possible criticism was calmed, like the one from 1919⁴⁰.

3.2. Grammar Schools

Hans Richet, Ministerial Advisor in the Prussian Ministry of Education and Culture, had worked on a publication in 1923/24 for a new setup of the higher school system, which in 1925 was realised in the guidelines for curricula at higher schools in Prussia. Richet did mainly focus on the Germanic move, where the so-called culture-relevant subjects like Religion, German, Geography and Social Studies and History should be focused on. This had consequences for History Education. The general guidelines said that lessons should generally be working lessons. The main aim was to bridge the gap between the excitement of obtaining proven knowledge and the ability to work self-independently⁴¹. History and Social Studies were taught together. It needs to be mentioned that amongst the goals of this subject young men should not only be rooted in in their homeland, German folklore and state, but that they should also be able to comment on political tasks. Furthermore, they should understand foreign world views and thus should be trained to forbearance. Sovereign history and succession conflicts were to be cut, as well as war history. However, the drive of youths to worship heroes «by the representation of heroic people and lives» should be acknowledged⁴². The curriculum was structured in a way that teachers had to choose how much they were dealing with the mentioned content. In 7th grade, when History and Social Studies Education started, «tasks to understand the subject matter» were offered. After that, these topics were not covered until years 10 to 13⁴³.

³⁹ «Zentralblatt für die gesamte Unterrichtsverwaltung in Preußen», n. 65, 1923, pp. 64f.

⁴⁰ Huhn, *Geschichtsdidaktik in der Weimarer Republik*, cit., footnote 37, p. 223.

⁴¹ H. Richet, *Richtlinien für die Lehrpläne der höheren Schulen Preußens. Neue Ausgabe*, Vol. 1, Berlin, Weidmannsche Buchhandlung, 1927, pp. 99ff.

⁴² *Ibid.* pp. 164-178, in particular, pp. 165, 167.

⁴³ *Ibid.* pp. 372-384.

3.3. *Public schools*

The guidelines for devising curricula for higher classes of public school were already decided on in autumn of 1922, yet only published in May 1923⁴⁴. Pupils were to be taught «main topics of the development of the German nation and German state life». At the same time, the foundations of understanding the present and the current state should be laid. Furthermore, they should be taught that they were responsible as well for «the public and state as a whole». The history of the German peoples should be taught, the history of other nations only if German history is influenced by it decisively. Wars should be mainly taught regarding their causes and consequences. Right from the beginning of History Education, Social Studies should be taught acknowledging the children's age⁴⁵.

In the Weimar Constitution, the competencies between Empire and states on the area of education were divided. The regulations were, however, not clearly defined. That is why the Ministers of Education and Culture right from the beginning saw difficulties⁴⁶. The Prussian school reform had an exemplary effect on medium-sized and small states, maybe also because of the collaboration between *Reich* and states in the school sector committee (1924-1933)⁴⁷.

There were also decrees from the Prussian Minister of Education and Culture, which ordered «to remove monuments of past sovereigns» in the classroom. It was furthermore made clear that the views of Frederic the Great and Hindenburg were not included, but the representations of the previous Emperor and the Crown Prince were included. A similar decree forbade showing images of the last Emperor and his family in future schoolbooks⁴⁸.

Even despite the fact that the decrees and curricula did not contain nationalistic claims and despite the fact that the education of tolerance was stressed in curricula for higher schools, this did not mean that the claims for History Education were executed this way. According to Jochen Huhn, public school teachers mainly followed Grammar school teachers on the topic of History Education. He also states that the publications of public teachers

⁴⁴ «Zentralblatt für die gesamte Unterrichtsverwaltung in Preußen», vol. 65, n. 9, 1923, pp. 171ff.

⁴⁵ *Ibid.*, *Geschichte und Staatsbürgerkunde*, p. 175.

⁴⁶ Führ, *Zur Schulpolitik der Weimarer Republik. Die Zusammenarbeit von Reich und Ländern im Reichsschulausschuß (1919-1923) und im Ausschuß für das Unterrichtswesen (1924-1933). Darstellung und Quellen*, cit., footnote 4, p. 39. Collaboration between the Reich and the states in the Reich's school committee failed in 1923.

⁴⁷ K. Engler, *Geschichtsunterricht und Reformpädagogik. Eine Untersuchung zur Praxis des Geschichtsunterrichts an höheren Schulen der Weimarer Republik*, Berlin, LIT Verlag, 2008 (Geschichtsdidaktik in Vergangenheit und Gegenwart, Bd. 7), p. 152 with footnote 85. Engler even talks about «enormous pressure to adapt». See above p. 1 with footnote 4.

⁴⁸ «Zentralblatt für die gesamte Unterrichtsverwaltung in Preußen», 1919, pp. 603-605 from 25 September 1919 with reference to the decree from 26 June 1919. With reference to schoolbooks, *ibid.* pp. 223f. from 18 September 1919.

mainly contained positive remarks on the Weimar Republic, which had consequences for History lessons. Some authors did also mention values like self-independency, freedom, the ability to criticise, political thinking to counter emotional liability, maturity. These were not part of the discussion of Grammar School teachers⁴⁹. With the existence of the society's journal, according to Jochen Huhn, preconditions for pluralist history didactical views were laid in theory. In practice, however, these did not come into action because of the 'epistemic abstinence' and the reduced academic understanding in the society and its journal at least until the end of the 1920s. Erich Weniger, who was rather Humanities oriented, and Siegfried Kawerau, who in parts belonged to the group of determined school reformers, remained outsiders. Not until 1929 did an intensive discussion start in the journal on the up until then suppressed central epistemic questions⁵⁰. Only few historians, according to Horst Gies, approved of the Weimar Republic, at least for pragmatic reasons. As History teachers mainly were guided by Historians, it does not come as a surprise that Carl Baustaedt, co-publisher of «Past and Present» since 1931, remarked in the journal in 1934: «Many history teachers had 'played a role that the state of Weimar did not enter the heart of youths'»⁵¹. Gies managed to prove this by quoting topics of essays for higher secondary school pupils which were phrased by history teachers. He also looked at school celebrations.

3.4. *Wall charts*

From the time of the Weimar Republic, only the teaching aid catalogue from 1928 was available⁵². As it was published after important decrees, guidelines and curricula with regards to History Education in the Weimar Republic, this catalogue should be significant enough to judge how the available wall charts were in line with the specifications.

Wall charts on the military and fleet were not included. What was no longer available were the mostly Prussian, in parts also Saxon portraits of regents, some with personal slogans as well as heraldry plaques. What was also dispensed were plaques showing the constitution of the *Reich* and always one from the respective state, and the three Social Studies images.

⁴⁹ Huhn, *Geschichtsdidaktik in der Weimarer Republik*, cit. footnote 37, pp. 241f.

⁵⁰ *Ibid.*, pp. 227ff.

⁵¹ Quoted from H. Gies, *Die verweigerte Identifikation mit der Demokratie: Geschichtslehrer und Geschichtsunterricht in der Weimarer Republik*, in R. Dithmar (ed.), *Schule und Unterricht in der Endphase der Weimarer Republik*, Neuwied, Krefeld, Berlin, Luchterhand, 1993, pp. 89-114, p. 90.

⁵² Koehler & Volckmar, *Lehrmittelwerkstätten Leipzig* (edd.), *Schulwart. Lehrmittelführer für das gesamte Schulwesen*, Stuttgart, Koch, Neff & Oetinger, 1928.

The 32 striking portraits by Karl Bauer had already been available since 1892. They show 28x36 cm pen drawings from Arminius until William II. Because of their format, these paintings could also be used for decoration at home. As in 1914, life-size portraits of well-known men and women were also available by Wachsmuth Publishers. Amongst these were also William II, Empress Augusta and Crown Prince Frederic William. These publishers had offered four wall charts for History Education in 1914, now these paintings were offered in the area of world history. New were also five titles: «The Vienna Congress; marching out 1914; German submarine in battle with hostile cruiser; air battle; dugout». The cultural history paintings by Lehmann Publishers had been extended by four compared to the 1914 edition (first train; from the times of the moors; the first steam engine; *Meistersinger*). Five wall charts were added to the series «From the Lives of Great Men» from the same publishers. It needs to be asked, though, how the titles «Tournament, Great Hall, Lansquenets, the old Vienna, From the times of the post carriage», fit this category. The paintings on Austrian History now appear in the name of «New wall charts for History Education». The paintings on Bavarian History, which in 1914 were listed as a standalone series, were now incorporated into images on History (actually, buildings). Lohmeyer's wall charts for History Education were offered without change, also the wall charts on German deity and mythology. Wall charts on the Nibelungen saga appeared under the topic of History.

Because of the decrees on History Education it does not come as a surprise that military, fleet and regents' paintings were taken out of offer. It is striking, however, that a publishing company offered paintings by one series title in two instances, which do not fit the respective titles. Whether the publishers thought that the general title was attractive enough for the paintings to be sold or not, cannot be clarified. As wall charts were as a rule aimed at schools and not at private homes because of their size, it becomes clear that the producers of wall charts did not always stick to the decrees.

Even if «History and Social Studies» were taught as one subject, there were no wall charts on Social Studies any longer. It is clear that those from the times of the Empire could not be offered any longer. Why there were no new paintings available, however, remains unclear and could only be speculated on. The time until 1928 could have been sufficient to produce new wall charts. Maybe this depended on economic reasons as the risk was too big for publishing companies or as there were restrictions against the Weimar Republic.

3.5. *Conclusions*

In the Weimar Republic, History Education was not aimed at celebrating the war but at the same time did not worship resigned monarchs. It could be proven, however, that many history teachers did not approve of the new state

organisation but for manifold reasons did miss the old status of Germany and the monarchy. It can only be speculated in today's perspective what was taught and said in History lessons back then. Looking at wall charts, it becomes clear that not all publishers did follow stately decrees. Furthermore, schools were well equipped with wall charts. We cannot tell which wall charts continued to be used, it can be assumed, though, that wall charts from regents and no longer usable paintings on Social Studies were no longer used. This could have been different with wall charts with titles like «submarine boat» or «flight battle».

4. *The time of National Socialism*

The changes in the school system after 30 January 1933 were no result of clearly phrased and stringent ideas on education. Immanent contradictions in National Social thinking has been proven by research for a long time. However, the statement should not be taken for granted that these ideas were not relevant as there was in reality conformity on education concepts⁵³. Since January 1930, Wilhelm Frick, later Minister of the Interior for the *Reich*, had been the first National Socialist Minister of Education and Culture in Thuringia. Since October 1930, the National Socialists had a Minister of Education and Culture in Brunswick, since 1932 in Oldenburg and since July 1932 in Mecklenburg-Schwerin. This changed as a consequence of the *Gleichschaltung* in 1933⁵⁴. While Hans Schemm, the President of the NSLB (National Socialist Teachers' Association; original title: *Nationalsozialistischer Lehrerbund*) was provisional Minister of Education and Culture in Bavaria (since 13 April 1933 Minister for Education and Culture), he ordered on 27 March 1933 that at the beginning of the school year 1933/34 History Education in all school types had to be stopped for four to six weeks in order to deal with the times from 1918 until 1933. He made very specific orders in this decree, which should also account for Social Studies Education and – according to the age of the pupils – also for Local Studies Education. The last lesson of this school year had to be organised «as an elevated school party including short speeches of one teacher and one pupil on the departure of the nation, singing of patriotic songs, flags, decoration»⁵⁵. Württemberg, Saxony and Hamburg followed with similar decrees.

⁵³ H. Gies, *Geschichtsunterricht unter der Diktatur Hitlers*, Köln, Weimar, Wien, Böhlau, 1992, pp. 7ff.

⁵⁴ Führ, *Zur Schulpolitik der Weimarer Republik. Die Zusammenarbeit von Reich und Ländern im Reichsschulausschuß (1919-1923) und im Ausschuß für das Unterrichtswesen (1924-1933). Darstellung und Quellen*, cit., footnote 4, p. 61.

⁵⁵ Printed at Gies, *Geschichtsunterricht unter der Diktatur Hitlers*, cit., footnote 53, pp. 144-148.

The speech by the Minister of the Interior, Frick, on the new setup of the whole school system on 9 May 1933 in front of the individual states' Ministers of Education and Culture, did not go as far as Schemm's decree. What followed Frick's speech were guidelines for history books and that History Education should in future follow the guidelines. What should be stressed mainly was Early History as it showed «the cultural superiority (*Kulturhöhe*) of our German ancestors», what also should be shown was the cultural achievements of the ancient states in the Mediterranean as «Art by Northern Arian People». The Middle Ages should be seen «as a time of the greatest German power increase», the last two decades before World War I until the Day of Potsdam should be seen at the «focus of looking at History»⁵⁶.

Many schoolbook publishers assumed that soon a basic revision of schoolbooks was taking place. Back then, prints used to be made for several years, and as the schoolbooks of the Weimar Republic following the new curricula had not yet made enough profit, the publishers feared that they would not sell their remaining schoolbooks. For that reason, they offered supplementary booklets, similar to the times of World War I and the Weimar Republic, on Race and Early History and on contemporary history. As a shortcoming of new and usable concepts, using most history schoolbooks from the Weimar Republic was still ok⁵⁷.

As early as May 1933 probably all Ministers for Education and Culture of all states were members of the Social Nationalist Party⁵⁸, one year later, the Ministry for Science, Education and public education with Minister Bernhard Rust was created. It had decision power for all teaching authorities in the individual states. Not until 1938/39 were curricula published for higher schools, 1939/40 for middle schools and 1940/41 for public schools and put to practice. Gies first explained this delay with a disrespect of schools as instrument of power, then with a weakness of the responsible minister and finally with an incompatibility of the Nazi ideology and the proven historical tradition. He also mentioned differences in opinion of National Socialist

⁵⁶ *Ibid.*, pp. 27ff.

⁵⁷ H. Genschel, *Geschichtsdidaktik und Geschichtsunterricht im nationalsozialistischen Deutschland*, in Bergmann, Schneider, *Gesellschaft, Staat, Geschichtsunterricht. Beiträge zu einer Geschichte der Geschichtsdidaktik und des Geschichtsunterrichts von 1500-1980*, cit., footnote 6, pp. 261-294, p. 268, 278. Regarding the supplementary sheets, even during World War I and the Weimar Republic, cf. Regula Stucki, *Wie verführt man eine ganze Generation?, Ergänzungshefte als Medium zur zeitnahen kostengünstigen Vermittlung von schulischen Lernstoffen von 1933-1945*, Saarbrücken, Südwestdeutscher Verlag für Hochschulschriften, 2009, pp. 93ff. Stucki refers to the fact that these sheets before National Socialism were a medium «to at short hand use, soon-to-be-used and cheap mediation of current subject matter». With some of these sheets, she can identify topics as «The Territories in the East» and «Racism/Anti-Semitism», *ibid.* pp. 113-115.

⁵⁸ Führ, *Zur Schulpolitik der Weimarer Republik. Die Zusammenarbeit von Reich und Ländern im Reichsschulausschuß (1919-1923) und im Ausschuß für das Unterrichtswesen (1924-1933). Darstellung und Quellen*, cit., footnote 4, p. 62 with footnote 201.

History teachers⁵⁹. Before new curricula were introduced, there was a divide between the claim of National Socialist teacher trainers like i.e. Dietrich Klagges and others in the NSLB and the still valid curricula of the Weimar Republic. Depending on attitude, didactical knowledge and backbone, teachers had a certain tolerance⁶⁰.

As a sole state, Bavaria as early as 1936 had published new curricula for History Education at Grammar Schools and public schools. In a public statement on History Education at higher schools, it said at the beginning: «History Education serves at first to give an education in politics». In the following, there is direct reference to Hitler, when it was said that studying History serves to teach for the future and to secure and maintain the own nation⁶¹.

As early as autumn 1933, race decrees were published, which mainly were relevant for Biology Education. Hamburg as a sole state included these in History Education⁶². In 1940, throughout the *Reich*, execution principles on Race Education were introduced for all subjects as Education Principles⁶³.

If History Education was to serve for political Education, it does not surprise that Social Studies (or a similar term) could neither be found as an own subject nor in connection with History in curricula. In the guidelines on the curricula, the phrase can be found that school had to form the National Socialist human being with other powers of public education⁶⁴. This also shows quite clearly that school and Education were rather disqualified by the National Socialists as they had their own system of educating youths like the Hitler Youth (*Hiterljugend*) and the Association of German Girls (*Bund deutscher Mädels*).

⁵⁹ Gies, *Geschichtsunterricht unter der Diktatur Hitlers*, cit., footnote 53, p. 30.

⁶⁰ Genschel, *Geschichtsdidaktik und Geschichtsunterricht im nationalsozialistischen Deutschland*, cit., footnote 57, on p. 278 talks of «relatively lots of freedom».

⁶¹ Re-printed in: K. Filser (ed.), *Theorie und Praxis des Geschichtsunterrichts*, Bad Heilbrunn Obb., Klinkhardt, 1974, pp. 222-224, p. 222. History Education serves political Education; this can also be found in the guidelines for the individual school subjects at public school, which were decreed by the Reich's Ministry of Education in 1939, however, with an extension: «Die politische Erziehung der Volksschule gründet sich in erster Linie auf dem Geschichtsunterricht, der die Kinder mit Ehrfurcht vor unserer großen Vergangenheit und mit dem Glauben an die geschichtliche Sendung und die Zukunft unseres Volkes erfüllen soll. Er richtet den Blick auf den schicksalhaften Kampf um die deutsche Volkwerdung, bahnt das Verständnis für die politischen Aufgaben unseres Volkes in der Gegenwart an und erzieht die Jugend zum freudigen, opferbereiten Einsatz für Volk und Vaterland» (in *Erziehung und Unterricht in der Volksschule*, Karlsruhe, Bad. Druckerei und Verlag J. Boltze, 1940, p. 15).

⁶² Genschel, *Geschichtsdidaktik und Geschichtsunterricht im nationalsozialistischen Deutschland*, cit., footnote 57, pp. 267f.

⁶³ Gies, *Geschichtsunterricht unter der Diktatur Hitlers*, cit., footnote 53, p. 42. Footnote 21 lists the decrees.

⁶⁴ *Erziehung und Unterricht in der Höheren Schule*, Berlin, Weidmannsche Verlagsbuchhandlung 1938, p. 9. *Erziehung und Unterricht in der Volksschule*, cit., footnote 61, p. 5.

4.1. *Wall charts*

For the time of National Socialism, two teaching aid catalogues from 1936 and 1939 were available⁶⁵. The copy from 1936, apart from the preface, had not at all changed compared to the one from 1928. The author of the preface, school councillor and Head of the city school museum in Berlin, complains about the fact that the then available teaching aids were not judged positively by some school officials. Experiencing reality on your own was regarded as more important, so was walking one's homeland and observing nature. By that, the requirements for working lessons could not be fulfilled⁶⁶. The copy from 1939 was a special edition for public schools. As a new subject area, «Race Education and Genetics» had been added, one year before the decree of «Race Education as an Education Principle». What is striking is the very rich amount of wall charts on German modern history, which cannot all be mentioned in this article. The Germanic Peoples and their art of forging were moved to the Bronze Age⁶⁷. In addition, there were wall charts covering pre-historical objects from middle Germany, with Germanic uniforms etc. In addition, wall charts from national or patriotic history as well as cultural history images were on offer at Lehmann Publishers. These were not mentioned separately, as in the table before. Now also on offer were, amongst others, «Paintings on the History of the Third Reich», «Wall charts of Motorways of the *Reich*», «Images on the Reconstruction of State and Economy» and «The Swastika as Symbol in History»⁶⁸. It becomes clear that the guidelines, curricula and decrees had an influence on wall charts as well. Due to the delay in creating and publishing new curricula, it does not surprise that the new wall charts were also offered pretty late.

4.2. *Conclusions*

In National Socialism, Education and thus History Education were functionalised in line with the prevailing ideology. The curricula of the time and the schoolbooks were only published late. This does not mean, however, that the National Socialist view of history was ineffective. The devaluation of the school and the enhancement of organisations, not only the youth organisations,

⁶⁵ Koehler & Volckmar, Lehrmittelwerkstätten (edd.), *Schulwart. Lehrmittelführer für das gesamte Schulwesen*, Leipzig, 1936. Schulwart. Koehler & Volckmar, Lehrmittelwerkstätten (edd.), *Lehrmittelführer für das gesamte Schulwesen. Sonderausgabe*, Leipzig, A. Müller-Fröbelhaus, 1939. Other years by the janitor were not available or proved via inter-library loan.

⁶⁶ E. Engel, *Zur Einführung*, in *Ibid. Schulwart* 1936, cit. p. Vf.

⁶⁷ *Schulwart* 1939, cit. (footnote 65), p. 47: «Theil = Wilmsen, Drei Anschauungstafeln zur deutschen Vorgeschichte: Tafel 3: In der Bronzezeit schufen germanische Schmiede Schwerter und Werkzeuge, wie sie kein Volk schöner hergestellt hat».

⁶⁸ *Ibid.*, pp. 47-55.

had a much bigger effect on the infiltration of National Socialist thinking than History Education did. The available wall charts were also adapted late to the prevailing ideology.

5. Outlook to the time after 1945

Ulrich Mayer explained «the absence of a fundamental and standard reorientation» in History Education of the so-called western zones and in the old Federal Republic of Germany if at all by the lack of a reform concept as consequence of general political decisions. He rather sees the reasons for the various failing reform ideas in the competing ideas on historical-political education. The majority of politicians in the cultural sector saw it as their duty to continue traditions that were interrupted by the time of National Socialism. The spirit of Christianity and the legacy of the Occident were seen as main drivers of the reconstruction⁶⁹.

Four teaching aid catalogues from 1959 until 1972 were available⁷⁰. In the catalogue from 1959, only 14 historical cultural wall charts were offered, from which four had already been available in 1892: Germanic Farm-Stead, Knight's Castle, Time of the Thirty-Years War and From the Rococo Period. In 1963, more wall charts were available because more publishing companies were offering more paintings. In 1972, there was another rise in numbers, whereas style tables and tables on historical basic knowledge were also on offer.

Since the 1980s at the latest – as already mentioned – wall charts were being replaced by other media.

The school system in the SBZ/GDR was centralised. History Education was the most important school subject, which mainly served for ideological education⁷¹. Studies on school wall charts in the GDR have not yet been carried out.

⁶⁹ U. Mayer, *Geschichtsdidaktik und Geschichtsunterricht in der Nachkriegszeit (1945-1953)*, in Bergmann, Schneider, *Gesellschaft, Staat, Geschichtsunterricht. Beiträge zu einer Geschichte der Geschichtsdidaktik und des Geschichtsunterrichts von 1500-1980*, cit., footnote 6, pp. 349-380.

⁷⁰ Deutscher Lehrmittelverband (ed.), *Deutscher Lehrmittelkatalog*, Bochum, Ferdinand Kamp, 1959. *Jubiläums-Katalog für Lehrmittel- und Raumausstattung zum 25-jährigen Bestehen der Firma Georg H. Knickmann, Hamburg*, Hamburg, Knickmann, 1960. Deutscher Lehrmittelverband e. V. (ed.), *Deutscher Lehrmittel-Berater*, Schlüchtern 1963. Deutscher Lehrmittel-Verband e. V. (ed.), *Deutscher Lehrmittelberater*, Braunschweig, Westermann, 1972.

⁷¹ H.-D. Schmid, *Die Entwicklung des Geschichtsunterrichts in der SBZ/DDR*, in Bergmann, Schneider, *Gesellschaft, Staat, Geschichtsunterricht. Beiträge zu einer Geschichte der Geschichtsdidaktik und des Geschichtsunterrichts von 1500-1980*, cit., footnote 6, pp. 313-348, p. 313. Cf. also J. Fischer, *Geschichte im Dienste der Politik. Die Darstellung des Zeitraums von 1933 bis 1945 in den Geschichtslehrplänen und -schulbüchern der zehnklassigen*

5.1. *Wall charts on the Battle of Teutoburg Forest*

In the following, four wall charts on the Battle of the Teutoburg Forest from different times are being presented. Schoolbook analyses have shown that from the German Empire until the Time of National Socialism, the Battle of the Teutoburg Forest was mentioned and explained in detail. In addition, the language often had emotional overtones and the depiction did not allow analyses from different perspectives – apart from one schoolbook from the Weimar Republic. The historical classification and interpretation were often not appropriate and the link to the present often had emotional overtones. In the time after 1945 until the 1980s, schoolbooks in the Federal Republic of Germany did not or only marginally cover the Battle of the Teutoburg Forest, emotions could only be found in the attached sources from antiquity⁷². In the latest history schoolbooks, the Germanic Peoples get special recognition as these days there have been attempts to instrumentalize Romans and Germanic Peoples for culture exchange reasons⁷³. The discovery of the battleground of Kalkriese, which has been disputed to be the place of Roman defeat, lead to the fact that the Battle has been mentioned more in schoolbooks. In parts, finds from Kalkriese are presented, yet the events are not portrayed in an emotional way.

allgemeinbildenden polytechnischen Oberschule in der DDR von 1959 bis 1989, Frankfurt am Main, Peter Lang, 2004.

⁷² E. Erdmann, *Geschichtsschulbücher und Emotionen*, in P. Knecht, E. Matthes, S. Schütze, B. Aamotsbakken (edd.), *Methodologie und Methoden der Schulbuch- und Lehrmittelforschung*, Bad Heilbrunn, Klinkhardt, 2014, pp. 203-214.

⁷³ M. Sénécheau, *Die Germanen sind wieder da: Archäologische, didaktische und gesellschaftspolitische Perspektiven auf ein altes Thema in neuen Lehrwerken*, «Archäologische Informationen», 35, 2012, pp. 219-234, p. 231.



Fig. 1. *The Battle of the Teutoburg Forest.*

Bottom, left: «Printed and published by C.C. Meinhold & Söhne, Dresden». Top, left: «Images on German History, second collection». Bottom, right: signed by Plüddemann, top, right «II 1». Measurements: 47 x 63.5 cm. (Kept at: Schulmuseum Dortmund – Marten, Sign.: S 1988). Dated: the painting must have been created before or at the latest in 1868. In the teaching aid catalogue from 1892, there can already be found two series with 30 paintings each from Meinhold Publishers. This means that the painting must have been a pattern for a wall chart.

Hermann Freihold Plüddemann (*1809, Kolberg – †1868, Dresden) belonged to the older painters' school in Düsseldorf. He painted portraits and history paintings as well as illustrations and graphics⁷⁴.

⁷⁴ E. Mai, *Plüddemann*, in Kunstmuseum Düsseldorf im Ehrenhof und Galerie Paffrath, Düsseldorf (edd.), *Lexikon der Düsseldorfer Malerschule 1819-1918*, München, Bruckmann, 1998, Vol. 3, pp. 96-98.



Fig. 2. *The Battle of Teutoburg Forest 9 AD.*

Bottom, left: «*Lohmeyer's wall charts for History Education*». Bottom, right: «*Lohmeyer's wall charts for History Education*». Measurements: 72 x 98 cm. (Kept at: private property). Dated: past 1890 (original painting from around 1890).

Hermann Josef Wilhelm Knackfuß (*1848 – †1915, Kassel) belonged to the younger painters' school in Düsseldorf. Since 1881, he had been professor at the Academy in Kassel, where he taught painting. He painted history paintings, also portraits and since the 1890s also scenes of nature, which impress with impressionist elements. He travelled much and was also part of William II's trip to Palestine⁷⁵.

⁷⁵ G. Krey, *Knackfuß*, in *ibid.* Vol. 2, pp. 249f.



Fig. 3. *Hermann the Cherusker. The Battle of Teutoburg Forest.*

Bottom, left: «Painting by Franz Roubal. Führer and People. Images on the Greater German History». Bottom, right: «Leipziger Schulbilderverlag F.E. Wachsmuth, Leipzig». Measurements: Height 72 x Width 98.5 cm. (Kept at: Chair of systematic science of education [*Lehrstuhl für systematische Bildungswissenschaft*], research post Historical images, Würzburg, Sign.: W420). Dated: 1938.

Franz Roubal (* 1889, Wien – † 1967, Irdning) studied at the Academy of Fine Arts in Vienna. He initially devoted himself to animal painting, then he created three-dimensional reconstructions and live images from ancient animals in association with palaeontologists. He also created landscapes, school wall charts and book illustrations. Next to the Battle of the Teutoburg Forest, he painted at least two more wall charts, one on Henry the Lion, another on Prince Eugen. There is no total list of his works⁷⁶.

⁷⁶ H. Zapfe, *Franz Roubal*, «Ann. Naturhist. Mus. Wien», n. 73, 1969, pp. 19-23, p. 22.



Fig. 4. *Battle of the Teutoburg Forest.*

Bottom, left: «Academy of the pedagogic sciences of the GDR»; below: «Register-no 157; order-no 71112-8; cat.-no SKUS 03 9012 56». Bottom, right: «People and Knowledge People's Own Publishers Berlin»; below: «after a painting by Martin Harnoss». Measurements: Height 80 x 120 cm. (Kept at: private property). Dated: 1958 or later⁷⁷.

Martin Harnoss, also Harnoss (*1907 – 1990). Few is known about the artist⁷⁸. He worked as cartoonist, draughtsman, painter and history painter in Berlin, fled the GDR in 1958 and then became member of the Association of Fine Art artists, Berlin. There is at least one more history wall chart, called «Slave market in Ancient Rome», which was produced after his pattern. The Deutsches Museum in Berlin houses seven sketches on the Battle of the Teutoburg Forest from 1958.

⁷⁷ The Deutsches Historisches Museum shows sketches by Martin Harnoss (often also Harnoss) with the date 1958. It can be assumed that the wall chart was produced soon after the sketches. <http://www.dhm.de/datenbank/dhm.php?seite=5&fld_0=G0001629> (accessed: December 7, 2014).

⁷⁸ H. Offner, K. Schroeder, *Eingegrenzt – Ausgegrenzt. Bildende Kunst und Parteiherrschaft in der DDR 1961-1989*, Akademie Verlag, Berlin 2000, p. 600 Harnoss instead of Harnoss. Thanks for information about the artist to the members of staff of the Verein Berliner Künstler, Berlin.

The wallcharts are a mirror of their time of creation. For technical reasons, colour prints were very expensive at Plüddemann's times. For that reason, the wall chart comes in black and white. Strangely enough, some Germans carry an animal's head on their head, the fur in part covers their back, which originally belongs to a Roman Standard Bearer (signifer). Armin's helmet bears close remembrance of a late medieval helmet with decoration. Armin's armour in the coloured painting after Knackfuß from around 1890 seems medieval, his helmet seems rather Roman. The Germans can be identified by their blond, dark-haired and white long hair and their beard, but also by their clothes and arms. Remarkable is the female German in the foreground. She carries spears in one hand, the other hand gives her supports from the soil of the forest. Her white clothes bear remembrance to a Greek peplos. Female Germans did not fight but they cheered their men from the distance⁷⁹. In Roubal's painting, Armin on horse has to be highlighted. He wears trousers, a short light dress and a red cape. It is striking that all Germans have blond hair, their faces seem gaunt and determined, as it corresponded with the ideal when the painting was created (in 1938). Apart from two Romans in the front, the other Roman soldiers in the painting can barely be separated as they march very close to each other in a narrow pass. In contrast, on the painting after Harnöß, the Romans walking in the path below are easier to differentiate. They are being attacked from above with stones and on the ground with spears and bow and arrow. When visible, the Germans bear longish blond and dark hair. No leader can be identified, which corresponds with the prevailing ideology in the GDR (1958).

⁷⁹ Tac., *Germ.* 7,2-8,1. The shown wall chart slightly differs from the original painting by the artist. The bark of the tall tree is torn open, in the original, there is a thin trunk instead of the wide crack. Cf. *An den Grenzen des Reiches: Grabungen im Xantener Legionslager am Vorabend des Ersten Weltkrieges*, Nünnerich-Asmus, Mainz am Rhein 2014, p. 175 Abb. 121 shows a differing wall chart. The bark of the thick trunk is not torn, instead, there is a thin trunk. Thanks for information to the members of staff of the Sammlung der Neuen Galerie, Museumslandschaft Hessen Kassel.

Towards a new Chile through the heart: aspects on the construction of a nationalist *emotionology* in school textbooks during Pinochet years (c.1974-c.1984)*

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ABSTRACT: Through the analysis of textbooks of history and social sciences and complementary literature used in Chilean educational system during the period 1974-1984, this article discusses a dimension not yet studied about the nationalist proposals promoted by the military dictatorship led by Augusto Pinochet in Chile: the construction of a nationalist emotional project or, in terms of Peter Stearns, an induced *emotionology*, among other means, by rearticulating interpretations of the history of Chile and the imposition of a nationalist matrix, an anti-Marxist and conservative Catholicism discourse regarding to society and culture. Beyond iconographic analyses (Jara), conceptual approaches (Olivares) or a focus on the censorship inflicted to textbooks (Ochoa), our article moves on a new perspective on the problem of nationalism and patriotic loyalty, an object that has become one of the first issues in the history of emotions, trying to provide a discussion focused not merely on the official's own discursive construction but rather analyzing how to access to «structures of feeling» (Sobe).

EET-TEE KEYWORDS: History of Emotions; Textbooks; Nationalist Education; History; Chile; XX Century.

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1. *Introduction: after the Coup*

After the dramatic coup d'Etat that overthrew the Chilean socialist regime led by Salvador Allende on September 11 1973, deep historical changes in almost every area of the national reality occurred. An authoritarian civic-military coalition, under the leadership of General Augusto Pinochet, seized total power and a long dictatorship started. During the first years of civic-military regime repression against any political opposition became a priority in Pinochet's political agenda. The darkest period of violation of human rights happened during the first decade of Pinochet years, even though atrocities and state terrorism persisted until the end of dictatorship in 1990¹. During those first years, however, other main political and cultural transformations happened. One of them was the increasing application of radical changes that Chilean education would experience under a drastic turn that weakened the historical notion of Teaching State, a guiding light of national education for barely a century, and eventually led the system to a market-oriented education.

But educational changes were not only focused on administrative and structural issues. Pinochet claimed, with his distinctive messianic temperament, that rebuilding Chile was his historical mission, so education turned out to be another battlefield: an arena in which, according to Manichaeic military doctrines, «National Soul» and Nationhood had to face challenges coming from disruptive and evil forces led by international Marxism. In Pinochet's words «Marxism is not just a wrong doctrine, as there have been many in history. No. Marxism is an intrinsically perverse ideology, which means that everything that comes from it, even though its healthy appearances is riddled with poison that corrodes its roots»². Therefore, in order to avoid any possible expansion of what General Gustavo Leigh (one of the leaders of the 1973 military uprising) called «Marxist cancer» educational nationalism became a critical resource.

Educational nationalism in Chile has deep historical roots; however it has been used with very different meanings according to diverse challenges. As Patrick Barr-Melej has shown in a remarkable work, during the first half of twentieth century a constellation of intellectuals, many of them sympathizers of Radical Party and with a critic evaluation of decadent political system led by oligarchy, envisioned education as a mean to nurture a «nationalist sensibility that permeated the middle class's milieu» and, afterwards, to «manipulate the construction of a collective identity»³. Those operations, according to

¹ Classic well informed overviews of Chilean dictatorship are in C. Huneeus, *El regimen de Pinochet*, Santiago, Editorial Sudamericana, 2000 and P. Constable, A. Valenzuela, *A Nation of enemies: Chile under Pinochet*, New York, Norton, 1993.

² *El General Pinochet habla al país: 11 de septiembre de 1976*, Santiago, Impresora Filadelfia, 1976, p. 35.

³ P. Barr-Melej, *Reforming Chile: Cultural Politics, Nationalism, and the Rise of the Middle Class*, Chapel Hill, University of North Carolina Press, 2001, pp. 11-12.

E.J. Hobsbawm, quoted by Barr-Melej, were components of an «ideological engineering», representative of the building process of nationalism and settlement of (using Benedict Anderson's concept) an imagined community.

During 1930's and 1940's, under the political hegemony of the Popular Front, a moderate leftist coalition led by Radical Party, educational nationalism was installed as an ideological device intended to reinforce collaboration among popular and middle classes, State and entrepreneurial organizations. Chilean educational system promoted heroic images of military leaders of independence wars. The most important was Bernardo O'Higgins, but educational reformers emphasized his democratic attributes and his obedience to civil power rather than his military skills⁴. This precedent is quite important for what is argued in this article, since it is possible to note a clear pedagogical orientation in civil nationalism during 1930's and 1940's pondering not only the cognitive aspects as facilitators to achieve nationalization and social integration. As a result of the increasing professionalization of pedagogy and local appropriation of educational discourses transnationally circulating in previous years, this nationalism took into account psychological (and, by extension, emotional) aspects of children and young people, in a continuity of pedagogical efforts made since the last decade of nineteenth century, a period in which adult interest on child psychology, emotions and interests meant a starting point of a major turn in relationships among teachers, students and other actors of school life in Chilean education⁵. Accordingly to that conceptual heritage, civic nationalist reformers tried to encourage active nationalism based on integration of students with the community and spreading a comprehensive discourse rational and sentimental as well, nestled under the guiding concept of Defence of the Race, an idea of an epoch that witnessed a transitory supremacy of eugenic discourses⁶. Iconography, school textbooks, massive patriotic parades, among others resources, were displayed in order to promote a project that «sought to democratize culture, spread nationalism in the public sphere, and, by extension, realize a hegemonic project between revolution and reaction»⁷. Far away from that civilian nationalism, new concepts of history, Nationhood, Chilean society and the role of militaries in politics emerged during 1970's, with a deep influence

⁴ P. Toro Blanco, *Como se quiere a la madre o a la bandera: Notas sobre nacionalismo, ciudadanía y civilidad en la educación chilena (1910-1945)*, in G. Cid, A. San Francisco (eds.), *Nacionalismos e identidad nacional en Chile. Siglo XX*, 2 vols., Santiago, Ediciones Bicentenario, 2010, vol. I, pp. 154-155.

⁵ This turn is panoramically studied in P. Toro Blanco, *Close to you: building tutorials relationships at the Liceo in Chile in the long 19th century*, «Jahrbuch für Historische Bildungsforschung», Band 18, 2012, pp. 70-90.

⁶ P. Olivares, *Concept de Nation et identité nationale au Chili: une approche a travers les politiques éducatives et l'enseignement de l'histoire (XIX et XX siècles)*, Doctoral Thesis, École Doctorale, Sciences de l'Homme et de la Société (Director: Jean-Louis Guereña), Université Francois Rabelais, Tours, 2004-2005, pp. 173-186.

⁷ Barr-Melej, *Reforming Chile*, cit., p. 227.



Fig. 1. Yesterday and today. A comparison between chaos and order, according to National Secretary for Youth. (Source: revista «Juventud», n. 1, June 1977, p. 44).

country «in Order and Peace», and the old and dark vanishing Chile. Educational authorities stated that «between March and September 1973, the school calendar was accomplished in less than 30% of what was due. In short, the climate that our country lived for some years was a chaos and in education that chaos was permanent»⁹. The polarity between chaos (Popular Unity) and order (civic-military regime) became a sort of mantra for new authorities.

In such a critical context, during 1970's and first years of 1980's, nationalism in educational system became a standard that every actor in school was supposed to fulfil by giving visible testimony of compromise with

of the Cold War ideological climate.

A predictable outcome of beligerent anti-Marxist point of view that civic-military regime expanded was a deep reorientation about the meaning of Chilean history. Leaving behind multiple interpretations supported by contemporary social sciences, expressed in school textbooks during 1960's reformist period, a new conception of historical process was built upon nationalist basis. Chilean history should be understood, from them onwards, as an irreducible antagonism between Good and Evil. A few years after the military uprising, an exiled critic remarked that in Chilean education «historical reality is no longer opaque and complex; is reduced to the clash of two opposing wills contesting the destruction or construction of national reality»⁸. That radical opposition, according to the new government, implied the existence of two Chiles: the new one, born from September 11, as a luminous

⁸ J. Rodrigo, *La educación como forma de violencia*, in *Chile bajo la Junta (Economía y Sociedad en la Dictadura Militar Chilena*, Madrid, Zero, 1976, p. 259.

⁹ Ministerio de Educación Pública, *Desarrollo de la Educación Chilena desde 1973*, Santiago, 1980, p. 2.

Chilean beloved Motherland. A myriad of resources were displayed to inspire students learning and even feeling the patriotic message that the authoritarian civic-military regime unfolded. Curriculum was, of course, one of the most relevant. Subjects with an ideological latent dangerous profile such as language, literature, philosophy and social sciences were turned into (at least) neutral learning environments or became fertile fields for sowing the seeds of military regime's propaganda. Textbooks followed the same path.

Regardless nationalist objectives about patriotic rites, conservative interpretations of Chilean history and public cult to antique authoritarian leaders like Diego Portales, the real impact of those quotidian educational activities remains partially unknown. To what extent it was possible to penetrate the minds and hearts of children and young students with nationalist message? This is a permanent puzzle, because historians (as every social scientist) have a closer contact to *intentio auctoris*, the sources and contents of educational messages, more than what they really know about their actual impact on students. This challenge is applicable to any kind of message, including school textbooks, and is one of the capital problems that historians of emotion have to face. For instance, during military dictatorship public ceremonies with students singing the national anthem became much more frequent. A kind of national standard would be accomplished with periodical hoisting of the national flag, according to what authorities requested. In January 1975 educational authorities notified schools directors about expected outcomes of Decree n. 29, a legal act that ordered them to perform with all their school communities 32 civic rituals of homage to the armed forces during the school year «for the enhancement of the patriotic values»¹⁰. Nonetheless, patriotic feelings not always flourished in the hearts of students: remembering his childhood during 1970's, a talented historian recalls «by then, barely ten years old, I already had a certain perception of the political environment and the meaning of civic rituals and made a decision. I decided to move my lips (as discipline required) and pretend to sing, without actually doing so. Nobody would know but me»¹¹.

Considering that changing historical context, in which education was supposed to be one of the pillars for the New Chile that dictator Pinochet envisioned, the aim of this article is to shed light on his civic-military regime's attempts to create a nationalist *emotionology* through school textbooks. Regarding first political definitions of civic-military government that outlined his regime as nationalist, it would have been expected the growth of a consistent plan to promote education of that kind. Did really dictatorship led by Pinochet

¹⁰ Ministerio de Educación y Cultura, *Circular n. 850 sobre Decreto Supremo n. 29*, January 27 1975. [It is surprising the denomination of the Ministry in this document, because its official name in that year was Ministry of Public Education. Since the beginning of 1980's the word Public was deleted, in a very symptomatic action taken by civic-military regime].

¹¹ J. Rojas Flores, *Moral y prácticas cívicas en los niños chilenos, 1880-1950*, Santiago, Ariadna Ediciones, 2004, p. 7.

changed school textbooks in a radical way? To what extent changes prevailed over continuity in that area? Is it possible to identify something like a nationalist *emotionology* during second half of 1970's and the beginning of 1980's?

In order to answer these questions I present a succinct theoretical consideration on history of emotions and its possible relationship with school textbooks, particularly regarding to key notion of *emotionology*. Afterward, there is an analysis of a set of textbooks and educational regulations linked to educational nationalism that Pinochet dictatorship allegedly tried to establish during the first years of his regime.

2. *School textbooks and history of emotions: some brief approaches*

Noah Sobe has shown, in a well-informed appraisal of the current state of the field, that historians of emotions are nowadays growingly exploring a myriad of issues in the realm of history of education. According to him, recent predominant topics have dealt with problems on habitus and regulation «seeing the school both as a site where these emotional habits were produced and as a site where they played out»¹². That emphasis matches with the diagnostic that German historian Ute Frevert uses to explain why history of emotions, as a whole historiographical movement, is getting more and more attention. In her words, its «surge is due to a veritable shift in systems of governance. As much as these systems start to target the self and enhance the quest for self-optimization and self-management, they have become aware of emotions as main motivators and switch mechanisms of people's actions and non-actions»¹³. Control, discipline and regulation of behaviour are in the core of contemporary studies on education, as can be seen in research conducted by numerous historians that pay tribute to Michel Foucault's interpretative frame. In a general view, important movements of recent research on school textbooks share these guidelines and thematic focus. Thus, there is a likely initial confluence between history of emotions and history of school textbooks. As they share interests, they experience together same theoretical and methodological obstacles as well. For instance, both historians of textbooks as historians of emotions must face the chasm between discourses and practices, models and reality. Quotidian emotional experience or daily appropriation of curriculum and effective learning of skills through texts usually keep less visible for historians, since sources are generally richer in clues about the point of view of producers of

¹² N. Sobe, *Researching emotion and affect in the history of education*, «History of Education: Journal of the History of Education Society», vol. 41, n. 5, 2012, p. 690.

¹³ U. Frevert, *The Modern History of Emotions: a Research Center in Berlin*, «Cuadernos de Historia Contemporánea», vol. 36, 2014, pp. 31-55, in partic. p. 32.

speech (State, educational system, adults) rather than what receptors receive actually (communities, students, children). Historians of emotions have taken notice of this situation, as Peter Stearns points out, regarding to differences between emotional standards and practices: «the actual experience may have changed less, or at least differently, than the new standards imply. Historians of emotion still try to deal with both aspects of their subject, but in distinguishing between culture and experience they greatly improve their precision»¹⁴. In a recent methodological overview, Susan Matt enriches that caution when she asks «how did ordinary men and women received the art, the advice, the novels? Did they see as reflective of their own emotions or widely divergent from them?»¹⁵. In a similar way, it is possible to transfer these questions to the field of school textbooks: how did children and young student received values and messages from textbooks? Did they feel those values, such as patriotism, fitting to expectations and willing of authorities?

The anecdote described paragraphs above, regarding the student who moved his lips during patriotic ceremonies but refused to sing the national anthem, summarizes quite well certain epistemological and methodological problems that history of emotions has to deal with. It stimulates questions such as whether it is possible to define emotions just by their external manifestations, and if ritual forms (for instance, the civic ceremony that was not able to captivate the rebellious student) could be considered as emotional performances, regardless their actual impact on receivers. Or, in addition, a doubt comes out about how to rescue the resistances and decode the silences of subjects, from a point of view of the emotions, in a context of hierarchical relationships such as those that exist in schools. Unread pages of school textbooks, unfilled quizzes or questionnaires and unknown appropriation of their matters by readers pose challenges that seem equivalent.

Another element that may be considered as common to the challenges of the history of emotions and school texts is the problem of authority and power in messages. As noted by John Issit, referring to the latter, «embedded in textbooks therefore is a foundational epistemological assumption that they have a status, a bona fide status with a potential for universal application»¹⁶. For that reason, the texts would have an authority that would allow them to modify behaviour of readers, both in cognitive as emotional realms. That supposed power, nevertheless, is difficult to detect otherwise than knowing much more about

¹⁴ P. Stearns, *History of emotions. Issues of change and impact*, in M. Lewis, J.M. Haviland-Jones, L. Feldman Barrett (eds.), *Handbook of Emotions*, New York, The Guildford Press, 2008, p. 22.

¹⁵ S. Matt, *Recovering the invisible. Methods for the historical study of the emotions*, in S. Matt, P. Stearns (eds.) *Doing emotions history*, Urbana, University of Illinois Press, 2014, pp. 41-53, in partic. 49.

¹⁶ J. Issit, *Reflections on the study of textbooks*, «History of Education», vol. 33, n. 6, 2004, pp. 683-696.

actual practices of reading and having clear testimonies generated by recipients of the texts. Hence, knowledge of communications and power circuits is not easy to achieve. So, if a sharp analytical distinction between sender and receiver in the fields of emotions or transmission of content or values through textbooks is assumed as reasonable, we must recognize that there is a dark side of emotions and reading actually lived in daily school life, an obscure realm that can not be illuminated with usual sources (like regulations, educational plans, curricula, school textbooks) that, nevertheless, allow a better understanding of the visible side: the normative aspects.

The difficulty regarding effective impact of regulatory codes has been recognized in the history of emotions as well. In 1985, Peter Stearns defined emotionology as collective emotional standards promoted by social agencies and institutions in order to foster or discard certain types of emotions, or to consider them indifferently¹⁷. Even though its normative emphasis, however, Stearns' proposal recognized that the regulatory framework is not necessarily the same that effectively existing emotion. In this sense, the main value of the notion of emotionology lies rather in representing hegemonic social expectations about behaviour. This is particularly important in cases such as institutionalized fields like, for instance, the educational system. Therefore, the next section of this article uses loosely the concept as a reference, with regard to the intentions of the civic-military regime to promote nationalism ad hoc through education and, in particular, school textbooks.

3. *Elements of change and continuity in school textbooks during the first decade of Pinochet era*

As a contextual frame, it is important to take into account the interaction that occurs in each specific case between new political guidelines (especially of regimes arrived suddenly through coups) and textbooks editorial cultures. This leads to moderating the forced and automatic association between dictatorships and radical change of textbooks. A comparative historical perspective, such as that offered by Matthias vom Hau in his research on the case of Mexico, Peru and Argentina, helps to perceive that there were not always instantaneous fundamental changes in this field. For example, it is possible to note that Argentinian military regimes after the overthrow of Juan Domingo Perón in 1955 deleted any references to his Government in textbooks¹⁸. Something

¹⁷ P. Stearns, C. Stearns, *Emotionology: Clarifying the History of Emotions and Emotional Standards*, «The American Historical Review», vol. 90, n. 4, 1985, pp. 813-836.

¹⁸ M. vom Hau, *Textbooks, Teachers, and the Construction of Nationhood in Mexico, Argentina, and Peru*, «Latin American Research Review», vol. 44, n. 3, 2009, pp. 127-154.

similar is seen in the Chilean case, because textbooks used during the dictatorship of Pinochet stopped the contemporary history of Chile, without solution of continuity, in 1952. Thus, the period of accelerated democratization, social reforms, empowerment of leftist parties and popular mobilization since then and until 1973 became a sort of ahistorical parenthesis that did not even deserve to be mentioned. The Government emerged from the coup of 1973 was introduced, then, as a natural historic solution to chaos, a restoration of an interrupted Chilean essence. In that interpretation, after closing the history of Chile in 1952, a textbook affirmed: «the most important purpose of the Government, as set out in the Declaration of principles of the Governing Board, is to join the Chileans under the tenets of nationalism and Christianity»¹⁹. But Argentinian and Chilean cases were not a necessary pattern. Other political interruptions with military intervention, like Peruvian case during the 1970's, did not drive to deep changes in textbooks or to neglect a recent past.

The coup and the subsequent initiatives for its historical legitimation impacted on the educational system with different depth and duration. On the one hand, a set of actions was taken to control the teaching of subjects potentially critical, as it was the case of philosophy, history and language. Major curricular cuts, prohibition of certain texts, ideological control of the teaching were actions, among others, which sought to purge the educational system, a task that took place simultaneously with attempts to institute a nationalist education proposal. This scheme, as far as this article concerns, involved the scope of school textbooks because challenged them to fulfil duties such as strengthening patriotism in students and inducing feelings in children in order to involve them actively, especially during the first years of schooling, in the nationalist project under construction.

To what extent is it possible to utter that a systematic and strategic plan to carry out a nationalist proposal in Chilean education existed and that, at last, it had influences specifically and significantly on school textbooks? It is a legitimate question, at least for two reasons. The first is contextual and the second is due to the nature of the industry of school textbooks in Chile. On the initial, it is important to point out that the internal political dynamic of the Pinochet regime was structured on the basis of two major programmatic trends: a nationalist tendency and another with a clear neoliberal ideology, being the latter which eventually led the strategic course of the dictatorial period as a whole. Nationalist sectors had important role during the first years after the Coup and tried to consolidate it, among other means, through education and propaganda. Much of the nationalist doctrine alluded to convictions of sentimental order and appealed to basic emotions as a source to characterize Chile and «its vital reason. In this regard it should be noted the libertarian

¹⁹ S. Villalobos, *Historia y Ciencias Sociales, 7º año Básico. Chile: su historia. La República desde 1861*, Santiago, Editorial Universitaria, 1978 [1st ed. 1976], p. 45.

spirit, the rejection of dogma and the secret, the moral strength of physical weakness, aggressive reaction to the attack and the solidarity feeling emerged from difficult geography»²⁰. Therefore, it was expected that this political sector should promote the strengthening of patriotic values and images establishing an intimate link between the history of the country and the militaries. As indicated below, this had clear impact in the field of school textbooks.

On the second question (the effect of the nature of the publishing industry of textbooks), radical changes that could be imagined as a result of such a dramatic turn of Chilean political process, with quite an exceptional concentration of power in the hands of the civic-military coalition, were attenuated by some structural aspects of textbooks system. Jorge Ochoa (a pioneer in the field of school texts in Chile) remarks that there were several elements, beyond the ideological, that could affect changes in textbooks used in schools. Thus, for example, it is necessary to take into account material factors: texts with stronger visual impact required higher costs of printing, which threatened their expansion through the entire school system. Or, on the other hand, it should be remarked that production of texts in 1970's dealt with logics not exclusively domestic. There were large international consortia, like Santillana (from Spain), that created manuals and texts with a certain degree of standardization. In this sense, it is possible to think that many local editors would preferred to avoid a too narrow ideological alignment with the nationalist ideas that flourished in the first years of the military regime, to avoid publishing textbooks unable to use existing documents, images and learning activities²¹.

4. *Nationalist educational regulations and curricular transformations*

Keeping in mind the two precedent factors, which influenced the viability of nationalist education to become strategically hegemonic through textbooks, among other means, it is worth now considering the specific framework in which attempts to build a nationalist education in the first years of the military regime were expressed. So it seems necessary to mention at least two facets that were very visible and impacted quotidian life of schools: initiatives to promote faithfulness to nationalism and patriotism, and, on the other hand, actions carried out to redirect the contents of the teaching of history.

In relation to the first issue, the 1970's were a fertile soil for official initiatives promoting nationalistic and patriotic attitudes by different means and

²⁰ H. Vergara Paredes, *Destino nacionalista de Chile. Experiencia popular. Gobierno militar. Futuro incógnito*, Santiago, Imprenta Homero, 1976, p. 31.

²¹ J. Ochoa, *Textos escolares: un saber recortado*, Santiago, Centro de Investigaciones y Desarrollo de la Educación, 1990, pp. 136-137.

appealing to various senses. In relation to the eyesight, for example, it became obligatory to put in every classroom portraits of the members of the Board of Government, representing a sort of paternal guardianship over children and young people. In addition, a range of generously illustrated brochures were printed by the Government and distributed in schools as part of the purposes of establishing an emotional closeness between students and members of the Board. Particularly remarkable is one, broadly distributed in schools during 1974, which contained the biographies of the leaders of each branch of the armed forces. An interesting gesture in the text, designed to develop proximity with the students, was the empathic description of personal characteristics that each one of the military leaders during their childhood years. In this tuning effort, Augusto Pinochet was presented as «leader student and restless, with great interest on math and history». Admiral Toribio Merino was described as a sensitive boy that liked «breeding wild birds, painting, reading and doing much sport» and General Gustavo Leigh was defined as «restless and idealistic, he was a boy scout of the secondary school in which he made his studies»²². But it was not the only sense that students should exercise to be closer to patriotism championed by the authorities. With Decree No. 23, on September 18, 1979, the military Government established that cueca would be, from then onwards, the national dance of Chile and the Ministry of education should organize a contest for primary and secondary students every year.

Together with the importance given to leaders of the armed forces, other actions to strengthen patriotism were taken. Thus, for example, less than a month after the military uprising (that authorities euphemistically called pronouncement), in October 16, 1973, the Direction of Secondary Education dispatched to schools a document with a singularly imperative tittle: Permanent Ministerial Order n. 1. Two of the arguments of the Order shed light about early official language on the issue of patriotism. The document declared «it is not enough to feel the love of country but we need to externalize it, inter alia, with a high respect for the authorities, institutions and national symbols». And with that same tone of emotional appeal affirmed later «that is incompatible with the true and well extended feeling of Chilean identity, any other feelings that postpone or equal the love of country with feelings toward other Nations or ideologies».

In 1974 the authorities of the Ministry of Education commanded directors of high schools throughout the country to implement extraordinary activities during two full weeks of the school year, coinciding with the celebration of May 21, in honour of the maritime battle of Iquique happened in 1879, and from 11 to 18 September, anniversaries of the military pronouncement and the independence of Chile respectively. It is interesting to note that the objectives

²² Ministerio de Educación Pública. Departamento de Educación Extraescolar, *Biografía de los miembros de la Junta de Gobierno*, Santiago, Editorial Nacional Gabriela Mistral, 1974, p. 5.

of the second week of activities included, among other purposes, «to vitalize in students one of the most remarkable feelings in man: the love of country [...] and to love the history and the cultural tradition that unites us»²³.

Emotional invocations to students continued during the following years. Secondary students were taken as relevant actors within the first massive ceremonies that the civic-military regime carried out. As rightly noted Isabel Jara, a Chilean historian who has studied these true civic liturgies with emphasis in symbols and images, the attendance of young students as bearers of the torch handed over to military to let them ignite the so called Kindle of Eternal Freedom, in a ceremony held in 1975, is a symbolic milestone and sought to generate an emotional sense of communion linking people to armed forces²⁴. Radio and TV also collaborated spreading this appeal to young people, insistently broadcasting a propagandistic anthem with a chorus that became a soundtrack of quotidian life under Pinochet years: «Chile eres tú. Chile, bandera y Juventud» (Chile it is you. Chile, flag and Youth)²⁵.

The second facet in the construction of a nationalistic education (curricular control and changes to topics in teaching of history) had a less explicit and proactive emotional profile. While it may be argued that there was a kind of implied emotional disposition that legitimized the transformations in the school curriculum, based on the already described chaos-order opposition, the language tended to be less emotionally explicit and direct appeal to children and young people was less important than in the recently analysed cases. Many programs of study were purged of problematic issues (for instance, Foundations of Sociology was eliminated as a unit of study) and a global orientation to highlight heroic leaders were made, with the aim of connecting Chilean historical processes with elements of the individual character of these heroes: courage, patriotism, calling for order, political realism. All these attributes were associated with, above all, military personages. The political result of such an approach was obvious: the members of the Governing Board (and especially Augusto Pinochet) should be seen as natural heirs and performers of such attributes. The legitimizing function of history was more than evident²⁶. That is expressed, for example, in the emphasis given to social order and tradition, highlighted in

²³ Ministerio de Educación Pública, *Documento normativo de orientación general para la segunda semana de actividades para-académicas. Año 1974 (11 al 17 de septiembre)*, Santiago, August 6 1974.

²⁴ I. Jara Hinojosa, *Graficar una "segunda independencia": el Régimen Militar chileno y las ilustraciones de la Editorial Nacional Gabriela Mistral (1973-1976)*, «Historia», vol. 1, n. 44, 2011, enero-junio 2011, pp. 131-163, <http://www.scielo.cl/scielo.php?script=sci_arttext&pid=S0717-71942011000100004> (accessed: December 22, 2014).

²⁵ A version of this propaganda is still available online. See <<https://www.youtube.com/watch?v=T0YTZtZCt4>> (accessed: December 22, 2014).

²⁶ On this matter, a good overview is the research of C. Garrido, *Las visiones nacionalista y racista en los textos escolares de 7° y 8° Básico en Chile*, Santiago, Editorial Magisterio Colegio de Profesores, 2007.

the historical narrative according to official programs of instruction in 1978. Thus, for example, the study of the independence and political organization of Chile was understood as: «the prevalence of the aristocracy. Its wealth and social power. Cohesion and class-consciousness. Conservative and Catholic spirit. Sobriety of manners». The briefness of the rest of this topic was a testimony of the interpretative emphasis: «the economic and social role of other classes»²⁷.

Control over subjects, priority given to some themes or the conservative treatment of historical problems in the texts were elements, as noted, of an emotional dimension quite less explicit than those special activities designed to promote educational nationalism through an active commitment. Thus, for instance, much of the narrative structure of the history textbooks validated, in an elliptic way, order and conformity to ruling military authorities, without employing direct invocations to the students. Analysing the colonial period, for example, an author summarized some aspects of the social life of the Chilean colonial period in the following words: «in the official and religious manifestations, men showed their pain or joy, as it was the case. In the upper classes there were frequent gatherings and domestic parties, of quiet and fine tone [...] the popular people overflowed joy in taverns and dance houses. There they danced wildly, ate typical dishes and drank liquor and wine. Drunkenness and crime prevailed in such places»²⁸.

Interpretations in school textbooks of 1970's and 1980's were not limited only to validate social order by using the past as a model of social peace and naturalized differences among classes. There was also a transformation with regard to the weight of protagonists of the national history, insofar as it was reinforced the role that was attributed to the military. It is important, however, to consider that Chilean school history always incorporated them among the

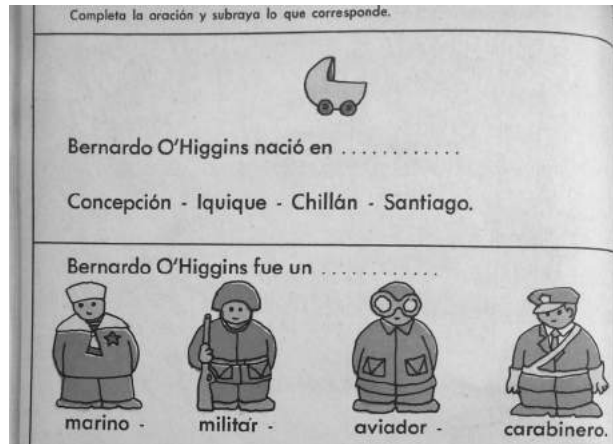


Fig. 2. Introduction of armed forces in school textbooks. (Source: R. Garrido, R. Labbé, P. Rodríguez, M. Luengo, *Material Didáctico de Historia de Chile. Primer Nivel*, Santiago, Ediciones Educativas, 1975, no page number).

²⁷ Ministerio de Educación Pública, *Orientaciones para la aplicación en el año lectivo 1978 de los programas de Historia y Ciencias Sociales en la Educación Media Científico-Humanista*, Santiago, 1978, p. 69.

²⁸ S. Villalobos, *Historia y Ciencias Sociales, 6° año Básico. Chile: su historia. Desde la Prehistoria hasta 1861*, Santiago, Editorial Universitaria, 1978 [1st ed. 1976], pp. 41-42.

most relevant historical agents. However, especially in texts intended for smaller children, there was a clear interest in showing military forces as depositories of most important values of the Nation and to put them into the imaginary of children through different media. A graphic example can be seen in Picture n° 2, which presents a multiple-choice exercise and a reading and writing activity with characters representing each branch of the Armed Forces.

The purpose of giving greater recognition to the armed forces led to naturalize them through school textbooks. Thus, despite the fact that, according to historical knowledge, it was difficult to sustain it, they were presented as if they had always existed in national history: «The Armed Forces, through history, can be characterized as part of the process; as they have contributed to enriching our nation, ensuring their freedom and territorial integrity. It is well known the role they played and their total devotion to the cause of Independence and later in the Pacific War and all the crucial moments of our life as an independent nation»²⁹. This naturalization of historical actors, matching with the idea of a qualitative deformation of contents, may be seen as one of many operations for the deployment of a hidden curriculum, according to what poses Francisco Cisterna, following the theoretical orientations of Michael Apple³⁰.

In summary, both the school and extracurricular initiatives and curricular changes were part of attempts to promote a nationalist interpretation of the history of Chile. While an uncritical interpretation could hold that such initiatives and changes were utilized with absolute advantage, given the dictatorial context, it is difficult to measure accurately the levels of achievement they had actually. As already noted, the gap between standards and practice makes difficult to deduce how many acceptance official nationalism had in the classroom. More complex is the situation when adding another element as mediator between transmitter and receivers: the teachers. There is a 'black box situation' that happens in every classroom, since teachers cannot be perceived just as simple transmission devices of official curriculum. Certainly, the focus of this article takes into account that limitation, even though they are out of the scope of our sources.

²⁹ R. Krebs, *Historia, Geografía y Ciencias Sociales 8° año básico*, Santiago, Editorial Universitaria, 1983, p. 118.

³⁰ F. Cisterna Cabrera, *La enseñanza de la historia y curriculum oculto en la educación chilena*, «Docencia», n. 23, 2004, pp. 48-59, in partic. p. 54 (<<http://www.revistadocencia.cl/pdf/20100731195129.pdf>>, accessed: December 22, 2014).

5. *Glimpses on emotions in school textbooks and teaching orientations.*

Emotional invocations in textbooks are not an anomaly. In fact, depending on the age of children and young students, a multiplicity of forms to express affects and feelings are used. This section presents selected evidence on some emotional appeals in school textbooks during 1970's and first years of 1980's. A introductory statement about the limits of this exercise is required: given that attention is granted to terms denoting emotions that appear linked to a modified historical narrative with deeper emphasis in national identity, it is complex to discern how much of the frequency of these allusions is actually a circumstantial product and how much is due to long-term temperaments or standardized versions of so-called Chilean character. This is a problem which lies at the core of difficulties that history of emotions faces, since one of the big dilemmas is whether emotions are basically a set of finite forms of the human condition that are present at all times under similar forms (a universalist perspective held, among others, by Paul Ekman) or if they are cultural constructions and, therefore, may have special features according to time and place. In this second thesis (a constructionist point of view) historical change is, undoubtedly, a more relevant factor. This dilemma can be applied to the topic studied here, as soon as it is possible selecting an approach that emphasizes structural attributes of long duration or choosing an analytical lens with attention to possible changes in less extensive cycles. In short, what is in dispute is whether the weight of a permanent emotional essence is heavier or, on the contrary, if it is possible to appreciate changes and changing emphasis, which would mean granting agency over emotions to policies: in other words, it means to hold that it is possible to study *emotionologies* in short time cycles. Keeping this in mind, some examples on emotions in an authoritarian context are analysed in next paragraphs, with reference to the Chilean identity as a problem with deep historical roots.

Pamela Olivares, researcher on the concepts of nation and national identity in educational policies and history textbooks in Chile, remarks that in school textbooks during 1980's unity in front of danger is frequently highlighted as an element of long-term historical being of Chileans³¹. Therefore, according to our analytical proposal, it can be seen that students are managed, through textbooks, to an emotional disposition that combines fear and confidence. Military episodes concerning to conflicts with Chile's neighbours appear in textbooks as a fertile ground to detect the induction to these two emotions in students. On the one hand, there is an emphasis on the uniqueness of Chile and its differences with a regional hostile regional scenario and, on the other hand, great importance is given to some sort of superiority, a feature based on a national identity that is, allegedly, a trans historical consequence of facing challenges and dangers with courage. An example, regarding the first decades

³¹ Olivares, *Concept de Nation*, cit., p. 212.

of national organization, is the allusion to Chilean triumph over Peru-Bolivian Confederation (1837-1839): «The victory of [Chilean army in a decisive battle in] Yungay instilled great optimism in Chilean; men of this land had proved their physical and spiritual strength, had beaten a clearly superior enemy fighting on their own ground»³². A spiritual appellation, balancing fear to the other and a sense of superiority, became abundant in school texts during 1970's and beginning of 1980's. It is evident that the coincidence of a state of siege, a time of restriction to individual and collective freedoms under the reason of national security and unity, made this appeal much more meaningful for students.

National Unity against current enemies that dictatorship detected (border countries or the ghost of international communism) should be strengthened by every available mean. Accordingly, schools were meant to be a place to carry on efforts to galvanize nationalist feelings because «every child, Young boy and adult must acquire, enhance and defend ideas, feelings and objects that contribute to become a more caring person to his fellow, self-realized and especially persevering with their status as human being and Chilean»³³. In this sense, the past was clearly interpreted according to current national challenges. In a text for seventh grade students (twelve years old) two concepts were highlighted graphically in capital letters: «the nation emerged strengthened from conflict. It defeated two countries that together were much more powerful; PATRIOTIC SENTIMENT was increased and it was left a feeling of very confidence in our NATIONAL DESTINY»³⁴. Emotional appeal recalling historical past was linked to a shared collective purpose, matching with one of the columns of authoritarian discourse: the idea of a predestined and eternal Chilean national soul.

In order to reinforce the idea of national unity, not only relying on a partial reading of the historical facts and stressing the role of armed forces, actions were made to strengthen mechanisms and symbols of authority. It is evident in the words of Pinochet warning to teachers that «integral restoration of the principle of authority, so broken in recent times, must rest on the moral ascendancy of superior [...] to understand the importance and nobility of the authority the youth must see their masters as worthy admiration and respect testimonies»³⁵. In addition, official orientations about history teaching encouraged these hierarchical values claiming that teachers should always induce their students to cultivate «special development to rules of coexistence, that turns into respect,

³² N. Duchens, B. Schmidt, *Historia y Geografía 7° básico*, Santiago, Editorial Santillana, 1983, p. 140.

³³ C. Díaz, L. Domínguez. *Historia y Geografía 8° básico*, Santiago, Editorial Arrayán, 1988, p. 10.

³⁴ R. Krebs, *Historia y Geografía 7° Básico*, Santiago, Editorial Universitaria, 1983, p. 100.

³⁵ A. Pinochet, *Mensaje del excelentísimo Señor Presidente de la Junta de Gobierno a los educadores de Chile*, «Revista de Educación», n. 47, 1974, pp. 2-3, in partic. p. 3.

tolerance, cooperation, respect for others opinion, responsibility and respect to the legitimately instituted authorities»³⁶.

Emotional appeals in teaching guidelines that educators received to teach patriotic values reveal that certain attributes, which could be interpreted as pedagogically progressives (e.g., an active didactic which emphasized not only intellectual realm), could have an application quite politically conservative. As this official orientation shows:

This Unit [about national hero Bernardo O'Higgins] has been developed in line with the Confluent Education, which cultivates simultaneously intellectual, emotional and corporal mastery [...] it has been designed minding the current education policy, which basically proposes the Unity as a basic parameter of national knowledge of the patriotic values and the common heritage of all Chileans as well. [...] This Unit also proposes that objective and reveals that practical concern must be expressed not only in intentions, but in direct and emotional way, so that each student knows and 'feels' the values that you delivery to him or her and you do your part *now and here*³⁷.

Recognition of emotive aspects in school textbooks and official teaching orientations supplements an ingredient to traditional analysis strictly focused on aspects of content. One way or another, it leads to a still unknown realm, because introduces the question of how to reach intimate spaces of conviction to achieve purposes such as which envisioned a teacher with her students in 1979. She wanted to make them «understand the influence of affection in the appreciation of our environment; understand the meaning of the temple of mind in assessing subjective world by the artist; identify the temple of mood in the national anthems; discover patriotic duties that each one feels like of his or her own developing a sense of commitment to the historical destination of Chile»³⁸.

6. *Final reflections*

One of the more fruitful lines of study within the field of the history of emotions focuses on the interface between emotional factors and pursuit of political goals, through forms of influence and mobilization of broad spectrum, which include the school system. If theories of nationalism identify, in general, the emotional facet as a main element for building ties of belonging to imagined communities, it is understood that those who seek to establish specific interpretations of

³⁶ *Sugerencias y modificación en relación con los contenidos de Ciencias Sociales de los programas de Primer Ciclo Básico*, «Revista de Educación», n. 49-50-51, 1974, pp. 23-25, in partic. p. 23.

³⁷ H. Vásquez, M.I. Frei, P. Varas, *O'Higgins y yo*, «Revista de Educación», n. 72, May-June 1979, pp. 6-13, in partic. p. 7.

³⁸ J. Guerra, *Sintiendo a Chile a través del Himno Nacional*, «Revista de Educación», n. 73, July-August 1979, pp. 5-9, in partic. p. 7.

nationalism (like, for example, Chilean armed forces with their inspiration in National Security Doctrine) should consider school textbooks as means to promote it in the mind and especially the heart of children and young people. Less conceptual and abstract appeals, and on the other hand, more sentimental and embodied in heroic characters allowed spreading suffering and distances, hope and fear, allegedly. Accordingly, this text has tried to explore, briefly, how the civic-military regime led by Augusto Pinochet proposed promoting its own version of nationalism and which was the emotional emphasis used to do this.

As it has been noticed in recent studies on the relationship between emotion and power, its complexity should be understood, since power involves both emotional and discursive realms. To enrich the study of political phenomena as nationalism, according to the proposal of Nicole Eustace (in her case, studying the emergence of American nationalism in the context of political modernity), it is necessary to consider the installation of a rational public sphere, which refers to the concepts of Habermas, and emotional appeals to the community, involving contributions of Benedict Anderson³⁹. Although the phenomenon that has been analysed in these pages differs in time and space, the core of the invocation of Eustace is quite pertinent: understanding a political process (in this case, the attempt to build a nationalist regime) should mean an analytical exercise on mechanisms of conviction (from *habermasian* rational debate) as emotional persuasion but without underestimate any of these two realms.

Keeping in mind the unavoidable interaction of ideology and practice and, on the other hand, the problematic relationship between change and continuity that is characteristic of school textbooks, it is possible to appreciate that text, images, music, school events, formed part of a specific effort to represent to the students a sense of national identity that appealed to them not only from intellectual domain but from affections. National Unity and Destiny; induced feelings like fear or confidence derived from collective historical experience; respect and inhibition in front of authorities: all these elements were displayed as components of a nationalist *emotionology* in which, at last, reactive dimensions (fear, obedience) prevailed. Other historical factors, like internal conflicts during civic-military regime that diminished the political strength of nationalist alliances for the benefit of neoliberal groups, help to understand that a likely nationalist *emotionology* did not have continuity in time and a greater stability.

Finally, regardless of a more reflexive approach, concerning affective dimensions of official messages through educational system, the dark side of the emotional puzzle still keeps hidden. Complementary methodologies and sources are needed to enrich our knowledge and reach, as possible, the actual impact that nationalist appeals had in the hearts of Chilean boys and girls during the first years of Pinochet dictatorship.

³⁹ N. Eustace, *Emotions and political change*, in Matt, Stearns (eds.), *Doing emotions history*, cit., pp. 163-183, in partic. p. 174.

The process of the Slovenian pedagogy gaining independence under the Austro-Hungarian Monarchy

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ABSTRACT: The beginning of the article describes the position of Slovenians in the multi-cultural Austro-Hungarian Monarchy and the Germanisation pressures small nations were subject to. It presents the language policy in schools on the territory populated by Slovenians – here special attention is given to the position of Slovenian as a school language in colleges of teacher education where German was predominant. It was only in 1912 that the male college of teacher education in Gorica (Gorizia/Görz in Italy) became a completely Slovenian institution. Parallel to the efforts for Slovenian as a language in schools the production of pedagogic literature in Slovenian language started to build up. In this context the article exposes the memorandum of the association of Slovenian teacher societies from 1895, which was addressed to the Austrian school authorities, in which Slovenian teachers strived for the reform of primary school readers: all texts with realistic learning material should be replaced with belles lettres.

EET/TEE KEYWORDS: Educational Policy, Language Policy, Discrimination, Teaching Language, Teacher Education, History of Education, Slovenia, XVIII-XX Centuries.

The history of the Republic of Slovenia is short – it is connected with the process of disintegration of former Yugoslavia and the formation of new countries on its territory. The citizens of Slovenia chose an independent and autonomous country in the plebiscite in December 1990. The declaration of independence, which was opposed by the Yugoslavian authority with military force, followed on 25th June 1991. The decision of Slovenians to live in an independent country started its realisation only after the Ten-Day Independence War which ended with the departure of the Yugoslav army. This was followed by efforts for gaining recognition of the new country and ended on 22nd May

1992 when Slovenia became a full member of the United Nations. In 2004 the Republic of Slovenia became a member of the European Union.

The history of the Slovenian nation is significantly longer¹. This history begins with the settlement of Slavs on the territory of today's Slovenia (6th century) and is linked to the development and preservation of national identity inside various state political regimes, which came and went during the coming centuries, and the conditions of coexistence with other nations which lived in this area. The entire time of its history the essential element of preserving Slovenian national identity was the Slovenian language which was always crucially tied to school education. The educational system developed similarly in this area as it did in the rest of Europe i.e. its close neighbourhood: from the 6th century on missionary work was present in this area, Christianisation of immigrants as well as the effects of clergy education which was encouraged by Charlemagne. Here as well as in other areas we can find cathedral, monastic and parish schools, town schools also started emerging from the 12th century onwards. At the end of the Middle Ages the Vienna and other universities hosted more than 2,000 students from the Slovenian ethnic territory². These schools also greatly co-formed the cultural image of the environment but they cannot be attributed greater significance in maintaining and developing Slovenian language.

A turning point in the cultural, religious and social development of the Slovenian nation is the arrival of Protestantism on the Slovenian territory. The main figure of the Protestant movement in Slovenia was Primož Trubar, who provided the print of the first book in Slovenian language (*Catehismus*, which was printed in 1550 – *Abecedarium* was released at the same time), he is also known as the 'father' of the primary school in Slovenia because of his work *Church Ordinance* (*Cerkovna ordninga*) from 1564 where he outlined the organisation of the Protestant Church as well as the organisation of the educational system. Here he demanded, among other things, that every parish would have to have its own teacher who would teach city and country children, boys and girls catechism as well as reading and writing in Slovenian³.

¹ A good overview of the history of Slovenians in English can be found in the book: O. Luthar (ed.), *The Land Between. A History of Slovenia*, Frankfurt am Main et al., Peter Lang, 2008. The history of Slovenians in English is also available on-line in the book: P. Štih, V. Simoniti, P. Vodopivec, *A Slovene History: Society – Politics – Culture*, Ljubljana, Inštitut za novejšo zgodovino, Sistory, 2008, <<http://sistory.si/publikacije/pdf/zgodovina/Slovenska-zgodovina-ENG.pdf>> (accessed: November 20, 2014)

The history of the school system in Slovenia, together with the current school regulations and future perspectives is available on-line: *Slovene Education System Yesterday, Today, Tomorrow*, Ljubljana, Ministry of Education and Sport, 2007, <http://planipolis.iiep.unesco.org/upload/Slovenia/Slovenia_Education_system.pdf> (accessed: November 20, 2014).

² V. Ciperele, A. Vovko, *Šolstvo na Slovenskem skozi stoletja* [Schooling in Slovenia Through the Centuries], Ljubljana, Slovenski šolski muzej, 1987, p. 71 (in Slovenian).

³ V. Schmidt, *Pedagoško delo protestantov na Slovenskem v XVI. Stoletju*, [Pedagogic work of Protestants in Slovenia in the 16th Century], Ljubljana, Državna založba Slovenije, 1952, p. 19 (in Slovenian).

This was a period when the religious, cultural, economic and administrative life of Slovenians was already embedded in the authorial structures of the Habsburg Monarchy, a part of which was also the Slovenian territory, and it remained this way until the dissolution of Austria-Hungary in 1918. All this time the Slovenian nation was divided under different administrative-territorial provinces inside the monarchy, without its own statehood and political autonomy. During this time Slovenian language and national consciousness underwent the development from first printed books and awareness about their own language to national-political awareness of broad classes and their demand for a politically autonomous 'United Slovenia', which was as a petition addressed to the emperor in the revolutionary year 1848. The essence of the petition was, among other issues, the demand for unifying the Slovenian territory along the language border into one country. This wish was never realised⁴ and the Slovenians remained divided into the Austrian, Hungarian and Italian part of the country but Slovenian language became one of the official languages of the monarchy from that point on. Before that Slovenian language was basically a language of pheasants and lower working classes, their educational and religious books and one single modest Slovenian newspaper which was being published once a week. German was predominant in offices moreover few Slovenian intellectuals could also more easily communicate in German than in Slovenian language⁵.

The second part of the 19th century is thus a time of intensive political, economic and cultural rise of the Slovenians within the Habsburg Monarchy. Slovenian language was also implemented in the constitutional life as a parliamentary language and Slovenian expert terminology reached a high enough level to enable the production of scientific literature in Slovenian language. The Slovenian expert, scientific and artistic publishing was supported by numerous political, cultural and economic associations, which emerged in the second part of the 19th century. This is a time when on the one hand, there was a more intensive effort for a different status of Slovenian language in schools on the Slovenian ethnic territory and the resistance toward Germanisation pressures but on the other hand, this was also the time of increasing pedagogic expert formation in Slovenian language.

This article tries to present the language policy in schools on the territory where Slovenians lived. We are going to follow a chronological map of key Austrian primary school laws up to the dissolution of the Austro-Hungarian Monarchy. We shall present the position of the Slovenian language as the teaching language and a school subject in the framework of each period limited

⁴ Even today a part of Slovenians live outside the country's borders. Today Slovenian minorities can be found in Italy, Austria, Hungary and Croatia.

⁵ V. Melik, *Slovenci 1848-1918*, [Slovenians] Založba Litera, Maribor 2002, p. 31 (in Slovenian).

by the enforcement of an individual law, the position of the Slovenian language in the scope of teacher education and the state of pedagogic thought in Slovenian language in this period. Finally, we are going to put special emphasis on the document from 1895 which was addressed to the Austrian school authority by Slovenian teachers. In this document they strived for a reform of primary school readers: all the texts with realistic learning material should be replaced with belles lettres.

The General School Regulation from 1774

In the 60s and 70s the proposals for the school reform in the Habsburg Monarchy were already so numerous that a comprehensive legal solution of this issue could no longer be postponed. Among those who sent their proposals about the organisation of the school system to Maria Theresa was also a Slovene Blaž Kumerdej. At this point we are not interested in the details of his proposal. It was a characteristic Enlightenment argumentation which pointed to the importance of acquainting common people with religious and economic doctrines and civic duties. In the context of our discussion the essential point is that Kumerdej strived for establishing of schools in the Carniola (Kranjska) region where lessons would take place in Slovenian, he also offered to translate the textbooks into Slovenian himself. This proposal is viewed in the Slovenian pedagogic historiography as «one of the most important documents of Slovenian national awakening in its first period»⁶, as well as «the most important document for the history of the Slovenian primary school»⁷. In contrast to clerical and secular dignitary in Slovenia, who opposed Kumerdej's proposal, his proposal was regarded highly by the empress Maria Theresa. Two years later, when the *General School Regulation*⁸, the 1st Austrian Primary School Law was enacted, the empress entrusted the leadership of the model⁹ primary school in Ljubljana to Kumerdej.

⁶ Ciperle, Vovko, *Šolstvo na Slovenskem skozi stoletja*, cit., p. 38.

⁷ V. Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem* [The History of Schooling and Pedagogy in Slovenia], 3 voll., Ljubljana, Delavska enotnost, 1988, vol. I, p. 168 (in Slovenian).

⁸ Allgemeine Schulordnung für die deutschen Normal-, Haupt- und Trivialschulen in sämtlichen Kaiserl. Königl. Erbländeren. The law from 1774 is summarised from the reprinted version in Engelbrecht, *Geschichte des österreichischen Bildungswesens*, cit., pp. 491-501.

⁹ The model school (Normalschule) was one of three types of schools envisioned by the law. The countryside *trivial* schools (Trivialschule) were intended for simple rural population and included religious education, reading, writing, calculus, secular morale and basic concepts of economy. Major schools (Hauptschule) in bigger cities taught along with the previously mentioned subjects also the German grammar and essay, elemental Latin, science, economy, history, geography, basic geometry, architecture, mechanics and drawing. Model schools were schools which were mainly established in capitals of individual provinces. The program consisted of similar subjects

The law did not mention the teaching language but it was somehow obvious that it assumed German as a teaching language. School administrations and teachers acted according to the provisions of the *The Method Book*, a manual prescribed by the law. The teacher had to know German and the country's language where German was not the mother tongue. The entire chapter which speaks of this is actually a didactic guide for teaching German in a bilingual environment with the sole purpose of training the students for the gradual transition to lessons in German¹⁰. Teaching in Slovenian language was thus allowed under this law only as a kind of necessary evil, as the initial and transitory phase in the transition to lessons in German.

Irrespective of the provisions of the law the school authority was not that negative towards the state language. In the assessment whether to give priority to economic aims of the school (disguised in Enlightenment argumentation) or to German as the means for Germanisation of the population, economic aims prevailed. This was made possible only by having lessons in areas with a predominantly Slovenian population in the language which the majority of children also understood. At the beginning of the school reform the school authorities in Carniola (Kranjska) and Littoral (Primorska) also allowed lessons only in Slovenian language as completely legal, thus supporting Kumerdej's offer to prepare textbooks in Slovenian language. The school authorities of Carinthia (Koroška) and Styria (Štajerska) were much more reserved towards Slovenian language in schools – here lessons were bilingual at best¹¹.

Bilingual lessons of course also assumed textbooks in Slovenian. The authorities made some restrictions here: because lessons should make learning German easier, the textbooks had to be bilingual (German text on the left side, Slovenian translation on the right). The restriction that only textbooks for reading, writing, calculus and religious education can be translated, i.e. subjects which were thought in all three types of primary schools but excluding the subjects being thought in major schools and model schools was more problematic. Here the practice was established to differentiate textbooks for reading lessons on the basis of different school types – only less demanding rural variants of textbooks for *trivial* schools were translated. Despite bilingualism these lessons did not suffice to have Slovenian children learn enough German to continue their education in schools which enabled social ascent. In the words

as in major schools but they were more in-depth. Apart from this these schools had the function of being exemplary schools where future teachers were trained. A detailed description of the organisation and content of teacher education in the monarchy can be found in R. Göner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, Vienna, Österreichischer Bundesverlag für Unterricht, Wissenschaft und Kunst, 1967.

¹⁰ J.I. von Felbiger, *Methodenbuch*, in J. Panholzer (edd.), *Johan Ignaz von Felbigers, Methodenbuch*, Freiburg in Breisgau, Herdersche Verlagshandlung, 1892, pp. 293-294.

¹¹ Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, cit., p. 233.

of Vlado Schmidt there was an idea present at that time that «Slovenian is a language for (religious) instruction of the people and German for education»¹².

This language policy was also in tune with teacher education. This task was assigned to model schools by the law: they were intended to represent norms, an example how teaching was supposed to be practised. Here future teachers were supposed to familiarise with pedagogic subjects, especially with 'the new teaching method', observe classes and train themselves in teacher work. Ljubljana, the capital city of the Carniola (Kranjska) region, got its model school in 1775; its first headmaster was Blaž Kumerdej¹³, which was clear proof of how he was appreciated with Vienna school authorities and the empress. Kumerdej became acquainted with the new teaching method and the concept of teacher education as early as 1773 in the Vienna model school. After his return he began intensive work on establishing a model school in Ljubljana where he had most problems with the provincial government which saw the model school as a completely German school. After acquiring the consent of the court office Kumerdej succeeded in establishing lessons in Slovenian as the auxiliary language in the first years of school, because most children were Slovenians and this made their participation in school even possible. This was also important because teacher candidates who also did not speak German or had difficulties with it participated lessons in the first years within the pedagogic courses for teacher training.

Similarly to Ljubljana Gorica's (Gorizia's) model school organised teacher training in a form where teacher candidates who knew only Slovenian could participate and understand lessons. Here they attended lessons in elementary (preparatory) class of the model school where students knew Slovenian or Italian but not German¹⁴. It was of course desired for teacher candidates to know the country's language and German but these kinds of candidates were in short supply, thus language adjustments were necessary. Slovenian teachers could also be educated in Celovec (Klagenfurt) and in major schools in Celje and Maribor. Our debate here calls for the findings of Vlado Schmidt, the leading researcher of the history of the school system in Slovenia, that the training in the mentioned courses was not only the first pedagogic training in Slovenia, but also the first pedagogic training in Slovenian language which was something new, because up to that point Slovenian language was almost exclusively used for religious education of the people¹⁵.

Under these circumstances there were of course still no conditions for the development of an independent pedagogic thought in Slovenian language. But there were nevertheless first changes in the area of expert literature. From 1777

¹² *Ibid.*, p. 235.

¹³ J. Logar, *Kumerdej, Blaž (1738-1805)*, in *Slovenska biografija*, [Slovenian Biography], <<http://www.slovenska-biografija.si/oseba/sbi309876/>> (accessed: November 21, 2014).

¹⁴ Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, cit., p. 211.

¹⁵ *Ibid.*, p. 212.

on the head of the school commission at the provincial government in Carniola (Kranjska) was Janez Nepomuk Edling. Under his initiative there were meetings of teachers of the Ljubljana model school at least once a month where they discussed pedagogic issues. It was this circle where the initiative was born for the translation of Felbger's excerpt of the Method Book (*Kern des Methodenbuches besonders für die Landschulmeister in den K. K. Staaten*) and the excerpt of this excerpt (*Förderungen an Schulmeister und Lehrer der Trivialschulen, auf deren Erfüllung die bestellten Visitatoren zu sehen und danach sie die Geschichtlichkeit haben*) into Slovenian language, which enabled the Slovenian candidates to study the elemental pedagogic doctrines of the new law in mother tongue. Vlado Schmidt established that *The Core of the Method Book*¹⁶ was not only the first pedagogic book in Slovenian but also the first attempt to use Slovenian language as the language of science¹⁷.

The Political School Constitution from 1805

In the intention to curb the spread of the ideas of the French revolution the Austrian school authorities adopted a new school law which was, with corrections, in force from 1806 until 1869¹⁸. The key characteristic of this law was that the control over school was entirely left to church supervision¹⁹. The conservative orientation of this law also reflects itself in the fact that the organisation of the school system did not change significantly: three types of primary school remained which differentiated children on the basis of classes. Moreover, the area of teacher education essentially remained the same. The distinctive part in the period of the validity of the Political School Constitution is the so-called Sunday schools. The law in Article 311 prescribed priests and teachers in the rural areas the duty to teach youths until their 18th year on Sunday and holiday afternoons – these Sunday schools were intended as continuing or revision schools for those who had already finished their formal education. But because the attendance at school was weak due to child labour,

¹⁶ *Ibid.*, p. 215.

¹⁷ The translation was published in Vienna under the title: *Sern ali vonuzetek teh Metodneh buqui possebnu sa dusbelske uzbenike u zefarskeh kreileveh dushelah* [The Core or Summary of the Method Book Especially for Country teachers in the Lands of the Emperor and King], Vienna, Kurzboek, 1777 (in Slovenian).

¹⁸ After 1818 the Political School Constitution was also enforced in the Kingdom of Lombardy and Venetia. For a description of some systemic and didactic characteristics of this legislation see: S. Polenghi, *Elementary school teachers in Milan during the Restoration (1814-1859): innovations and improvements in teacher training*, «History of education & children's literature», vol. 8, n. 1, 2013, pp. 147-166.

¹⁹ J. Scheipl, H. Seel, *Die Entwicklung des österreichischen Schulwesens von 1750-1938*, Graz, Leykam Verlag, 1987, p. 28.

many Sunday schools gained the function of starting schools – the only schools the rural children attended²⁰. Sunday schools are important for Slovenian school history mainly because of linguistic reasons. These schools had a reasonably high degree of autonomy because of lacking judicial regulation, apart from this they were also supported by the Slovenian clergy which was also supervising the schools. The main initiators of establishing these kinds of schools were priests who also often taught here in Slovenian language. In Carniola (Koroška) and Styria (Štajerska) these schools were also the only schools where Slovenian children were taught in Slovenian language. The lessons in Sunday schools were also the reason for the creation of Slovenian textbooks – the most widespread was the textbook of the later Lavantine and Maribor bishop Anton Martin Slomšek, which was a kind of guide for keeping household, intelligent farming, maintaining health and, most of all, a morally flawless life of the simple rural folk²¹. It is true that the doors for the Slovenian rural population were opened by the Sunday schools²², but without the knowledge of German these children were left without the possibility for educational and with it also social advancement.

The validity of the Political School Constitution in the provinces which the Schönbrunn Peace Treaty separated from Austria (Carniola, a part of Carynthia, Trst /Trieste/, Goriška /Gorizian/, the Austrian Istria and part of Croatia) was annulled in 1809. These provinces were united with Dalmatia and the Venetian part of Istria into the Illyrian provinces by Napoleon. Until 1814, after a new occupation when the Austrians restored the school system to its previous state, school administrative laws of the French government were in place. An essential acquisition of this period was the abolition of differentiated forms of primary school and the introduction of a single four-year primary school. This unified school, unified on the grounds of content, textbooks and teacher education, significantly increased the possibility for further education of Slovenian farmers' children – this was also significantly backed by the order of Marshal Marmont, by which Slovenian was recognised as a school language. This was an important gain in the development of the Slovenian school system. The central Slovenian intellectual of that period Valentin Vodnik wrote almost all the necessary Slovenian teaching books for primary schools and Gymnasiums in the effort for this provision to come to life also in the school practise. But Vodnik was not satisfied with this only: his efforts made Slovenian language not only the language of teaching but also a school subject –for this reason

²⁰ V. Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem* [The History of Schooling and Pedagogy in Slovenia], 3 voll., Ljubljana, Delavska enotnost, 1988, Vol. II, p. 168 (in Slovenian). p. 28.

²¹ A.M. Slomšek, *Blaže ino Nežica v nedeljski šoli* [Blaže and Nežica in Sunday School], Celje, 1842 (in Slovenian).

²² See S. Okoliš, *Zgodovina šolstva na Slovenskem* [History of Education in Slovenia], Ljubljana, Slovenski šolski muzej, 2009, p. 62 (in Slovenian).

he also wrote the textbook of Slovenian grammar for primary schools²³. In Vodnik's work we can see the reflection of the national awakening and a form of the awoken political-national awareness which finally formed in 1848 in the revolutionary programme of *United Slovenia*²⁴.

We have already mentioned that Slovenian language also became the official language in the Habsburg Monarchy after 1848, which meant that national identity of Slovenians was recognised at that time – this enabled the entry of Slovenians into the political life of the Habsburg Monarchy. In the decade after this event, labelled as the time of Bach's absolutism, political life was disabled but it sprang into life again with the introduction of the constitution and political democracy when the general political and national awareness of Slovenians also matured to the degree that Slovenians started affecting the Austrian political life as an independent subject where the main political aim was to unify Slovenian provinces into an autonomous United Slovenia. This demand was also connected with the demand for Slovenian language to become the teaching language of all primary and secondary schools as well as the demand for establishing a Slovenian university²⁵, but this remained unrealised during the time of Austria-Hungary²⁶.

The revolutionary year 1848 brought efforts for changes on the social field as well as on the field of schooling. The document that set out the founding reform of the entire school system in the spirit of the revolutionary demands of the liberal bourgeoisie was entitled *Draft of the Founding Principles of Public Education in Austria*²⁷. This was somehow a summary of all the reform plans that the newly founded Education Ministry planned to implement. The ministry replaced the previous Imperial Education Commission on 23rd March 1848²⁸. The draft focused on primary school education and among others, foresaw the implementation of a unified system of primary schools, greater accessibility to schools at all levels, free public education for the less well-off, broader content of classes, a more comprehensive system of teacher training²⁹ as well as lessons

²³ Ciperle, Vovko, *Šolstvo na Slovenskem skozi stoletja*, cit., pp. 46-47.

²⁴ B. Grafenauer, *Zgodovina slovenskega naroda*, [The History of the Slovenian Nation], Vol. V, Ljubljana, Državna založba Slovenije, 1974 (in Slovenian).

²⁵ J. Prunk, *Kratka zgodovina Slovenije* [A Short History of Slovenia], Ljubljana, Založba Grad, 2008, p. 75 (in Slovenian).

²⁶ Slovenian language became the teaching language only after the disintegration of the Austrian-Hungarian Monarchy in the State of Serbs, Croats and Slovenians (after 1929 in the Kingdom of Yugoslavia) in 1918. It was at that time that the University was established in Ljubljana.

²⁷ *Entwurf der Gründzüge des öffentlichen Unterrichtswesen in Oesterreich* (1848) – reproduced in H. Engelbrecht, *Geschichte des österreichischen Bildungswesens. Erziehung und Unterricht auf Boden Österreichs* 5 voll., *Von 1848 bis zum Ende der Monarchie*, Wien, Österreichischer Bundesverlag, Vol. IV, 1986, pp. 517-520.

²⁸ Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, cit., Vol. II, p. 7.

²⁹ See E. Protner, *The development of private education regulation in the field of teacher training in Slovenia*, «History of education & children's literature», vol. 8, n. 1, 2013, pp. 17-41

in the mother tongue. After the defeat of the revolution the majority of the demands in the area of the Habsburg Monarchy stayed unrealised³⁰. The conservative-oriented Slovenian political leadership of that time did not strive for the revolutionary goals in the field of systematic change of schooling – it did however strive completely for a Slovenian character of schools in the Slovenian ethnic territory. This policy was not only limited to country primary schools, it also demanded Slovenian language at the university, *real* schools and vocational schools. The product of the demands of the revolutionary year in the area of schooling was mainly a bigger presence of Slovenian language on the secondary and temporarily also university level but less on the primary school level. Here Slovenian sooner rather than later remained the means of moral-religious education and less a means of learning German (this was more present in city schools) and education in general³¹. But the position of the Slovenian language was gradually improving in the second half of the 19th century because the political effort to improve the condition was also joined by the teachers who started to articulate expert and status demands in an organised manner after 1848.

Teacher rallies after 1848 and the beginnings of Slovenian pedagogic periodicals

The revolutionary year of 1848 permanently changed the self-perception of primary school teachers: from this time on this professional class was no longer subject to workings of others, it started to strive for its reputation and a better school. The teacher rallies were already predicted by the *The Draft of Basic Principles of Public Lessons*, and they were also officially prescribed by the decree of the educational ministry from 2nd September 1848³². Here teachers were supposed to focus mainly on didactic issues and questions regarding school discipline but soon these issues were joined by demands for higher teacher salaries, higher reputation of school profession, which was also connected with the demand for school to be separated from church control, demands for higher teacher education, better school equipment, publishing of Slovenian pedagogic papers, establishment of pedagogic libraries, extension of the content of primary school subjects, publishing of Slovenian textbooks for all subjects, a

(in partic. pp. 27-28).

³⁰ A bigger change in the field of primary school education came about in the field of teacher education, which was extended to the period of one year (previously it was three months) for the teachers of *trivial* schools and two years for the teachers of major schools.

³¹ See V. Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem* [The History of Schooling and Pedagogy in Slovenia], Vol. III, Ljubljana, Delavska enotnost, 1988, p. 77 (in Slovenian).

³² *Ibid.*, p. 35.

unified secular school supervision and most of all, the introduction of Slovenian language as the teaching language in all primary schools. The revolutionary charge of these rallies diluted after the defeat of the revolution and limited itself to professional pedagogic issues with emphasised religious education. The demand for organisation of teacher education in Slovenian language also stayed unrealised. It was only present as a subject and not even on all teacher training schools as courses for teacher education came to be known from this time on. Gradually these rallies became nothing more than a means of influence of the (conservative) school authorities on teachers, there was also the presence of efforts to lower the gained level of teacher education, which was also shown in the manner that the school authorities deliberately prevented the expansion of pedagogic ideas of Adolf Diesterweg³³, the strongly established didactic expert and advocate of liberal ideas in the area of schooling.

The conservative reaction after 1848 did inhibit a faster enforcement of advanced pedagogic ideas but it could not stop an increasingly higher self-esteem of the teachers who were increasingly aware of their responsibility for the position of education and articulated their demands increasingly clearer in the scope of expert associations—first general cultural associations and from 1860 on also teacher associations. The first teacher association in Slovenia had a highly social tone – it was called *The Association to Help Teacher Widows and Orphans in Carniola* (1860-1918). From the 60s of the 19th century on district teacher associations started emerging in the beginning and were comprised of 20-30 teachers of a certain district and among them also a more broadly designed *The Pedagogic Association for Teachers and Friends of School*³⁴. A bigger expansion of teacher associations came after the adoption of the liberal school legislation in the late 60s which will be described later on. Here we have to point out that the Slovenian pedagogic thought started constituting in the scope of teacher associations in connection with first pedagogic papers, which started emerging after 1848.

The first Slovenian newspaper was published in the years 1797 to 1800³⁵. Later two more emerged which started to be published before 1848 but only the revolutionary mood and the awoken national emotions triggered the emergence of a series of papers in Slovenian language. Here narrow pedagogic-expert topics were occasionally already being present, e.g. teacher rallies and their demands, language and Slovenian textbooks, but the emergence of expert pedagogic papers is of crucial importance for the development of Slovenian pedagogic

³³ *Ibid.*, p. 59.

³⁴ B. Šuštar, *Učiteljske organizacije na Slovenskem in njihova idejna usmeritev od srede 19. do sredine 20. stoletja* [Teaching Organisations in Slovenia and Their Principle Guidelines from the Mid-19th to the Middle of the 20th Century], «Šolska kronika», n. 2, pp. 329-339 (in partic. pp. 331-332) (in Slovenian).

³⁵ A. Gspan, *Razsvetljenje* [Enlightenment], in L. Legiša (ed.), *Zgodovina slovenskega slovstva* [The History of Slovenian Language], Ljubljana, Državna založba Slovenije, p. 151.

thought. The first paper of this kind started to be published in 1852 in Celovec (Klagenfurt, today part of Austrian Carinthia) under the title «Šolski prijatelj» (The School Friend). It was edited by a priest, a teacher of religious education and Slovenian language on the Celovec *real* school. Until 1857 when the paper became a completely religious paper, which published sermons, some articles were published here on the topic of didactic of classes on the elementary stage of schooling, but fundamentally the paper published reports on teacher rallies and new schoolbooks and textbooks. The period of 1867, when the monarchy saw a great political reversal, the pedagogic newspaper titled «Učiteljski tovariš» (The Teacher's Comrade) was also published in Slovenian language. It began being published in 1861. The paper represented highly religious pedagogic principles. Because the paper did not support the new school law of 1869, which took the control over schools from the Church, it gained many opponents from the ranks of teachers who, from 1872 on preferred to adopt the paper of liberal orientation «Slovenski učitelj» (The Slovenian Teacher, 1872-1877). After 1894 the «Učiteljski tovariš» was taken over by *The Federation of Slovenian Teacher Associations* and from that time on it was also a highly liberally inclined newsletter of Slovenian teachers. The newsletter of the mentioned *Federation* was also the magazine «Popotnik» (The Voyager). This magazine started to be published in 1880, from 1900 on with a subtitle *The Pedagogic and Scientific Paper*, which foretold the (ideologically neutral) publishing policy of choosing serious expert and scientific debates although the sympathy toward liberalism could still be felt. As an answer to the grouping of liberally inclined teachers, the teachers who were closer to Catholicism established their own teacher association called *The Slomše's Union* named after the prominent Slovenian bishop from the beginning of the 19th century. From 1899 on, their newsletter was «Slovenski učitelj»³⁶ (The Slovenian Teacher, 1899-1944, it has nothing to do with the aforementioned magazine with the same name). But the expert and scientific level of Slovenian pedagogic thought, which can be seen in the mentioned magazines, already falls within the view of the period after the constitutional reform of the Austrian Empire in 1867 and especially after adopting *The State Primary School Act* in 1869, which will be discussed later on.

³⁶ B. Šuštar, *The teacher as a punisher? School sanctions in Slovenia in educational theory and practice before and after World War I*, «History of education & children's literature», vol. 5, n. 2, 2010, pp. 173-141.

The State Primary School Act from 1869

After 1867 when the Austrian Empire (the Habsburg Monarchy) was converted into a dualistic country with the constitutional treaty (the Austrian-Hungarian Monarchy) the newly elected national assembly got a strong liberal majority which put special emphasis on the modernisation of the school system and the restriction of the jurisdiction of the Catholic church in this area. The outcome of these efforts was the basic state law regarding general citizen rights (1867) which – in contrast to the previous law – left the control over education to the state, however, churches and religious communities were left only to have the control over religious education. After negotiations with the Catholic Church, which strongly opposed the new law, a law was passed on 25th May 1968 about the new relationship between the state and the Church. After this agreement, the Church did not regain the status it had under the previous primary school law (and Concordat from 1855) but it retained its influence on school education by retaining the right to implement and control religious education in state school and by retaining its representation in local, district and regional school boards therefore keeping at least partial control and the possibility to co-decide in matters of school organisation³⁷. Despite relatively high influence on the school system which the Catholic Church retained within the liberal school legislation (both mentioned laws together with the State Primary School Act) this did not satisfy its ambitions – within legal possibilities it started forming private confessional schools³⁸.

The most important acquisition of the (German) liberal parliamentary majority was the State Primary School Act passed on 14th May 1869. This was a modern law³⁹, which enforced many until that time unrealised desires of the revolutionary year 1848 but it did not succeed in meeting the interests of some national groups inside the monarchy⁴⁰. During this time Slovenians were leading a political fight for national rights inside the monarchy. In 1867 they got the majority in the Kranjska regional assembly and eight Slovenian members in the Vienna parliament. Most of these members were liberally oriented but they joined forces with the catholic group in their efforts for higher acknowledgement of the national rights and voted against the new school law.

³⁷ Okoliš, *The history of Slovene education*, in *Slovene Education System Yesterday, Today, Tomorrow*, cit., p. 46.

³⁸ A detailed description in Protner, *The development of private education regulation in the field of teacher training in Slovenia*, cit., pp. 17-41.

³⁹ See *Ibid.* 32 pp. See also V. Schmidt, *Osnovna šola in osnovnošolska zakonodaja pred sto leti*, [Primary Schooling and Primary School Legislation 100 Years Ago], in V. Schmidt, V. Melik, S. Ostanek (edd.), *Osnovna šola na Slovenskem 1869-1969* [Primary Schools in Slovenia 1869-1969], Ljubljana, Slovenski šolski muzej, 1970, pp. 9-29 (in Slovenian).

⁴⁰ See T. Kasper, D. Kasperová, *Die berufliche und nationale Emanzipation der tschechischen Lehrerschaft im letzten Dritte des 19. Jahrhunderts. Motive, Ziele, Erfahrungen und Reflexionen*, «History of education & children's literature», vol. 8, n. 1, 2013, pp. 181-198.

The fear of Germanisation was in the foreground as well as the feeling that the new state school system would be even more German than the old one under the Church control⁴¹. This fear was not unjustified because the teaching language in public schools was decided by regional school boards after consulting parishes which maintained the schools. For Slovenians the unfavourable circumstance was the provision of the Austrian election law which gave priority to economic power of the nation in school boards and parishes instead to their numbers. Thus the language in schools in ethnically mixed areas did not reflect the proportions in the sense of nationality and language but more the proportions of economic power which was mostly on the German side. Despite this the use of Slovenian teaching language in public schools made progress in Carniola and Littoral while the Germanisation pressure in Styria and Carinthia was significantly higher⁴². Statistics show that in 1871 individual provinces had the following percentage of schools with only Slovenian language⁴³:

The Slovenian part of Styria 58,2;
 Carinthia 0,3;
 Carniola 84,1;
 Trst (Trieste) with surroundings 51,4;
 Gorica (Gorizia) – Gradiška 62,0;
 Istria 13,8.

Along with Slovenian and of course German (in Littoral also only Italian) schools there were also bilingual schools. At least in Carniola and the Slovenian part of Styria (Lower Styria) the schools gradually became Slovenian after 1900. The efforts of Slovenian politicians for higher equality and the presence of Slovenian language in primary schools was the constant of their work but the success was not especially high. But as the Austrian central school authorities did actually sometimes loosen their policy regarding the teaching language in primary schools it stayed steadfast regarding teacher training colleges where apart from Koper and Gorica (Gorizia) German language prevailed until the disintegration of the monarchy⁴⁴.

⁴¹ See V. Melik, *Slovinci in «nova šola»* [Slovenians and «New School»], in Schmidt, Melik, Ostanek (edd.), *Osnovna šola na Slovenskem 1869-1969*, cit., pp. 31-63.

⁴² See Okoliš, *The history of Slovene education*, cit., p. 47.

⁴³ J. Sagadin, *Kvantitativna analiza razvoja osnovnega šolstva na Štajerskem, Koroškem, Kranjskem in Primorskem po uveljavitvi osnovnošolskega zakona iz leta 1869 ter kvantitativni prikaz osnovnega šolstva v poznejši Dravski banovini* [A quantitative analysis of the development of primary schooling in the Styria, Carinthia, Carniola and Littoral Regions after the acceptance of the 1869 primary school law and a quantitative presentation of primary schooling in the later Drava provinces], in Schmidt, Melik, Ostanek (edd.), *Osnovna šola na Slovenskem 1869-1969*, cit., p. 126 (in Slovenian).

⁴⁴ A. Žerjav, *Slovenščina kot učni jezik in predmet v osnovnih šolah 1869-1969*. [Slovenian as the Teaching Language and School Subject in Primary Schools 1869-1969], in Schmidt, Melik, Ostanek (edd.), *Osnovna šola na Slovenskem 1869-1969*, cit., p. 417 (in Slovenian).

The Importance of the Teacher Training Colleges for the Development of the Slovenian Pedagogic Thought

The introduction of the four-year male and female teacher training colleges was undoubtedly one of the most important acquisitions of the third Austrian primary school act. It is a law which by far exceeded previous no-more-than-two-year teacher courses regarding the level of general and expert education of the future teachers and became the standard for almost an entire century not only in the lands of the Austro-Hungarian Monarchy but also on a wider scale⁴⁵. We cannot describe all the systemic and didactic dimensions of the new teacher training legislation here but we have to point out higher knowledge standards which were expected of future teachers from this time on, as well as greatly extended expectations towards teachers which could teach at teacher training schools. These teacher positions were taken by the most competent teachers in the local environments and the position of the director was usually linked to teaching the basic subject at the teacher training school: pedagogy together with practical exercises. Their education was normally not of pedagogic nature but they were expected to follow pedagogic theoretical currents and implement them not only in the work of their institution but also into school environment. Normally the directors of teacher training schools were also district school supervisors, which gave them expert as well as formal authority. All these were good starting points for a more intensive development of pedagogy as the science about education which was at that time – especially in Germany where pedagogy was already present at some universities – at a high theoretical level and was acknowledged as the basic component of teacher professional qualification. The most important obstacle for a more intensive

⁴⁵ The extent of the influence of this law and the regulation of teacher training schools can be seen from the thematic section of the issue: S. Polenghi, E. Protner, *The development of teacher education in the countries of Central and South-Eastern Europe*, «History of Education & Children's Literature», vol. 8, n. 1, 2013, pp. 11-15. After the disintegration of Austria-Hungary the basic characteristics of this law were not only preserved in the countries which were part of the monarchy – e.g. Croatia (see, in the same issue: Š. Batinić, I. Radeka, *The development and prospects of teacher education in Croatia*, «History of Education & Children's Literature», vol. 8, n. 1, 2013, pp. 43-62) and Bosnia and Herzegovina (see. S. Šušnjara, *The position of teachers in Bosnia and Herzegovina during the Austro-Hungarian Monarchy*, *ibid.*, pp. 85-106) but also in countries which joined the Kingdom of Serbs, Croats and Slovenians after the disintegration of Austria-Hungary and gradually assumed the basic characteristics of the Austrian regime of teacher training (N. Vujisić Živković, V., Spasenović, *The development of primary school teacher education in Serbia in the 19th and the first decade of the 20th century*, «History of Education & Children's Literature», *ibid.*, pp. 63-83; S. Miovska-Spaseva, *Development of primary teacher schooling in Macedonia (1869-1963), Roots and fruits of a century-long tradition*, «History of Education & Children's Literature», *ibid.*, pp. 129-146; V. Zorić, *The development of primary school teacher education in Montenegro*, «History of Education & Children's Literature», *ibid.*, pp. 107-127).

development of the pedagogic thought in Slovenian language was the fact that the prevailing language in teacher training colleges was German.

The teaching language in teacher training colleges in Austria-Hungary was determined by the Minister of Education on the basis of the proposal of the regional school authorities. The 31st Article of the State Primary School Act determined that «the pupils have to have the opportunity to be educated in another regional language, so that they achieve the qualifications possibly also in this language»⁴⁶. Let us examine how this provision was exercised in Slovenia.

The following state⁴⁷ teacher training colleges were established on the territory where Slovenians lived under the Austrian-Hungarian Monarchy after the enactment of the State Primary School Act: In Carniola the male teacher training college in Ljubljana was established in the school year of 1870/71 and the female teacher training school a year later. That year the Ministry of Education allowed to have education in Slovenian language (only on the male teacher training college) for the following subjects: religious education, practical lessons, reading, Slovenian language, methodology of mathematics, physical education and farming and in the first two years also science, geography and history, however from the following year on the last three subjects were allowed to be taught only in German and from German school books. This triggered opposition from Slovenian teacher associations and a demand for the establishment of completely Slovenian teacher training schools in Ljubljana, Maribor and Celovec (Klagenfurt). But because of the predominance of German teachers on this teacher training school not even the prescribed subjects were taught in Slovenian language. It was the teachers of this teacher training school who established a German teacher association in 1873 (*Krainischer Schulverein*) and the newsletter of this society in German («*Laibacher Schulzeitung*»), which were in constant dispute with Slovenian teachers⁴⁸.

⁴⁶ *Gesetz vom 14. Mai 1869 (R.-G.-Bl. Nr. 62. – M.-V.-Bl. 1869, Nr. 40), durch welches die Grundsätze des Unterrichtswesens bezüglich der Volksschulen festgestellt werden, und Gesetz vom 2. Mai 1883 (R.-G.-Bl. Nr. 53. – M.-V.-Bl. 1869, Nr. 15), womit einige Bestimmungen des Gesetzes vom 14. Mai 1869, R.-G.-Bl. Nr. 62, abgeändert werden (Das Reichsvolksschulgesetz), in Das Reichsvolksschulgesetz samt dem wichtigsten Durchführungs-Vorschriften einschließlich der definitiven Schul- und Unterrichtsordnung für allgemeine Volksschulen und für Bürgerschulen, Wien, Im kaiserlich-königlichen Schönböcker-Verlag, 1906, pp. 3-24.*

⁴⁷ We have named only state teacher training colleges. Private teacher training colleges are described in detail in Protner, *The development of private education regulation in the field of teacher training in Slovenia*, cit.

⁴⁸ F. Strmčnik, *Razvoj izobraževanja osnovnošolskega učiteljstva na Slovenskem v obdobju od leta 1869 do razpada Avstro-Ogrske* [The Development of Primary School Staff Training in Slovenia Between 1869 Until the Fall of the Austro-Hungarian Monarchy], in Schmidt, Melik, Ostanek (edd.), *Osnovna šola na Slovenskem 1869-1969*, cit., p. 375 (in Slovenian). Apart from state teacher training colleges there were also private teacher training schools in Slovenia established by nuns in Ljubljana, Škofja Loka and Maribor (see Protner, *The development of private education regulation in the field of teacher training in Slovenia*, cit.). Slovenian language

In Littoral there were three teacher training colleges established within the new school law, those were in Trst (Trieste) and Koper (Capodistria) with Italian as teaching language and in Gorica (Gorizia), which had a Slovenian and Italian department. Because of rationalisation the teacher training college in Trst (Trieste) was discontinued in 1875, the one in Gorica (Gorizia) was changed into a female teacher training college with Slovenian-German and Italian-German departments, and the one in Koper (Capodistria) was reorganised to have Italian as teaching language, German as the compulsory subject for all students and Slovenian as the compulsory subject only for those who wanted to work in Slovenian schools. This teacher training college had three departments: Italian, Slovenian and Croatian but the number of students in the Slovenian department was in all the years as large as the Italian and Croatian combined. The dissatisfaction with the location of the teacher training college and the position of Slovenian language led to the renewed relocation of the Slovenian department to Gorica (Gorizia). Despite the opposition of the Italians of Gorica (Gorizia) this happened in 1909. This department developed into the independent male teacher training college with Slovenian-German teaching and official language until 1912, when this teacher training college became completely Slovenian. The male teacher training college in Gorica was the first and only state secondary school in Austria-Hungary with Slovenian as teaching and official language⁴⁹.

In the Slovenian part of Styria the teacher training college was established in Maribor in 1869. Although most students in this teacher training school in years up to the disintegration of Austria-Hungary were of Slovenian nationality the teaching language was German all this time for all the subjects, Slovenian was a compulsory subject only for students of Slovenian nationality⁵⁰. In 1902 there was also a regional female teacher training college established in Maribor and the students here were also mainly of Slovenian nationality. Slovenian language was taught here as only an «optional» or also as «relatively compulsory» subject⁵¹.

Slovenians attended the teacher training college also in Carynthia where a male and female teacher training college was established in Celovec (Klagenfurt) in 1869. Here there were less Slovenian pupils than in Maribor yet around 15% on average. Despite this Slovenian language was also present here only as an optional subject. The female teacher training school in Celovec (where

was more present in these teacher training schools than in state teacher training schools but no significant influence on the Slovenian pedagogic thought can be measured from the teachers of these circles.

⁴⁹ M. Cencič, *Šola za znanje učiteljev* [School for Teacher Knowledge], Koper, Založba Anales, 2004, p. 36; Strmčnik, *Razvoj izobraževanja osnovnošolskega učiteljstva na Slovenskem v obdobju od leta 1869 do razpada Avstro-Ogrske*, cit., p. 345 (in Slovenian).

⁵⁰ *Ibid.*, p. 371.

⁵¹ *Ibid.*, p. 372.

Slovenian language was not even provided as an optional subject) ceased to operate in the school year 1880/81 because of saving policies⁵².

In the period up to the 3rd Austrian primary school act the teachers had already written some of the pedagogic texts in Slovenian language. Along with textbooks which deal mostly with didactics of Slovenian language teaching, we can also find practically oriented articles about teaching individual subject. It was only after establishing teacher training colleges and the formation of national identity of Slovenian teachers when the need arose for Slovenian pedagogic textbooks because the practice where Slovenian teacher candidates, while preparing themselves for work in Slovenian schools, studied German textbook literature became more and more unbearable. This became especially evidently controversial in specialised didactics of individual subjects which (as seen from examples of the male and female teacher training colleges in Ljubljana) were taught in Slovenian language but on the basis of German literature. This inconsistency and thus the need for Slovenian specialised didactic-practical guidelines for the work of a teacher in a classroom was the reason for the emergence of first Slovenian pedagogic (didactic) textbooks. This work was taken up by Ivan Lapajne, who was not a teacher in the teacher training college but the headmaster of a bourgeois school and a zealous advocate of the new school law and a fighter for the position of Slovenian language in schools. It was he who advocated for a united Slovenian teacher association for all Slovenian regions on the general assembly of the Teacher Association for Carniola which triggered national differentiation – as an answer to this call the teachers of German nationality established the *Krainischer Lehrerverein* (The Kranjska Teacher Association). Lapajne self-published a thin booklet with the title *The Carniola Public School System*⁵³, as early as 1871 where he described the bad position of the school system and teachers, however the books titled *Prvi poduk – navod za poučevanje na najnižji stopnji narodne šole z ozirom na Razinger-Žumerjev Abecednik za slovenske ljudske šole* (First Lessons. Instructions for Teaching on the Lowest Level of National School Regarding Razinger-Žumer's Speller for Slovenian Public Schools) and *Praktična metodika za učitelje in učiteljske pripravnike* (Practical Didactics for Teachers and Teacher Candidates) from 1882 were far more important for the development of the Slovenian pedagogic thought. In both cases the material is more of a handbook type, but the books can also be thought of as the first Slovenian expert pedagogic books which were not translated from German⁵⁴.

It was not long from the publication of the first didactic handbooks until the demand arose for writing fundamental pedagogic textbooks. In 1884 Lapajne

⁵² *Ibid.*, p. 346.

⁵³ I. Lapajne, *Kranjsko ljudsko šolstvo* [The Carniola Public School System], Ljubljana, [self-publishing], 1871 (in Slovenian).

⁵⁴ As in the aforementioned translation of Felbiger's book.

warned that here we significantly lag behind the Croats where the same year Stjepan Basariček published the final part of *Pedagogija* (Pedagogy)⁵⁵. He was of the opinion that there are many teacher candidates who would like to study pedagogy from Slovenian books (along with German ones). The importance of Slovenian pedagogy can also be seen in the formation of domestic expert terminology: «Until Slovenian teachers do not write our own good pedagogy ourselves and create Slovenian pedagogic terminology we will always have a problem with writing and addressing pedagogic issues»⁵⁶.

The actual milestone in the constitution of the Slovenian pedagogic thought came when the idea matured that it is necessary to write a textbook of pedagogy in Slovenian language. In the first years after the enforcement of the new organisation of teacher training there were still old pedagogy textbooks in use, which were not adapted to the higher demands of the new lesson plans in teacher training colleges. After 1877 the textbooks of Gustav Adolf Lindner *General Education Science* (Allgemeine Erziehungslehre) and *General Didactics* (Allgemeine Unterrichtslehre) won recognition. The first textbook saw 19 printed issues and the second one 10⁵⁷. Even before this the textbook written by Josef Mich⁵⁸ *Očrt občega vzgoje- in ukoslovja* (Outline of General Education Science and Didactics) was highly widespread—it was later rewritten as two separate textbooks. Gönner's statement is also true for Slovenia, namely that Lindner's and Mich's textbooks were used for decades with «a certain exclusiveness»⁵⁹. These were of course textbooks in German because pedagogy and didactics were only taught on teacher training schools in German. The situation changed at least regarding the language on qualification exams for teacher profession in 1886 when the Ministry Order No. 6033 issued on the 31st July 1886 enabled (partial) passing of the qualifications exam for public and bourgeois schools also in Slovenian language⁶⁰. This encouraged F. Gabršek to translate into Slovenian first Mich's pedagogy in 1887⁶¹, and his didactics the

⁵⁵ In line with the understanding of pedagogy of that time and also regarding the subjects on teacher training colleges pedagogy was divided into the doctrine of education (normally together with psychology), the doctrine of teaching (didactics-usually together with logic), special didactics and history of pedagogy.

⁵⁶ I. Lapajne, *Iz Krškega* [From Krško], «Učiteljski tovariš», n. 17, 1884, p. 272 (in Slovenian).

⁵⁷ W. Brezinka, *Pädagogik an der Universitäten Prag, Graz und Innsbruck*, Band 2, Wien, Verlag der Österreichischen Akademie der Wissenschaften, 2003, p. 61.

⁵⁸ J. Mich, *Grundriß der allgemeinen Erziehungs- und Unterrichtslehre*, Vienna, Verlag von A. Pichlers Witve & Sohn, 1872.

⁵⁹ Göner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, cit., p. 207.

⁶⁰ *Verordnungsblatt für den Dienstbereich des Ministeriums für Kultus und Unterricht*, Verlag des k. k. Ministeriums für Cultus und Unterricht, Wien 1886.

⁶¹ J. Mich, [F. Gabršek, translation], *Občno vzgojeslovje* [General Education Science], Ljubljana, «Pedagoško društvo» v Krškem, 1887 (in Slovenian).

following year⁶². These two textbooks can be regarded as the first pedagogic textbooks in Slovenian language.

Parallel to and independently from these two more textbooks of pedagogy were published at this time. In 1888 this was the textbook titled *Pedagogika*⁶³ (Pedagogy) published by Anton Zupančič, a teacher of pedagogy on the theological seminary in Ljubljana. His foreword explained that Ljubljana «has close to twenty years of pedagogical teaching in Slovenian language but so far we have not had a domestic book of this kind»⁶⁴. He also explained that the same textbook was used here as in the teacher training college but «since the school and together with it also the textbook is no longer religious, the catholic priests could not and were not allowed to help themselves with this kind of teaching material – we felt a living need of the Slovenian pedagogy written in catholic spirit»⁶⁵. Our first non-translated textbook (but also eclectically written with the help of other sources) in Slovenian language thus arose from mainly religious reasons. This is the time when pedagogic theory is so developed and varied that it is possible to feel a certain theoretical pluralism which is indicated by the following textbook from this period. It was written by Franc Kos⁶⁶, a teacher on the teacher training college in Gorica (Gorizia). His foreword also exposes the fact that he took up writing the textbook of pedagogy in the hope that this subject will soon be taught in Slovenian language, but he also states that when he started writing the textbook he did not know that there is another textbook in Slovenian in preparation (he was obviously thinking about Zupančič's and Gaberšek Mich's textbook). Similarly as Zupančič's material this textbook was also written eclectically. The author did avoid mentioning the sources on the basis of which he wrote the work but he did state that he took after Lindner's book in many respects because this is the most widespread in those teacher training colleges attended by Slovenian pupils.

The discussed textbooks had the endeavour for establishing the pedagogic thought in Slovenian language in the foreground more than the endeavour for theoretical originality and the formation of the pedagogic thought which was supposed to follow national logic and local circumstances. Although textbooks of Kos and Mich Gaberšek were written on the basis of – at that time predominant – Herbartianist pedagogic doctrine, the theoretical background remains to a large extent non-reflective and shows the state of pedagogic theoretic underdevelopment. The largest range of theoretic thought is linked to

⁶² J. Mich [F. Gabršek, translation], *Občno ukoslovje* [General Didactic], Ljubljana, «Pedagogičsko društvo» v Krškem, 1888 (in Slovenian).

⁶³ A. Zupančič, *Pedagogika*, [Pedagogy], Ljubljana, Katoliška bukvarna, 1888 (in Slovenian).

⁶⁴ *Ibid.*, pages not numbered.

⁶⁵ *Ibid.*

⁶⁶ F. Kos, *Vzgojeslovje* [Science of Education], Ljubljana, Matica Slovenska, 1890 (in Slovenian).

the discussion about the consistency or inconsistency with religious doctrine. A larger reversal happened only a few years after.

The Emancipation of the Slovenian Pedagogic Thought with the Background in Herbartianism

When we speak about the emancipation of the Slovenian pedagogic thought we of course do not mean the division from foreign theoretical currents – something like this would of course also be inconsistent with the logic of scientific research. Here we mostly mean the degree of theoretical reflection which would enable the identification of national interests in connection with leaning on pedagogic theory, formation of recognisable programme guidelines and searching for self-expression in a multinational environment of the monarchy. The milestone in the development of the pedagogic thought happened in 1893 when the headmaster of the teacher training school in Maribor Henrik Schreiner⁶⁷ stood up for the implementation of Herbartianist pedagogic theory in his report on the assembly of the *Federation of Slovenian Teacher Associations*, which was supposed to be, as a leading scientific paradigm, the guide in generating reformist efforts in the field of the school system.

Here we do not have the space to describe all the dimensions of Herbartianist pedagogic theory in the Central-European area⁶⁸, but it is true for other countries as well as Slovenia that this pedagogic paradigm represents the basic support in the professionalising of teacher work⁶⁹. Schreiner was aware of Herbartianism being the leading scientific paradigm but at the same time he was aware of certain exaggerations – he was familiar with the critique of Herbartianism which was very loud at the end of the 19th century and on this basis he refuted the Herbartianist idea of cultural-historical steps and the concentration of lessons; on the other hand he supported the didactic concept of formal steps with a common-sense distance and it is thanks to him that the concept was generally enforced in Slovenian schools. Here we are not only talking about theoretical justification and support. In connection with this Schreiner set up a whole logistic system of introducing the didactic update (formal steps) in school lessons. He

⁶⁷ His contribution to pedagogy in Slovenia is described in detail in E. Protner, *Wege der Durchsetzung des Herbartianismus: am Beispiel Sloweniens*, «History of education & children's literature», vol. 9, n. 1, 2014, pp. 431-450.

⁶⁸ An overview of literature from this field, development orientations and specifics of the presence of this pedagogic paradigm in Slovenia are presented in E. Protner, *Herbartianism and its educational consequences in the period of the Austro-Hungarian Monarchy: the case of Slovenia*, Frankfurt am Main *et al.*, Peter Lang, 2014.

⁶⁹ See P. Metz, *Herbartianismus als Paradigma für Professionalisierung und Schulreform*, Bern *et al.*, Peter Lang, 1992.

was introducing the didactic concept of formal steps as the headmaster of his own teacher training college, as a regional supervisor he recommended it to teachers in schools in the region and triggered a debate on its implementation also in teacher societies in other parts of Slovenia, as a pedagogic authority he advocated it on national teacher assemblies, as a pedagogic theorist he justified and defended it in expert pedagogic print, he also wrote school textbooks for elementary classes in the scope of the didactic concept of formal steps. His most distinctive work in his effort for implementing modern pedagogic ideas in the scope of the Slovenian pedagogic thought is the founding of the Publishing House of the Slovenian School Society (*Slovenska šolska matica*) which he led from its establishment in 1900 until his death (1920). The editorial policy of school and pedagogic textbook publishing was not only in tune with the didactic concept of formal steps but also with the demand which was formed in the circle of Slovenian teacher associations to omit realistic content in primary school readers and replace it with belles lettres. Let us see what we are talking about.

The book *The Curriculum for City Schools and Various Categories of Folk schools* – published on 18th May 1874)⁷⁰ explains in its initial part *the principle of concentration of lessons*, which should especially prevent premature implementation of subject lessons. The lessons of realities in lower and middle grades had to be entirely dealt with in the scope of the *reader*. In one-class, two-class and three-class folk schools special textbooks for real subjects were forbidden. Special textbooks for individual subjects could be used only from 4th year on in four- and multiple-class schools. Only officially recognised textbooks could be used, teachers could choose among them at official conferences. Because most schools in Slovenia were organised in a lower manner the textbooks (and primers) were the most widespread and used textbooks. Content-wise these readers covered all real areas: local studies, history, geography, natural science, rules of social life as well as belles lettres⁷¹.

Schreiner advocated for a different concept of readers in 1892 at the 5th Styria teacher conference⁷², where his thesis that teachers should debate the renewal of readers at teacher conferences where realistic content should be replaced by

⁷⁰ *Verordnung des Ministers für Cultus und Unterricht vom 18. Mai 1874, Z. 6549, an die Landesschulbehörden, mit ausnahme jener von Galizien, betreffend Lehrpläne für Bürgerschulen und für verschiedenen Kategorien der allgemeinen Volksschulen*, in *Verordnungsblatt für den Dienstbereich des Ministeriums für Cultus und Unterricht*, Verlag des k. k. Ministeriums für Cultus und Unterricht, Wien 1874, pp. 187-239.

⁷¹ See E. Protner, *Volksschullesebuch als Mittel der Etablierung der herbartianistischen Pädagogik in Slowenien. V: Internationale Konferenz Pädagogische und kulturelle Strömungen in der K.U.K. Monarchie*, in A. Németh, V. Pirka (edd.), *Pädagogische und kulturelle Strömungen in der K.U.K. Monarchie II.: eine Sammlung aus den Beiträgen der internationalen Konferenz*, 24.-25. April 2009, Fürstenfeld, «Neveléstörténet», n. 1-2, 2010, pp. 134-143.

⁷² *Peta štajerska učiteljska konferenca* [The Fifth Carniola teacher conference], «Popotnik», n. 18, 19, 20, 1892, pp. 275-278, 289-291, 306-308 (in Slovenian).

belles lettres was accepted. It is an idea which has a distinctively Herbartianist origin – Stoy's demand that an 'ideal reader' has to have only classical and contemporary artistic content was in the foreground⁷³. Schreiner's initiative was realised already two years later at the 6th main assembly of the Union of Slovenian Teacher Societies in August 1894 in Gorica (Gorizia)⁷⁴. Although the debate featured different views they achieved a consensus which is reflected by the *Memorandum of the Union of Slovenian Teacher Societies Regarding the Reform of Folk School Readers*⁷⁵ from 1895, which was addressed to the Ministry for Education. Here the authors pointed out that the folk school reader must not be a sort of encyclopaedia of all sciences and that extensive realistic content does not belong in it, this was also argued from a didactic viewpoint. The proposal to have the ministry organise the reform of the readers in a manner which also includes participation of primary school teachers in the preparation of new readers under the supervision of Henrik Schreiner also deserves special attention⁷⁶.

Unfortunately, we did not succeed in establishing whether the ministry officially responded to the Memorandum but obviously there were no restraints because the first reader which was in tune with the demands of the Memorandum was published in the emperor's publishing house in Vienna as early as 1897. This elementary reader for 1st grades was followed by four more readers for higher classes of the lower levels of education in the period from 1902 to 1909, which were published by Schreiner and Fran Hubad (at that time the regional school supervisor in Carniola). The statutory provision to treat real classes in lower and middle levels with a textbook was complied by Schreiner and Hubad by arranging the content after the dispositions of real lessons, but the factual descriptions in their *Reader* were replaced by belles lettres of (mostly) Slovenian literates⁷⁷.

The extent of this reform is further illustrated by the fact that the editorial policy of the Publishing House of Slovenian School Society which further supported the reform by issuing handbooks for teachers and provided a consistent didactic concept of lessons in Slovenian schools completely adjusted itself to the reform of the reader. In the first years the publishing house issued publications which brought examples of didactic articulations of individual

⁷³ B. Maenel, *Lesebuch in der Volksschule*, in W. Rein (ed.), *Encyklopädisches Handbuch der Pädagogik*, 2nd edition, Langensalza, Beyer & Mann, 1906, vol. V, pp. 584-591.

⁷⁴ *Šesti glavni zbor «Zaveze slovenskih učiteljskih društev» v Gorici*. [The Sixth Main Assembly of the «Union of Slovenian Teacher Societies» in Gorizia], «Popotnik», n. 15, 16, 17, 18, 20, 1849, pp. 225-227, 241-244, 257-260, 273-276, 310-314 (in Slovenian).

⁷⁵ *Spomenica «Zaveze slovenskih učiteljskih društev», tičoča se preosnove ljudskošolskih čitank*. [The Memorandum of the «Union of Slovenian Teacher Societies» referring to the reorganisation of folk school readers], «Popotnik», n. 11, 1905, pp. 161-165 (in Slovenian).

⁷⁶ *Ibid.*, p. 163.

⁷⁷ Protner, *Volksschullesebuch als Mittel der Etablierung der herbartianistischen Pädagogik in Slowenien*, cit.

school lessons – mainly this was a display of the use of formal steps. The second set of publications supplied teachers with texts which were supposed to replace real content from previous readers in the collection *The Real Library* (and the subtitles *The Collection of Teaching Material for Real Lessons in Folk Schools* and *The Auxiliary Book for Teachers*). The education and didactic preparation of teachers for the new concept was thus well looked after but the question of student access to real teaching content remained unanswered because the new readers did not contain them any more. This new concept was not unanimously supported by Slovenian teachers but the controversies which were triggered along with them point to a high level of pedagogic discourse which the Slovenian pedagogic thought reached in the time before the disintegration of the Austrian Hungarian Monarchy.

Conclusion

We have outlined the development of the Slovenian pedagogic thought from its humble beginnings, when Slovenian language barely enabled the translation of school legislation, along a gradual constitution of expert terminology for the needs of writing pedagogic textbooks in Slovenian language, to the creation of a theoretical framework which enabled the recognition of national interests and the formation of infrastructure in the service of expert support of the school system. This development was embedded into national disputes and germanisation's pressures which inhibited the spread of the national school system and the pedagogic thought. For the purpose of understanding the development of pedagogic theory in this area we have to point out that this was a theory which was co-created by teachers for teachers and for solving concrete problems of school as well as family education. When 1919 saw the establishment of the first Slovenian university in the new country and pedagogy became an academic discipline at the Faculty of Arts this meant a wholly new quality of development of the pedagogic thought but we cannot unambiguously claim that the academically grounded pedagogy significantly helped the quality of education in Slovenian schools.

The identity of the schoolbook as textual genre and as mediation of cultural construction of the educated citizenship

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ABSTRACT: This paper looks into the question of the identity of the schoolbook as a specific text genre in the context of classical and modern manualistics, contextualising the analysis within the framework of the culture of the traditional school and in the era of the digital revolution and from a historiographic and theoretical perspective. It also sets out the birth and early development of manualistics as an intellectual and academic field and its contributions to the definition of the textual identity of the schoolbook, and in the cultural construction of citizenship.

EET/TEE KEYWORDS: Textbooks; Education; Information Technology; School culture; Spain; XX-XXI Centuries.

1. *The manual, a text with identity*

The schoolbook is, in effect, a specific type of text which appear in print or on the net. Nowadays, no one mistakes a manual, be it in hard copy or on the monitor screen, for another text type. It may be said that the schoolbook is a text genre with its own attributes and is recognised as such by the individuals who use it and by the society in which it circulates as a consumer good. Furthermore, especially in recent decades, scholars have assigned a special statute to the school text as a source of knowledge for the study of school culture and the modes of sociability of minors in teaching institutions and have even constructed a new field of study, manualistics¹.

¹ See: A. Escolano (ed.), *Historia ilustrada del libro escolar en España*, 2 vols., Madrid,

In its printed version, a schoolbook is easily identifiable thanks to:

- Its *format*. The structure, size and material model of the schoolbook is unmistakable. Its external signs show that it is a printed product for people receiving education, that is to say, a text with its own identity.
- The *cover design*. This is the doorway into the manual, a kind of poster which functions as a lure with typographies, shapes and colours which stimulate the children and young people at whom it is aimed. It is in part a motivating poster which announces the book's contents, with a specific aesthetic style and with other symbolic and communicative resources.
- The *layout (mise en page)*. Its internal organisation, the distribution of the graphic space on the page, the use of resources to orient its reading for study and other elements of the textual layout reveal that it is designed as a guide to the process of learning and teaching. This characteristic also attributes identity to the schoolbook.
- The *illustrative strategies* which it uses as iconographic rhetoric associated to the writing. The textuality of the manual is usually a mixture of images and words, harmonised according to certain informative, aesthetic and didactic strategies which intervene in the communication of the contents and even in the activation of attitudes.
- And even the *implicit reader* underlying its textuality. Every book designed for teaching All books designed for teaching have a reader *in fabula*, a certain type of presumed individual who behaves according to a protocol of partly predetermined actions, albeit with some degree of indetermination. This implicit reader is specific to the manual and is different from the readers of other text types.

In its *digital version*, the writings which circulate on the Internet and are used in teaching, albeit more *contingent* and indefinite, sometimes mimic the geometry of conventional didactic texts, and, when surfing their pages, the people who use them form structures which give shape and meaning to the knowledge according to practices which regulate the learning processes. Thus, it may be said that digital text is partly adapted, on being manipulated, to the logic of the printed text, influenced in this case by school culture.

It is true, as Pierre Lévy noted, that hypertext is in continual metamorphosis: it creates nodes and links with heterogeneous elements, it generates reticulated models which are partly text fractals and works according to a polycentric dynamic². But it is also true that subjects, when constructing the text in intra-school processes, introduce in the resulting textuality a certain geometry which is related to their cognitive habitus, acquired above all during their school

Fundación G.S. Ruipérez, 1997-1998; and Id., *The historical construction of manualistics in Spain*, «Paedagogica Historica», vol. 38, n. 1, 2002, pp. 51-72.

² See P. Lévy, *¿Qué es lo virtual?*, Barcelona, Paidós, 1999.

experience. School culture is, therefore, a determining factor in the governability of the contingency of the texts circulating on the Net.

However, it is true that, when constructing the text in intra-school processes, subjects introduce in the resulting textuality a certain geometry related to their cognitive habitus, acquired above all during the school experience. School culture is, therefore, a determining factor in the contingency governability of the texts circulating in Internet. In this way, then, transformed into architecture influenced by the stereotype of the manual on screen or once printed, the resulting text reflects many of the characteristics of the conventional printed book.

In relation to the above, it may be said that the reader's subjectivity transforms the hypertext, with a certain degree of freedom, into a form of textuality reconfigured from the patterns of culture fostered by the school, i.e. from those writings related to manualistics practice. When the bits of the Net do not fit these norms, and the user surfs freely, textuality dilates and even produces, by means of fragmentation, links or folds in digital space, three dimensional virtual effects³, but the readers' mental structures appropriate the lexias and geometrically structure the inorganic material of hypertext according to norms which are in part modelled by the habits transmitted by the school.

2. *The manual as generational icon and national symbol of citizenship*

The traditional school manual is also identified as a textual construct accommodated to certain sociological requirements. It is a text which may be politically conditioned insofar as it cannot escape the limits of content and values set by the government. As a *mechanism of cultural normalisation* of each target age group, the schoolbook is an exponent of a certain sociological code, if we are looking for a representation of the standards which the community requires as norms for schoolchildren in any particular period.

Furthermore, unlike other books which circulate according to the liberal market laws, the schoolbook is an *intervened cultural product*. Firstly, because of the 'cultural' intentions of the 'authors' – considering this category in its most general, and not just personal sense – who created it. Secondly, because of the control systems which regulate the so-called politics of the book. Finally, because of the 'cultural' criteria of those who select and use it as a text. In the case of the electronic book, the intentions are less visible but they also underlie the 'interests' of the players in the communicative pragmatics of the information society and, of course, in the use made of the knowledge by the subjects.

³ A. Rodríguez Heras, *Qué es un (hiper)texto*, in R. Chartier (ed.), *¿Qué es un texto?*, Madrid, Círculo de Bellas Artes, 2006, p. 89 ff.

The identity construction of the school manual is socially strengthened under two important conditionings. One refers to the character of *generational icon* that a school text may achieve. Each generation identifies itself with the books in which a shared *bildung* was founded among peers and the contents and images of these texts has become part of the narrative identity of the subjects and of the social ‘imagineering’ of a particular period. The other conditioning derives from the function attributed to the school manual as a *symbol of a national culture* which is supposed to be summarised in the school tradition.

Going even further, Alain Choppin, one of the pioneers of manualistics in Europe, has found in the classical and modern school manual a symbol of national cultural identity since societies will have used it in order to fix and perpetuate their characteristics, their values and their traditions⁴. In the same way as the coins and the postal stamp, the school book, subject to the control of the system since the origins of the liberal State of the 19th Century, is a controlled national product which not only transmits the official language of a country but also its patriotic symbols and values which constitute the bases of the sociability of all the minors within the social network, i.e. the codes of the identifying cohesion of a nation. Hence those groups which wish to be accepted as national cultures between fight to ensure their control over the books used in the state schools.

Hypertext is changing the function which was performed by the traditional text as transmitter of the codes of sociability. The contents of the *lexias* may carry cognitive socialising values and schemes because, among other reasons, the media and their forms in themselves imply messages and therefore express cultural patterns which are, to a great extent, shared. However, this is not the same as what happened with the previous texts. The *ethos* of the classical manuals was a cohesive discourse, structured hierarchically around the norms of truth (in the foucaultian sense), defined *a priori* by the intelligentsia, which gave governability to the system. However, values in the digital media are a construction of meaning which the subjects are continually elaborating and modifying in the interactivity and connectivity, two attributes which formally seem to be better equipped for social and cultural democracy and even to be the antidote to dogmatisms, unless it is suspected that, under their innocent syncretism, lies the logic of the visible and invisible powers that be of globalisation and of the Net-society.

However that may be, it seems to be clear that the dissolution of the directive text is coherent with the discursive crisis shown by postmodernity, in which the great narratives have lost legitimacy and in which the supreme value lies in the performability which regulates the communicative and instrumental interaction of the internavts. And, as the new communicative ecosystems not

⁴ A. Choppin, *Introduction*, in Id., *Manuels scolaires. États et sociétés*, Paris, Editions Histoire de l'Éducation INRP, 1993, 58, pp. 5-9.

only transform the narrative acts but also the resulting narrations, it seems plausible that those same norms of media rhetoric are established as narrative and value, i.e., in the ethos of hypertextual hermeneutics.

The consequences of these changes in the world of education and in the constructions of pedagogical knowledge and educational pragmatics are of extraordinary complexity and the school culture, subject to so much inertia and resistance, has still not evaluated, and much less assimilated, the seriousness of said transformations. Regarding the symbolic meaning which books had in the past, it seems evident that the digital constructions have lost identifying value, although they may be the expression of the prevailing styles in the context of the «liquid modernity», to use the well-known expression of Zigmunt Baumann⁵, and may be the expression of an imaginary transnational collective.

3. *Interactions and syncretisms in the digital era*

Despite the plausible veracity of the previous observations, something else might be occurring today in the interaction between text and hypertext or between manual, Net and multimediality. If we carefully observe the textual schemes of the latest generation manuals, it is not difficult to perceive that, in addition to making use of a more versatile and erratic reader – analogue in part, at least in intention and in some forms, to the surfer of the new means, their structure is a juxtaposition of texts and images, of an architectures which is not well structured hierarchically, which permits diverse processes, routes and readings, an arrangement which is very different from the organisation of information offered by the books of the traditional, and even the modern school. This was more rigid and dogmatic and therefore more formally programmed.

Certain norms are definitely changing in the underlying rhetoric of these texts, in the relations which are established between the writing and the implicit action in its communicative pragmatics, in the modes of interaction between the word and the iconography, and in the implications between the base of the text and other external texts to which it refers; in short, between the logistics of the author and the behaviour of the implicit reader. Some of those changes suggested here surely come from the innovations of the active book, and belong therefore to a certain tradition, but others may be interpreted as transfers or syncretic imitations – metamorphosis, perhaps – which the latest manualistics makes of the communicative patterns created by the online structures and languages.

The blocks in which the pages of these books are articulated and not *lexias* joined by electronic links, but do invite nomadic behaviour and even adopt

⁵ Z. Baumann, *Modernidad líquida (Liquid Modernity)*, México, FCE, 2002.

the forms of a rhizome, as in the semiology described some years ago by Gilles Deleuze⁶. If this were so, the new didactic textuality would be constituted, to survive the competition with the new media, in response to the criticisms of the old prints and the dogmatic cognitive forms, and perhaps even in a metaphor of the democratising eclectic constructivism of culture. The linearity of traditional pragmatics disappears and even the labyrinth makes a subtle appearance to encourage personalised construction, narrative therefore, of knowledge, of the curriculum and of the textuality itself. This narration also leads to an interactive, intersubjective, agreed to or analogical hermeneutics of the contents transmitted and of the languages in which they are expressed. This is the path which is most compatible with the resulting intertextuality and with the intermodal forms of communication. Behind these syncretic adaptive responses, the manual is renewed but also survives once more and pedagogical invariant in the cultural material of teaching. The modernised manual lives on therefore in school practice and it still proliferates resistantly, but the digital revolution – which has no more than started – proposes new textualities without doubt. How do text and net coexist, cohabit and interact?

Whether we like it or not, as Michael Appel wrote some years ago in *Maestros y textos (Teachers and texts)*, two thirds of what teachers and pupils do inside today's classrooms has to do with books⁷. This has certainly changed today but it is still true that the manual currently persists in schools as essential pedagogical mediation. In another context, Umberto Eco, referring to calls to join the empire of the Net, reconfirmed the value of the schoolbook as *princeps* tool in the transmission of knowledge, i.e., as pedagogical mediation in the knowledge society («What would be done in class today if there were a power cut?» asks the well-known semiologist of Bologna)⁸. Is it possible to imagine *a day without words in black and white* in the school of today?

Doubtlessly it is true that the new knowledge and multimedia society arouses an apparent dialectic of substitutions and a new game between apologists and critics of the new media, as well as the production of certain intermodal forms of communication which affect classical pedagogical mediation and which open the door for other textual modalities which are often syncretic in nature. Hypertext, on being manipulated, does not manage to free itself from the geometric episteme which introduces a certain order in the apparent contingency, which implies modes of reading transferred from the ascribed cognitive logic to the *habitus* of the users educated in the management of formalised textualities. It is evident, therefore, as Pierre Lévy warned, that modes of writing are not seen today as one substituting another but rather as one superimposed over another.

⁶ G. Deleuze, *Diferencia y repetición*, Madrid, Júcar, 1988.

⁷ M.W. Appel, *Maestros y textos (Teachers and Texts)*, Barcelona, Paidós, 1989.

⁸ U. Eco, *El libro de texto como maestro*, «El Mundo del siglo XXI», Madrid, 14.08.2004, p. 4.

The succession of orality, literacy and hypertext would not respond, therefore, to a dynamic of substitution, but to a process of syncretic complexification of linguisticity, which may even involve the return of some forms of orality. This conclusion, which would even have an ontological effect in those hermeneutic circles which associate memory and language, has important historic-cultural and pedagogical implications.

As Roger Chartier has indicated, revolutions of written culture have never produced substitutions or radical changes⁹. The manuscript survived in the period of printed typography, and the printed book coexists today with hypertext on the screen. Even more, contemporary writings, as well as appropriating well-established traditions and producing syncretic modes of expression, often generate intertextual models which are not always innovating. Eco himself concluded in the work cited above that Internet is not destined to substitute books, as the most ingenuous and simplistic sociologists would seem to suppose, but rather that it may become a good complement and an incentive to read more. From this perspective, the textbook might continue to be the master or magister which selects information and orients the search for more information, a function which the fragmentary and chaotic nets of cyberspace cannot do by themselves. Furthermore, the practice of surfing the Net, as Martin E. Rosenberg has shown, always ends up adapting the non-linear and contingent structure of the texts to a certain architecture of succession, which turns out to be compatible with the classical rhetoric of the use of print¹⁰, which means that the new forms of communication would correlatively incorporate some characteristics of the textuality of the conventional manual. One way or another, the printed or digital schoolbook is still a text aimed at communication according to certain rules which are both structured and structuring.

The manual which survives in places open to the new writing may also teach pupils to discover, from other conventional sources or from Internet itself, what the teacher is forgetting to teach, and it may become the archive of the memory model of school knowledge, always necessary as a frame of reference. Internet, adds Umberto Eco, might, in this respect, substitute the dictionaries and encyclopaedias of knowledge, the materials which weigh most in the child's schoolbag, but not guide the necessary cultural selection which puts minds in order and organises cognitive structures.

Notwithstanding the above, it seems clear that the traditional and modern characteristics of the didactic text have transformed into the telematic media and settings on which the current digital revolution is sustained. Not only have these changes modified the bases and languages of writing, but also the very

⁹ R. Chartier, *Las revoluciones de la cultura escrita*, Barcelona, Gedisa, 2000, p. 137.

¹⁰ M.E. Rosenberg, *Contingency, liberation and seduction of geometry: hypertext as an avant-garde medium*, Open Forum 2004 («El relato digital»).

ecology of communication and the role played by the actors who take part in the production and reception of the messages. In the new ecosystems there are certainly set-ups and complicities which fuse in different language games (which are also syncretic), oral, written and multimedia forms of communicative pragmatics.

We see how Internet, its technologies and its very linguistics is affecting the new forms of construction of school culture and of text. Unlike the printed manual, the Internet is no longer the support of a sequential and hierarchical canonical curriculum, but rather the amorphous means in which an undetermined number of *lexias* circulate, a river whose banks take shape and change according to the flow of bits of information uploaded or downloaded to be used. The implicit reader has been defined by the metaphor of surfer who interacts with this chaotic material and who structures cultural order according to his/her specific requirements and, in addition, re-signifies (rewrites on reading, in the *derridian* sense) everything s/he reads and writes. The classical schoolbook does not have this degree of freedom, since the differentiation it makes between reader and author is merely strategic. In short, the didactic guide of the teacher is a directive text (or paratext) which controls the whole process. In contrast, hypertext frees the individual from the academic rules s/he was subjected to by the conventional text. According to Rifaterre, the new model returns, in a certain way, to the original meaning of all text insofar as it promotes the action of weaving (*textere*), and is configured by means of the links which generate intertextuality¹¹. In this sense, hypertext is even more text and, in some way, even more of a syncretic cultural product.

The curriculum transmitted by the Net is therefore open, without an author, although it does have a multiple reader who, on Reading, is able to produce continuous rewritings which may be seen as options of a virtual grammarology of difference. There is an anthropic discourse underlying these self-programs which encourages the narrative and hermeneutic construction of the curriculum. The disappearance of the author, or his/her visibility, otherwise presupposes the existence of a collective authorship. This logic is compatible, at a different level, with that of postmodernity, in which the text becomes independent of the author and it is the reader who constructs his/her own order and constructs new meanings from his/her questions and with the fragments found in the oriented searches or in the contingent and random meetings with unforeseen materials. Everything seems to be leading, therefore, to a new constructivism of complex and not always foreseeable epistemic and disciplinary consequences.

The above mutations apparently threaten to transform the curricular text into a chaos with infinite hypotaxis which lack at first a holistic cohesion. Under this pression, the hypertextual discourse cannot help being iconoclastic

¹¹ M. Rifaterre, *Intertextuality vs. Hypertextuality*, Open Forum «Teoría del hipertexto», 2004.

in comparison to the rigid order of the conventional curriculum and may be seen to be heading towards the dynamic of texts exhibited in the form of a labyrinth, among which, as Silvio Gaggi indicates, the reader may feel that s/he has lost his/her way (lost in hyperspace¹². In this new mediation, as in nomadic, erratic or oriented circulation, through the labyrinths of information, each performance is a kind of original production or intuition of a revelation which is never reached, as occurs with aesthetic creation, almost always the result of improbable associations. Faced with a blank page, the labyrinth is surely the first creation of children's art which, as Jacques Attali incisively points out, is later imitated by the architect, the urban designer, the painter, the choreographer or the webpage designer¹³.

The method and the process of digital literacy and the forms of surfing online have doubtlessly changed the way the curriculum is produced and the methods used for staging it. The old printed text fixed knowledge when it was read, learnt or reproduced in imitation. With hypertext, the beginning, the end and the process are not predetermined. The genre of the active book already invented a more mobile subject and a more dynamic relation between text and reader. But the new interface imposes other behaviours and other methods which are radically different and even includes the readers, assimilating them within its own medium as content and even avoiding their condition of subjects.

On entering online communication, the relationship of the readers to the texts attains degrees of versatility which generate cognitive changes, not yet well-known but certainly important, whether it be on a personal level or, even better, at the level offered by the virtual communities, and it is leading towards new systematic and ecological syntheses. Furthermore, the new writing revolution will affect not only the didactic mediations but also the whole ecology of the classrooms, and that will generate a transformation in the methods, even though the book may survive, as the commentaries of Umberto Eco suggest.

4. *The schoolbook and school culture*

In recent decades the school book has become, under the influence of ethnographic and hermeneutic orientations of the new cultural history, an essential source for ascertaining the grammar of the school¹⁴. The manual is now seen as one of the most visible synthesisers of the empirical school culture.

¹² S. Gaggi, *From text to hypertext. Decentering the subject in fiction*, Philadelphia University Press, 1997.

¹³ J. Attali, *Chemins de sagesse. Traité du labyrinthe*, Paris, Fayard, 1996, p. 217, and G.P. Landow, *Teoría del hipertexto*, Barcelona, Paidós, 1997, p. 365.

¹⁴ A. Escolano, *Currículum editado y sociedad del conocimiento. Texto, multimedialidad y cultura de la escuela*, Valencia, Tirant lo Blanch, 2006.

In it we find the edited curriculum of each historical cycle. It is at the same time a mirror of the dominating values and stereotypes (*social imaginaire*) of the society which produced it and in which it circulates. Under its structures lie the method (*ratio*) of managing education, the rules (*habitus*) of the teaching profession and the behaviour of the subjects who construct worthwhile knowledge (*implied reader*). Are these not the grammar codes of that culture we are searching for?

In recent decades, school culture has become an essential object for the new historiography of education. Understood, as Dominique Julia defined it in the 1990s, as the set of norms which define the knowledge and behaviours transmitted by the school and the correlative series of practices that the educational institutions have constructed for the transmission of the disciplines and the inculcation of behaviours in the frame of the processes of sociability¹⁵, school culture will reveal the codes of the «silences» of the history of education of which Harold Silver spoke¹⁶, i.e., the keys of the «black box» of everyday life of the school¹⁷. This seems to be necessary for the knowledge of the rules implicit in the «grammar of schooling» to which Tyack and Cuban allude¹⁸.

With this in mind, the school manual as register of the whole school culture is an important and decisive source when dealing with this strategy of knowledge. The book may be examined as a representation of the practices which foresees and induces, as a base underlying which we find the pedagogical discourses regarding school activity and as an object indicating the values on which the ruling administration is based.

From the perspective of the *empirical culture* of the school, the manual is an object which is a carrier of indexical signs of a whole conceptualisation and pragmatics of education, that is to say, a culture. Its linguistic, semiological and iconographic analysis may bring us closer to the knowledge of the communicative codes which give identity to a particular pedagogy.

From the perspective of *theoretical culture*, the schoolbook is a discursive text bearing implicit conceptualisations which are subject to the traditions of meaning. In the discourse practices expressed, by means of the languages, rhetoric and communicative resources, we may read cultural values and criteria and didactic theories inspired by particular academic proposals.

With regard to *political culture*, a text is the legible exponent of the intentions of the actors who participated in its creation, of the normative framework which orients educational society and of the values which inform and regulate

¹⁵ D. Julia, *La culture scolaire comme objet historique*, in A. Nóvoa (ed.), *The Colonial Experience in Education*, «Paedagogica Historica», Supplementary Series, 1995, p. 356.

¹⁶ H. Silver, *Knowing and not knowing in the History of Education*, «History of Education», vol. 21, n. 1, 1992, pp. 97-108.

¹⁷ M. Depaepe, F. Simon, *Is there any place for the history of education in the History of Education?* «Paedagogica Historica», vol. XXX, n. 1, 1995, p. 10.

¹⁸ D. Tyack, L. Cuban, *En busca de la utopía*, México, FCE, 2000.

the relations between the members of an interpretative, i.e. hermeneutic, community.

In short, the schoolbook is a mediation with its own signs of identity due to its *textual geometry* and to the *cultural attributes* conferred on it by society. As a *holistic representation* of the whole *educational culture*, the manual – an object excluded until recently from our cultural heritage – it has now become an essential source for revealing certain keys of the «black box» of the grammar of the school as well as a common and universal text of cultural democracies.

Due to all the above considerations, the teaching manual has been and still is a kind of *school culture invariable*. At the beginning of last century, the so-called New School movement, which defined itself as an anti-book movement, and which was based on the affirmation of the principles of intuition and action against the long and sustained verbal tradition of teaching, ended up by integrating these postulates in a new didactic paradigm which also assimilated the textual supports, albeit in a renewed form. On one hand, this innovating current invented new compositions of books responding to the genre of the active book, a model which implied a new reader subject and which transformed the principles of learner-centred teaching and an empirical and intuitive methodology into the printed support. On the other hand, activism introduced modifications in the manuals then in circulation in school practice. The lessons of things, the centres of interest, the concentrations and projects, to name but a few of the best-known models of that period are a good example of the processes of assimilation-appropriation-transformation made by the texts of the theoretical and practical suppositions of a change of pedagogical paradigm like that which the renewed school introduced.

In the study on this issue which was presented at the 2004 ISCHE Congress¹⁹, we showed how the internal grammar of the school, the codes of the empirical culture of education, the self-same *habitus* of the profession of teacher, and even the practices prevailing among the authors of didactic texts and within the publishing sector, conditioned the transfer of the principles of the New Education to the real world, at the same time as the proposals of renovation also modified the manualistics tradition in force until then. In these processes of historical change, a certain negotiation, not always clearly stated, will produce eclectic results which will allow the text to survive as a didactic invariable as well as its underlying culture and, at the same time, the renovation of archaic pedagogical practices with the incorporation, under certain suppositions, of the innovations arising in the vanguard of education.

Because of its prolonged and universal existence, in different forms, in the educational institutions throughout history and in all cultures; because of the resistance it shows to its disappearance from the practices prevailing in the

¹⁹ A. Escolano, *La recepción de los modelos de la Escuela Nueva en la manualística escolar española de comienzos del siglo XX*, «Historia de la Educación», n. 25, 2006, pp. 317-340.

life of teaching establishments and even because of the successive and verified accommodations it has made to the mediatic and communicative changes operating outside the school, the book has become a representative medium, both real and symbolic, of the modes of conceiving and performing formal education. At present, the manual, without losing its textual identity, is adapting as we have seen to the changes taking place in supports and languages under the impact of the digital revolution.

All didactic text, like a micro-world, is firstly a *curricular support*, that is to say, a form of materialization of the so-called *published curriculum*, which is certainly not the whole school programme, but rather the printed version of the vulgate into which is translated the normative curriculum and the proposal of knowledge and actions which usually orient teaching practice in a great number of schools and in a good part of the ethnographically observable behaviours among the teachers.

A manual is, at the same time a *mirror of the society* which produces it, insofar as its contents, language and iconography reflect the values, stereotypes and ideologies which define the established mentality such as it is interpreted by its authors and the filter of the book police who approve it, i.e., of the circles and actors which produce and legitimize it. It even reflects, we might add, the expectations of its users, to the extent that these readers are also implicit as long as they have been taken into account when the texts are being written. Texts and images are, in this respect, a true representation of the sociability codes in force in each time and place, epitomized in *clichés* which can be easily memorized, as would suit the traditional forms of teaching based on the imitation and reproduction of models.

Finally, the schoolbook is a *ratio*, the *libretto* that guides the development of school activity, an essential part of the *method* which lays down a pattern for a good part of the process of teaching and study. The book is, therefore, a representation of the modes of didactic communication and of the pedagogical strategies that indicate the norms of government of the classrooms. Without a score neither the representation of the action nor the action itself are possible. In this sense, a text may be an element, which regulates what used to be called the «progress of the class», and is now called, in the technocratic language of the present, «curriculum management». At the beginning of the 19th Century, the manual in Spain belonged to the school or the teacher. It was not normal for a pupil to have a text which conferred authority and competence to the teacher. Later, as simultaneous teaching spread and, therefore, the *mise en scène* of the class was transformed, the score moved into the hands of the pupils. In simultaneous, collective or divided teaching, the text was essential to ensure the same choreography or scenography of the school, i.e., to harmonise the work climate of the classrooms.

The book still conserves today the attributes which gave it identity. Its format and the implicit target reader adopt patterns inspired by digital models, which

it combines syncretically with the classical ones, but it maintains structural norms. The design has been modernised of the *mise en scène* of its models, the illustration strategies – influenced by the language of multimedia, the *modus typographicus* of the writing and other elements of its composition, but it conserves the logic of printed culture. Otherwise, the book is still the axis of numerous relations – as Borges expressed it more than fifty years ago, and no just a verbalised structure.

To sum up, all text, both classical and digital in whatever outward appearance, in whatever support, is what its readers make of it in practice. No text exists outside its given appearance, but neither does it exist without the processes of approval by the subjects when they interact with the forms and contents of the graphic culture in which it is manifested. These appropriations, which are readings, or if required, rewritings, are what determine the construction and co-authorship of the text.

5. *Manualistics as intellectual field*

In little more than a decade, the schoolbook has become an essential resource in order to understand the codes which define the world of education in its practical, discursive and socio-political dimensions, as well as an object of generalised interest to ascertain and understand the modes of cultural sociability that that it has given shape to in the past, just as, in the present, it is structuring individual and collective mentalities in the so-called literate communities.

Not only the science and pragmatics of education, but also historiography after its shift in recent years towards ethnographic and hermeneutic approaches which are fundamentally oriented to the decoding of the keys of memory implicit in the so-called object-prints of the culture of education – of which the manual is without doubt one of the most universal, has revalued these old tools of the traditional and the modern school which were not long ago destined for destruction or oblivion. This brings about a certain reification of the historical archive of education that includes texts as sources of knowledge.

In consequence, the convergence of expectations between theoreticians, historians and teachers has given rise to a new intellectual field in the world of educational research, which we have called *manualistics*. Born some years ago but already consolidated, it covers the set of discursive developments, genealogical analysis and empirical observations that have taken shape around the schoolbook as an object of knowledge. This domain has already produced in the last ten years a wide and diverse range of studies; it has led to the appearance of stable research groups in the universities and museological and documentary networks focused on the material memory sustaining the field's

tradition and the web of scientific relationships which act as academic support to the new cultural field of manualistics (*Manes Project*).

This line of research also affects the conceptualisation of the manual as a specific textual construct which, despite the metamorphosis writings undergo when they are digitalised from other formats and structures, have their own specific and structuring production norms, i.e., they have identity traits.

Manualistics has emerged as a domain of educational research in parallel with the media changes generated around the digital revolution we have been discussing and is focused mainly on the reconstruction of the memory of the book, i.e., on research into the material and formal attributes of the manual as text and as historical production.

This is one more indicator of the complexity that characterises this new area of study to which John Issitt refers²⁰. We may even ask “why not?” if the affirmation of this new intellectual field, as well as being connected to the ethno-historical currents which predominate today among studies into the school culture, is not at the same time a call for attention, perhaps not without certain bad academic habits, about the risks that may be faced by the pedagogical invariant which constitutes the textual tradition. It may even be an attempt of survival and legitimisation of the codex against the technologies that threaten to take its place.

Why should we value this old material element of the ergological equipment of pupils and teachers, the heavy and onerous texts the young carried on their backs and in their minds and which they often attack with scribbles, doodles, graffiti and other forms of symbolic violence? Why, as Walter Benjamin in 1924, should we return to the models of those archaic text-objects of childhood?²¹ Until not long ago the school manuals, and other materials used in education had been ascribed to the world of objects excluded from cultural goods by the idealist and positivist episteme who, in the past, represented the human sciences and who expressed him/herself in diverse forms of super-structural or functionalist discourses. These modes of intellectual construction actually broke with memory and looked down on all the evidence of material culture, which they considered as nothing more than archaeological remains which were interesting, perhaps, for curious collectors of fetishes, but absolutely trivial regarding their power to explain past or present reality. In this context, only a genealogy of suspicion could glimpse the symbolic-representative and empiric-practical value of such innocent tools in the explanation of the origin and the conditions of certain cultural practices and the semantics of the system that such media are suggested to exhibit or to hide. Thus began the revaluation of these resources which had been excluded from the culturally accepted archive. The

²⁰ J. Issitt, *Reflections on the study of textbooks*, «History of Education», vol. 33, n. 6, 2004, pp. 683-696.

²¹ W. Benjamin, *Escritos*, Buenos Aires, Nueva Visión, 1989, p. 66.

so-called national libraries have not given room to these resources because the academic memory they care for was only a register of the noteworthy. Minor literature, and even more so, that of the school which is the expression of a moral and didactic narrative and was always undervalued by its creators, had to seek shelter elsewhere if they were not lost in some marginal space or simply consigned to destruction and oblivion.

However, the ethnographic reconstruction of these and other signs of educational culture, which is today a reflection of the wider interest in the recuperation of the historical memory, provides one of the essentials for any foundational hermeneutics of a cultural democracy. For just this reason, manualistics boasts such legitimate social credentials. The construction of this new archive breaks the present rules of the game and creates new strong and influential relations, more democratic and plural in nature, in the topology of the intellectual field configured in the research practice of the new cultural history.

Constructing a field is also to define in part a new text and new interactions or moves between the actors intervening in school culture and its interpretation. As well as making the new cultural markers visible, it also implies demystifying the previous archive, encouraging its decoding, confronting it with other sources of knowledge and wisdom. The deconstruction that this critical epistemology invites us to perform is a type of strategic operation which introduces a propaedeutic and instrumental disorder in order to reveal the codes implicit in the culture of the excluded material, which are supposedly those which operate in the real behaviour of the subjects and in the implicit structures of the institutions.

Following what has been set out above, the new disciplinary field of manualistics must be constructed according to the genealogical contributions of the discourses and experiences related to pedagogical mediations, and also to the research relative to the pragmatics of education, including all the theoretical, semiological, anthropologic-cultural and didactic perspectives

The configuration of this area has been fundamentally dominated among us until now by the logic of historiography, which may be explained in part by the field having been gestated in an academic context influenced by the micro- and ethno-historical shift adopted recently by the genetic reconstructionism of sociocultural practices – which do not affect only the world of education, but rather most of the spheres of culture. However, this original historicisation of the topic is already being transcended, in such a way that the intellectual field of manualistics is being opened to all the disciplines concerned with the discursive and factual dimensions of school culture and with those which analyse the contexts in which books are written and in which they circulate. It neither should be forgotten that the school manual is surely the most universal text in literate societies, and therefore one of the basic instruments of the cultural sociability of all individuals and groups. From this it is also inferred that

the field of manualistics is constitutes as a focus of interest which affects all human and social sciences – not just those of education – which have to do with the comprehension and interpretation of the means of production, cultural normalisation and of the pedagogical and political control apparatus which cultures create to ensure their governability. If this is so, the intellectual field of manualistics involves extensive and general interests, not just corporative ones.

Accepting all this, the world of the manual and its environment as a subject of research can only be examined, as John Issett suggests in the previously cited study, from the perspective of complexity. Since the beginning of the 1990s, the schoolbook has been analysed kaleidoscopically, to use a metaphor suggested by Borre Johnsen in a study of this complexity²². This has changed the status of the manual from being a simplistic element of school equipment to being an object to be searched for, taken care of and, catalogued and studied from the most diverse perspectives. The range of manualistics as a disciplinary field under construction has changed to the same extent.

Research practices have ranged from the collector's obsession, the inventory in data files and information networks to the application of analytic filters to explore images, value orientations, curricular syllabi, readers, textual genres, linguistic schemes, iconographies, methods... All these practices have generated an intellectual field which is still not closed with regard to categories, but is ever more delimited academically. Discourses and forces of very diverse nature and projection converge within it. This field is evidently, as all intellectual fields, a cultural construction which, through specific means of organisation, gives rise to a definite sphere of rationality and to a repertory of concepts and principles. From this perspective, which has a gnoseological substratum, the field of manualistics did not arise because of the discovery of an object or a datum which was supposedly pre-existent in the text, but rather from the continuous interaction of all the research practices mentioned, created by the researchers themselves from their academic traditions and from the transferences produced by imitation of and interaction with other similar fields. These heuristic practices are also ethnographically observable and analysable as the empirical behaviour of researchers, the topics they study and the sources and methods they use. In the observation of these empirical studies and in the reflection on them and their results we find the bases closing the categories of the field.

That manualistics is today a field under construction means, among other things, that we are faced with a very open domain in which the introduction of new topics and approaches (such as, for example, those derived from the digital revolution we have commented on) may break the rules of the intellectual game²³. Textualities in the Internet, in this case, may change the perceptive

²² B. Johnsen, *Libros de texto en el caleidoscopio. Estudio crítico de la literatura y la investigación sobre los textos escolares*, Barcelona, Pomares, 1996.

²³ A. Escolano, *La manualística en España: dos décadas de investigación, 1992-2011*, in J.

schemes, the orientations of meaning and the consensus of signification, the internal and external relations between actors, the methodological mechanisms and even the whole ecology of the pedagogical system. This will mean a reconceptualisation of the established field and also a new formatting of the intellectual and operative territory in which we work and interact. The theory of the field, in its most dynamic conception, may manage to assimilate the previous instability as well as the re-signifying practices implied by the deconstructionist or constructivist discursive shifts derived from said strategies. This is, in short, the greatest intellectual guarantee for a cultural model open to all kinds of development which will contribute to defining the identity of the school text.

English public schools and the moulding of the 'Englishman'

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ABSTRACT: The paper looks at the English public school system before and during the days of the British Empire. It provides an overview of their history and how they became a feature of the collective imagination. For a long time exclusive and – despite their name – strictly private, public schools were the traditional training ground of the British élite. They were acknowledged as producing generations of English 'gentlemen' bound by a precise behavioural code – a code that, at the pinnacle of their fame during the second half of the 19th century was, however, learned, not inherited, and by that token, accessible to the emerging middle class. The young men issuing from England's public schools were seen as embodying quintessential English traits: team spirit, acknowledgement of the responsibilities and duties that come with privilege, playing by the rules, good manners, ability to command but also readiness to serve and sacrifice their lives in distant lands – all fundamental qualities for a nation with an expanding empire. The reasons behind the enormous social and educational success enjoyed by public schools will be analysed, especially following the reforms introduced by illuminated headmasters like Thomas Arnold whose revamped curriculum was underpinned by a new educational philosophy. As well as tracing the history of these institutions as they changed down the years, the paper also examines the unique literary genre – the school story – that arose during the heyday of public schools. An exclusively British phenomenon, the school story was read in all strata of society, disseminating a romanticised version of public school traditions, ethos and outlandish behaviour that became a major feature of the collective imagination. Also, in the years straddling the 19th and 20th centuries – when public school pupils, the new heroes of a very widespread children's literature, were groomed to become worthy officers of the Empire – the public school educational model was adopted by all other schools in England.

EET/TEE KEYWORDS: public schools, gentlemen, imperialism, athleticism, children's literature.

Introduction

In their heyday – from the 1830s up to the Second World War – the public school was probably the educational institution held in highest regard in England, by establishment and general population alike. Romanticised by a flood of ‘school stories’, so numerous as to form a literary genre from the 1860s onwards, the English public school system became indelibly stamped on the collective imagination of a people and a country. In no other place or time has a school, or rather a type of school, been attributed such social, political and cultural importance. For about a century, from Victorian and Edwardian times up to and after The First World War, the archetypal ‘English’ character was explicitly seen as the result of a public school education. Even if this ‘typically English’ character underwent subtle but fundamental changes over this period, the new take on what constituted the typical Englishman – for both those who forged it and those who embodied it – was nonetheless seconded by, or thought to be the result of the public school system. During the 19th and early 20th centuries public schools overhauled their organisation and curricula to keep abreast of rapid social change. The essay looks at this transformation, examining their extraordinary and unparalleled success through the prism of children’s literature, a perspective able to provide many insights, since books for children have always been intricately intertwined with the history of education.

1. British public schools: the beginnings and the arrival of Thomas Arnold

The first public schools were established in the 15th and 16th centuries. They were called ‘public’ because, unlike other British education institutions of the time, linked each to a specific geographical context and, even more, to a specific circle of clients (i.e. parents), they were intended for ‘everyone’. National rather than local in scope, they determined to be free of any narrow or overly specific scholastic or educational imposition by their pupils’ relatives. Located for the most part in the countryside far from urban centres and hence distanced from outside interference, public schools lived in ‘splendid isolation’. Their history was chequered. There were highs and lows and even moments of grave crisis, either due to a dearth of students or on account of outright rebellion by pupils, forever in conflict with their teachers.

The oldest schools were few but also wholly unique. Each had its own rules and traditions. There was no corporative sense, much less any idea of together forming a specific, coherent educational system. Until, that is, the arrival on the scene in the 1830s of Thomas Arnold. Headmaster of one of these institutions (Rugby), Arnold would set in motion a thorough reform of the whole system. Only after Arnold did the public school come to stand for a concept that went well

beyond the single institution, an integral component of English social mythology, an emotional rather than rational construct of what being English was all about. After Arnold, public schools became the emblem of a whole system that reached beyond education to embrace political and social fields. They summed up a series of well-defined behavioural patterns and social values instilled in an increasing number of young English males, who embraced them and took them out into the wider world, forever marked by their school years. So much so that as late as 1940 George Orwell would say that the poet John Cornford, «the young communist who died heroically in the International Brigade was public school to the core»¹, and even later, Robin Maugham, grandson of the more famous Somerset, would write in his novel *The Link* that «Eton is a way of living»². Not a member of the aristocracy himself, Thomas Arnold epitomised the reforming zeal of the new middle class. Coming onto the scene thanks to the economic wealth generated by the industrial revolution, this new, socially ambitious class had led the evangelical revival of the early 19th century, with the result that its members felt they were the new arbiters of taste and moral values, as they in fact were. The 1820s and '30s had seen the rise of a new establishment comprising middle class religious intellectuals who had risen to occupy eminent positions by dint of hard work coupled with an extraordinary sense of duty and responsibility, underpinned by a resolute drive to change the world. It was with just this zeal and spirit that Arnold entered the public debate at a very young age, publishing idealistic organicist tracts calling for the 'Christianization' of politics and criticising the separation of spiritual and secular matters. For Arnold, State and Church were not separate entities but virtually synonymous since they both aimed to put into practice Christian principles – in the ethical rather than doctrinal sense and eschewing all sectarianism. The purpose of all human behaviour, whether in the public or private sphere, was to do good – and good could only be achieved by improving oneself and the world through study. Study was man's key to understanding the superior goals incumbent on him, the means to reach beyond his own selfish, shallow nature. From this standpoint, governing and educating were allied disciplines. Both aimed to guide people to the right path and set aside personal interest in pursuit of higher aims³. The headship of Rugby was providential for Arnold. It gave him an opportunity to create a microcosm that would serve as an example of what the State could and should be. There was no better place in which to construct a microcosm than a public school. As boarding schools, they were closed environments, isolated from the surrounding world where boys would live for years without ever returning home, meeting practically no one other than their teachers and schoolmates. As

¹ S. Orwell, I. Angus, *The Collected Essays, Journalism and Letters of George Orwell*, London, Penguin, 1976, p. 540.

² R. Maugham, *The Link*, London, Heinemann, 1969, p. 56.

³ T. Arnold, *Miscellaneous Works*, London, B. Fellowes, 1845; T.W. Bamford, *Thomas Arnold*, London, Cresset Press, 1960.

a community, it was the ideal 'laboratory' in which to put to the test the complex weave of relationships, hierarchies, duties, rights, responsibilities and rituals also found in the wider society.

Arnold became head of Rugby asserting and obtaining his independence over school governors, however eminent. He demanded the highest professional and cultural standards from his teaching staff, in exchange elevating the position and status of teachers as never before. As well as higher pay, schoolmasters now commanded greater respect and enjoyed the privilege of enhanced status. More especially, Arnold transformed the school system, adopting a model that would soon be implemented by all public schools. He turned Rugby into anything but an exclusive school for the privileged, much less one reserved for the aristocracy. Indeed he discouraged aristocrats, but also very rich merchants, from sending their sons to his school, for the more powerful and influential were the parents, the more these would claim to have a say in how their sons were educated, an area that in Arnold's eyes was the exclusive province of the Headmaster. Arnold was adamant that religion could in no way be separated from education. This conviction led him to coin the motto 'Godliness and Good Learning' that summed up the essence of the public school for a whole generation of early Victorians. Godly behaviour and good education were inseparable since they both strove towards truth as a way of living in harmony with oneself. For Arnold, schools should never just be places of learning. Their aim was to provide a system of education that sought moral perfection. Moral perfection, however, was more readily obtained through wide knowledge, since it was knowledge that gave men a full understanding of their task in life. There was in fact no more appropriate vocation than teaching for a man of the church since no other occupation was so implicitly pastoral as talking to a classroom full of pupils. Arnold's ideals were not particularly new. The Church had dominated education since time immemorial in England; teachers were ordained when they started their training and there were no secular teachers in the true sense until the 1890s⁴. Yet although well rooted in society, these ideas took on new life in the early 19th century when the evangelical revival launched an urgent appeal for educational reform. Frequented by the sons of the aristocracy, public schools had gained a terrible reputation. They were accused of having gradually become 'dens of vice', places of widespread immorality, abuse, sadistic corporal punishment and hazing, overseen by poor teachers using antiquated curricula. On a broader scale, society at large had been profoundly marked by the advent of rampant materialism in the wake of the enormous technological developments at the end of the 18th century. A

⁴ E. Keith, *The Development and Structure of the English School System*, London, Hodder and Stoughton, 1985; E. Midwinter, *Schools in Society. The Evolution of English Education*, London, Batsford Academic, 1980; C. Norwood, *The English Tradition of Education*, London, John Murray, 1929.

new pragmatic, utilitarian approach had invaded all fields including education, with the result that both religion and learning were given short shrift. By the second half of the 18th century, the promoters of educational reform were advocating greater emphasis on subjects like science and the applied arts. 'Useful knowledge' was what was needed. Pamphlets and tracts addressed to adults and children proclaimed man's achievements, asserting that human progress could only be achieved by turning man into a mechanic or an engineer⁵. This was the antithesis of Arnold's ethical and spiritual ideal of human progress, and the educational system required to achieve it. For Arnold, if men were to promote morality and do good – as was their duty – reform was indeed needed, but it was not a revolution that discarded tradition. What was needed was a solid grounding in the classics – taught by liberal-minded men able to make the liaison between antiquity and modern-day issues – underpinned by sound religious principles. Children needed to be instilled with a profound passion for philosophy, history and the present-day world with all its social, cultural and political concerns – questions that were much better understood, said Arnold, if examined through the prism of the ancients. The bedrock remained, however, a sense of 'purposefulness', a profound awareness of the implications of one's actions both while at school and once in the wider world.

2. *Building a sense of responsibility*

Early 19th century religious intellectuals were adamant that the progress brought by the industrial revolution that had placed England at the forefront of all countries be channelled in the right direction and never divorced from Christian principles. For men like Arnold, the stronger and more powerful a nation became, the greater the sense of responsibility required of its people.

The middle classes of the time had long been the promoters of moral reform. They had long advocated in vain for an intellectually respectable, morally staunch education system that would especially elevate their sons and admit them to the corridors of power. Public school reform based on Thomas Arnold's principles was completely in tune with their ideals and ambitions. So when he and his followers took over their management, public schools appeared the perfect recipe to allow the middle class to mix with the upper echelons of English society, in an environment moulded by the typically middle-class religious and moral tenets now being acclaimed by society at large. In this sense public schools helped defuse widespread discontent among the new rich on account of their general social marginalisation. Now the sons of middle and

⁵ See Norwood, *The English Tradition of Education*, cit.; L. Stone, *Schooling and Society: Studies in the History of Education*, Baltimore, Johns Hopkins University Press, 1976.

middle upper class families were able to mix with the scions of the aristocracy in the new public schools. They were all, without distinction, turned into gentleman, imbued with a common code of values, convictions and behaviour that would serve them in their adult life – one that would doubtless entail high office. Chesterton, a famous public school headmaster of the generation subsequent to Arnold, clearly suggests that public schools were not a barrier to social advancement but, on the contrary, opened doors. «Public schools are not for the children of gentlemen; they are for the fathers of gentlemen», he noted. Similarly, the founder of Radley, a new public school, said in 1872: «One of the many uses of our public school is to confer an aristocracy on boys who did not inherit it»⁶. For both writers ‘gentlemen’ and ‘aristocracy’ were synonyms for a set of superior character traits that could be acquired through education. Now, belonging to an educated elite – with a good grounding in the classics, but above all an unwavering ethical code, unfailing sense of duty and desire to work for the betterment of the world (with all the ambiguities that this concept might entail) – replaced noble birth as a passport to being part of the ruling class. As a result, the public school system expanded enormously without interruption from the 1840s to 1900. The original handful of public schools, which remained the oldest and most prestigious, became a cluster. In 1864 a special body, the Clarendon Commission, was set up to each year decree which schools were worthy of being part of the system. Initially there were nine schools, the famous ‘Clarendon Nine’: Eton, Winchester, Westminster, Harrow, Rugby, Charterhouse, Shrewsbury, and later, St Paul’s and Merchant Taylors. The list gradually became longer. In 1869 a Headmasters Conference was established as an annual event to compare methods, curricula and organisational issues. As a result, public schools developed a common front, becoming stronger and more effective for it. They became, perhaps to a certain extent unwittingly, part of a strategy to isolate and set apart members of society earmarked to become gentlemen, and by the same token protect that behavioural code from outside influence. Yet within the restricted confines of this closed elitist system, and despite their many contradictions, Arnold’s reformed public schools did have a democratic influence. Implicitly, the code of conduct and value-set they promoted was not inherited but acquired, and so accessible potentially to all. In consequence, public schools brought together members of the upper and professional classes, something that would otherwise have been very unlikely in England’s rigid 19th century class system.

Arnold and his immediate successors inherited an inveterately degenerate system. Public schools had become enclaves under themselves, governed by pupils in open, and often violent, conflict with their outdated teachers. All sense of direction had been lost. Arnold and his group turned them into respectable,

⁶ I. Quigly, *The Heirs of Tom Brown. The English School Story*, London, Chatto and Windus, 1982, p. 8.

upstanding institutions. They achieved this especially by ensuring that the school acquired increasing control over the lives of their students. Control extended beyond the classroom and school hours to encompass all pupils' free time. For Arnold, and his predecessors, a boy's free time was fundamental since it was when left to his own devices that a boy would have to assert a spontaneous, independent capacity for doing good. One of the oldest and most typical features of public schools since their creation, and profoundly respected down the centuries, had been that pupils should be free to govern themselves outside the classroom. Discipline might well be severe in the classroom, with whipping and caning, but outside the classroom pupils should lead their lives according to their own laws and criteria. This excessive freedom had, however, often led to episodes of unacceptable cruelty, tyrannical behaviour, injustice, bullying and hazing. Sustained by his ideal of making Rugby an example of the perfect Christian state in miniature, Arnold had to find a solution. It had to be a solution that did not entail the direct interference of teachers or the headmaster in matters of pupil discipline and the organisation of everyday life in a boarding school divided into Houses, with community areas for socialisation. At the same time it had to prevent gross injustice and violence, especially against the younger and weaker members of the community. The solution Arnold found was crucial and would change the face of public schools: the Prefect system. Prefects were chosen from among the older students, usually in the Sixth Form – an optional further one or two years following regular schooling for boys picked for their academic achievements and character – taught by Arnold himself. Prefects were his lieutenants, the means through which he set and maintained the moral tone of the school. Expected to lead by example when dealing with disciplinary matters, they enjoyed considerable power and privileges and the headmaster's complete trust. In exchange they had to follow him loyally and prove able to settle all issues arising among the boys in exemplary fashion. It was through the Prefects – still 'young boys' yet imbued with Arnold's principles – that the headmaster's influence percolated throughout the school without it seeming an imposition. The Prefect system ensured greater control over the lives of all boys at school but at the same time avoided direct intrusion by the authorities. The system would be adopted by Arnold's successors as a fundamental element of the new reformed public school. Edward White Benson, headmaster of the new Wellington College, and George Cotton at Marlborough, both of them former Arnold pupils, clashed seriously with parents and school governors demanding strict teaching staff supervision of pupils outside the classroom. Benson and Cotton threatened to leave if the Prefect system was substituted by a more direct interference. Either the Prefect system stood, they argued, or to all intents and purposes they had become headmasters of an establishment that could not consider itself a public school⁷.

⁷ A.G. Bradley, A.C. Champneys, J.W. Baines, *A History of Marlborough College*, Whitefish,

Middle, middle-upper, and upper-class parents swiftly set aside their doubts and fully backed the new batch of headmasters in the mould of Thomas Arnold, sending an ever-increasing number of their sons to public schools. An example is Harrow, which under the leadership of C. J. Vaughan, another Arnold disciple, increased enrolment from 69 in 1844 to 466 in 1859⁸.

Thanks to an article Arnold wrote for the *Quarterly Journal of Education* in 1834, we have a record of the subjects taught at Rugby and their distribution on the timetable. Weekly lessons were broken down as follows: on Monday, Wednesday and Friday there were two lessons in the morning, from 7 a.m. to 8 a.m. and from 9:15 a.m. to 11 a.m. These were followed by two afternoon lessons from 2:15 p.m. to 5 p.m. On Tuesdays and Thursdays, morning lessons also included two hours of composition from 11 a.m. to 1 p.m. Tuesdays, Thursdays and Saturdays were half-days, with the afternoons free. There were also lessons on Saturday morning with the exception of the composition class. In total there were some 20 lessons a week of one or two hours each. Two of these lessons were dedicated to mathematics, and 2 to modern foreign languages. The rest were taken up by classical literature, reading of the Holy Gospel and history. Much of the history focus was on the ancients, especially Tacitus, Livy, Herodotus and Thucydides. Even the study of the Holy Scriptures was in part a linguistic exercise. It was standard for The New Testament to be in Greek⁹. Arnold was fully aware of the 'classics' bias he imparted to the school curriculum. He could conceive of nothing else. Yet although he strenuously defended the practice of making the classics the basis of his education system, Arnold never lost an opportunity to underline that a classics teacher should be profoundly versed in modern literature and history just as much as he was in ancient Greece and Rome. The pure scholar, he would say, could not transmit to his pupils the major advantages of a classical education which was a capacity to better understand and appraise the current world, current thought and the language commonly used for writing and expressing thought. He drew a clear distinction between the laborious, useless exercise of mechanically translating the classics and the very worthwhile operation of translating them into stylistically appropriate English. «Herodotus should be rendered in the style and language of the chroniclers, Thucydides in that of Bacon or Hooker, while Demosthenes, Cicero and Caesar require a style completely modern»¹⁰. Benson, a former pupil of Arnold who became headmaster of Wellington, would hark back to his own experience and Arnold's example when preparing his own school curriculum. He expected his pupils to read serious, difficult texts, exhorting them constantly

Kessinger Publishing, 2010 (original edition: 1922).

⁸ T.W. Bamford, *Rise of the Public School. A Study of Boys' Public Boarding Schools in England and Wales from 1837 to the Present Day*, London, Nelson, 1967.

⁹ See D. Newsome, *Godliness and Good Learning: Four Studies on a Victorian Ideal*, London, John Murray, 1961.

¹⁰ *Ibid.*, p. 66.

to apply what they had read to the widest range of questions. His lessons on the *History of Civilisation in Europe* by Francois Guizot is a clear demonstration. A pupil of Benson, the future Reverend Walter Moyle, would later recall these lessons:

What we used to do was to prepare a certain amount one evening in the week and do it in class the first lesson next morning. In setting the lesson the Master would generally give us references to quite half-a-dozen other books – bearing on the passage to be prepared – and expected us to go to the school library and get these passages up. We read in this way, besides the Guizot, a good deal of the following books: Thierry's *Nouveaux Récits de l'Histoire Romaines*, *Etudes de Littérature*, by Villemain and also Duruy's *Histoire du Moyen Age*¹¹.

The wealth of autobiographical material written by former pupils about their public school days in the 1830s, 1840s and 1850s all corroborate this account and the fact that students were expected to engage in serious study, research and independent thought.

The school curriculum issued by Arnold for Rugby created a sensation in education circles of the time. Still in 1864, thirty years after Arnold's day, the Public School Commission would refer to Arnold and the Rugby curriculum as the guiding light for conservative-type schools. It was a curriculum in which mathematics was of little importance, French a mere option and the natural sciences completely neglected. It should be pointed out, however, that Arnold, and many other teachers of the day, constantly recommended nature study as the most rewarding occupation for a boy's free time. This exhortation was part and parcel of the ceaseless, single-minded pursuit of knowledge, a fundamental trait of Victorian intellectuals. In fact a truly striking, constantly recurring feature of the biographies and memoirs of men of that time is the fervent passion for observing nature so many had cultivated from childhood. It would appear that very many young boys passed much of their free time out of the classroom going on walks from which they would bring back flowers, leaves, birds feathers, stones, beetles and other small creatures that would be catalogued and collected. A man like Charles Darwin, who would revolutionise the study of biology by accumulating and finally making sense of an infinite series of minute clues found in the natural world, could only have been born, or rather could only have grown up, in the England of those years¹².

¹¹ A. Benson, *Life of E. W. Benson*, London, Macmillan, 1900, p. 214.

¹² C. Darwin, *The Autobiography of Charles Darwin*, London, Collins, 1958 (original edition: 1887); C. Kingsley, *Charles Kingsley. His Letters and Memoirs of His Life*, Henry S. King and Co, 1877; J.H. Overton, E. Wordsworth, *Christopher Wordsworth, Bishop of Lincoln*, Rivingtons, 1890; A. Westcott, *Life and Letters of B.F. Westcott. By His Son Arthur Westcott*, London, Macmillan, 1903; L. Creighton, *The Life and Letters of Mandell Creighton*, Longmans, Green, 1904; Bonney, T.G., *Memoirs of a Long Life*, Cambridge, Bonney, 1921, etc.

The public school curricula of the early Victorian period and their insistence on educational out-of-class activities reveal the confidence on the part of teachers that boys could be made to work hard, tackle wide ranging and demanding reading assignments, be able to make independent judgements and conceive of their lives as always engaged in some sort of profitable activity – not of course, in the sense of vulgar economic gain but a gratuitous amateur pursuit as befitted a gentleman.

By the same token, the demands made on public-school staff were equally stiff. Arnold demanded complete dedication from all those in service. Teachers were warmly invited to live at Rugby rather than attend on a daily basis. But especially he demanded they be intellectually alert and active, keeping abreast of events through wide reading, social exchange and constant study. The teachers appointed during this period and up to the 1870s were certainly men of exceptional learning, often the best in their field, heading the rankings published by the universities. Salaries were high too, on a par and in some cases even exceeding what scholars would have received had they remained within the university as teachers and researchers¹³.

In Arnold's day and immediately after, every opportunity was taken, as we have seen, to fill – and *de facto* negate – any free or play time the boys might have, channelling them towards edifying and instructive activities. The boys learned the rudiments of worthwhile leisure activities such as sketching and drawing, reading music, critiquing and writing poetry. They were encouraged to keep a diary and build an anthology of their own or others' *bons mots*, observations and thoughts. Describing their discoveries, experiences and reflections in the writing of letters was encouraged as a means of developing communication skills. With so many opportunities and stimuli to fill their pupils' free time, the Victorian teachers of Arnold's day were little inclined to regiment either out-of-class activities or the boys, especially if that organisation had to come from above. In their view, if young people were to learn the value of free time, they had to be allowed sufficient freedom and time to pursue their own inclinations and interests.

All this was to change, however, between 1860-1870. Increasingly, as the 19th century drew to a close, boys of 9 to 19 attending a public school would have most of their free time given over to a single activity: team sports. Played at differing levels of ability, a series of seasonal team sports would become obligatory and tournaments, organised by adults, would increasingly be the endpoint of systematic practice throughout the year. Surprisingly enough, the change was anticipated, and maybe in part even promoted, by a very successful book for children.

¹³ Newsome, *Godliness and Good Learning: Four Studies on a Victorian Ideal*, cit.

3. *Tom Brown's schooldays and its influence on public schools*

In 1857, Thomas Hughes, who had been educated at Rugby under Arnold, published a book that became an overnight success: *Tom Brown's Schooldays*. This was the first of what was to become an infinite series of novels and short stories centred round life in an English public school that became a distinct literary genre. The number of school story publications from the second half of the 19th century is truly immense. It could even be argued that the genre still survives today in, for example, the Harry Potter sagas. Leaving aside the magic, the Harry Potter series is to all intents and purposes a 'school story'. No other education model has ever been so extensively narrated. The plot of *Tom Brown's Schooldays* became the blueprint for all subsequent stories by other authors: how an ordinary schoolboy, Tom Brown, deals with life at a public school, going from initial distress, having to endure bullies and humiliations on arrival to gradually gaining self-assurance as he makes friends and learns the rules of the institution and community life. After an interim period of rebellion, disobedience and the quest for independence from the system, the lad accepts his responsibilities, gaining power, recognition and glory within the system, acknowledged as a mature young man selfless in the defence of those weaker than himself, an excellent athlete imbued with a sense of fair play and captain of the school's football team.

Curiously, practically nothing of Arnold's ideals transpires in this account of school life, even if the headmaster appears and is even mentioned by name. The ideals of Godliness and Good Learning and the overriding importance Arnold gave to religion, maturity and commitment to learning, do not enter Hughes' field of vision. Rather, the narration pivots around school life as seen from the perspective of young boys. Their problems, concerns and ambitions are the focus. The plot motifs have to do with survival and self-assertion among peers, the tiresome nature of class- and homework, the passion for sport and matches as a means of proving oneself, the desire and hope to one day be considered a hero first on the playing field and subsequently in the world outside. Tom Brown sets himself clear goals for his experience at Rugby. He puts these into words speaking to a friend. Above all he values athletic prowess, wanting to become captain of the school's team, and is determined by dint of hard work to achieve excellence. His intellectual goals are more modest: learning sufficient Latin and Greek to get a decent place at university. He has then a moral purpose, which is that of being remembered as the boy who always defended the weak and showed courage when challenged by stronger opponents. This was, we discover, a consensus view on the part of the public schools' clients, as shown by Tom Brown's father, Mr Brown, who at the beginning of the book, thinking about what to say to his son on his departure for Rugby, muses that grasping the subtleties of Greek grammar is of little importance: «if he'll only turn out a brave, helpful, truth telling Englishman, and a gentleman and a Christian, that's

all I want»¹⁴. Tom Brown's Rugby is by no means intellectual powerhouse stimulating young minds. It is more a place for learning human relations and growing in moral stature. For a Christian Socialist like Hughes, belonging to a group known as 'muscular Christians', the ideals of religiosity and a sound education are overshadowed by the desire to achieve an honest manliness used to good ends.

Tom Brown's Schooldays started a flood of copycat *bildungsroman* in British literature, all centred on the same theme: the hero, an ordinary yet stout-hearted lad comes of age at school and because of his school. Themes include the cult of the healthy extrovert and fair play, ideals the average person can easily identify with and attempt to achieve. These plot motifs are a far cry from Arnold's vision. Indeed Arnold's ideals are depicted as smacking of an unnatural asceticism, born of excessive speculation, an inherently sterile and somewhat weird occupation. Excessive religious devotion is even considered harmful. Boys that Arnold would have considered ideal students are depicted, in Hughes' book and in the imitations of it that followed, as fragile, sickly characters in need of support, and certainly not as the heroes of the book. The fact remains, however, that Tom Brown was a hit with Victorian readers and a blockbuster for its publisher Macmillan that printed fifty-two editions between 1857 and 1892. Many others were to follow under different publishers. The book impacted the public debate on education and had a hand in changing the face of public schools from then on. As early as 1861 «Blackwood Magazine» would declare:

The British schoolboy has become a hero. His slang has been reproduced in print... until it has become almost as classic as the Scotticisms of Burns or the French that passes muster in polite society... The professional story-tellers rejoice in the addition of another new figure to their repertory of ready-made characters and they put in the sharp public schoolboy side-by-side with the clever governess and the muscular parson. The discovery is due to the author of *Tom Brown's Schooldays*... It is no mean triumph to have been the Columbus of the world of schoolboy romance... It lay within easy reach, indeed, but was practically undiscovered¹⁵.

Bernard Darwin considers Hughes' book at length in his own treaties on public schools. «It is often said», he writes « – so often that it has become extremely tiresome – that Dickens created Christmas. In that sense it may be permissible to suggest that Hughes created [...] the public school spirit»¹⁶.

As a result of Tom Brown's incredible impact on the collective imagination, a whole new literary genre – the school story – arose, and the schoolboy became the most popular type of hero in books for young people in England. Tom

¹⁴ T. Hughes, *Tom Brown's Schooldays*, London, Macmillan, 1957, p. 80.

¹⁵ J. Richards, *Happiest Days. Public Schools in English Fiction*, Manchester, Manchester University Press, 1991, pp. 23-24.

¹⁶ B. Darwin, *The English Public School*, London, Longmans, Green, 1929, pp. 157-158.

Brown became the model of adolescent excellence. From the late 1870s the «Boy's Own Paper», a weekly story paper for boys, the most famous and long lasting periodical for young people ever published in England, produced endless stories cast in the same mould. The magazine formula was simple, systematically alternating classical adventure stories with school stories, written by the most acclaimed children's writers of the time and published as weekly episodes over long periods.

Hughes had presented his own particular, watered-down version of the 'Arnoldian' code, adding a series of other concepts he held dear to describe his Tom Brown's coming of age within the school setting. They were ideals that resonated profoundly with the vast reading public in England of the day. His schoolboy hero was imbued with the ideals of 'Christian socialism', which demanded he be concerned with the welfare and emancipation of those weaker than himself. Hence the importance of physical strength and exercise, *mens sana in corpore sano*, the hero cult – something he took from Thomas Carlyle – and unwavering nationalism. Hughes still revealed a strong religious element. This would, however, become increasingly sidestepped, overshadowed in readers' minds by more important aspects like 'playing the game', giving one's all for the team, showing true team spirit, all the traits that forged the stout character considered the typical product of the English public school. These plot motifs were taken wholesale, repeated and served up innumerable times by subsequent writers. Several, Talbot Baines Reed in particular, made a career of writing enormously popular school stories published as episodes in boys' papers. These magazines were instrumental in disseminating the public school ethos down to those who had never been and would never go to a public school. Importantly, the themes running through this fictional genre mirrored developments in late 19th century English society with the appearance of new ideals, especially the cult of athleticism and imperialism.

4. *Playing the game*

In the 1870s all public schools started to take organised, competitive team sports increasingly seriously. Teachers gave their official backing, seeing sports as an effective 'character building' activity. Previously, official interest in games and matches was scant or non-existent and boys were accorded no privileged status for excelling athletically. This changed radically when sports became an all-consuming public-school interest bound up with the concept of loyalty to one's school and team, and upholding the school's honour by winning competitions against the other public schools. Excelling at sports – being «king of the field» to use Thomas Hughes' term – became the dominant obsessive

concern of public school boys, spurred on by masters and headmasters who saw the advantage of channelling youthful energy into competitive team sports.

As already mentioned, the 1870s were times of great social change. The ideals of Godliness and Good Learning were under assault, as were many other distinctive traits of the early and middle Victorian periods. The very concept of manliness – key to schools attended exclusively by males – had changed. In Arnold's time, manliness meant not being infantile, immature or childlike; it was synonymous with a serious attitude to life and an unflinching sense of duty and responsibility. Now manliness was seen as the opposite of physical weakness, being delicate or effeminate. Increasingly the ideal, authentic 'man' was strong, muscular, courageous, ready to swing into action. The emphasis was no longer on commitment, zeal and devotion¹⁷. In response to the new consensus the mission of public schools was recast to fit the new social status and mindset of the middle classes, proud of British imperialism and fearful of the increasing trade and military competition from other countries. The classes whose children attended public schools approved the new more aggressive, competitive, patriotic spirit that now swept through public schools, making them much more like the picture painted by Thomas Hughes. Not surprisingly therefore the 1870s saw public schools increasingly recruiting the country's great sportsman as teachers rather than the best university scholars. Organisations like the Rifle Corps were set up where boys learn parade drill, how to shoot, organise strategic manoeuvres, obey orders and, of course, command. In keeping with the tone of general public discourse, sermons and teachers' exhortations became more patriotic and militant. The virtues of loyalty and pride in one's unit were a constant underlying theme. Official songs and school anthems were introduced and sung in moments of exaltation or victory over others. They became an enormously important aspect of the 'Old Boys' associations that every public school cultivated, the famous clubs of former pupils that became an institution proper. They were a way of acknowledging that the years spent at school during which men had learned a value system that had marked them for life were crucial, so much so that they would always be identified and identify themselves as 'old boys' of a given public school.

This sea change ushered in the golden age of public schools during which they enjoyed overwhelming national-wide consensus. Poets sung their praises, and men of state – Inevitably former 'old boys' themselves of one or other of the more prestigious institutions – made them famous by reflection. Pupils who had attended them during the last decades of the 19th century wrote glowing memoirs of their days in what were described as marvellous places, splendid institutions of a nation and an empire. Speaking of Wellington, one G.F.H. Berkeley wrote of his former school: «Its main aim was to turn out a hardy

¹⁷ M. Girouard, *The Return to Camelot: Chivalry and the English Gentleman*, New Haven, Yale University Press, 1981.

and dashing breed of young officers». The staff were particularly suited to the task being «competent and muscular Britons all working to create a stamp of boy such as we wanted in the nation and more especially in the Army»¹⁸. Edward Mack, an expert in public schools, defines these institutions during the late 19th century as «primarily meant for the coining of Empire builders»¹⁹. As patriotism and imperialism became an integral part of the current and likely future life of these boys, the school introduced specific officer and cadet corps training. Sports-playing gentleman also had an Empire to run. In the early 20th century Sir Reginald Furse, the officer in charge of colonial recruitment for many years, chose his men on the basis of the character they showed, recruiting especially from the public schools. «As to the Public Schools, they are vital: we could not have run the show without them» – he wrote. «In England universities train the mind; the Public Schools train character and teach leadership»²⁰. Furse set special store by the Prefect system, considering it the ideal training for men destined to go out and govern the colonies.

By 1900 public schools had become a closed, self-contained, highly disciplined community obsessed by team sports and matches, intensely aware of class distinctions and geared to producing the typical all-round English gentleman. Cold showers, country runs, Spartan dormitories, outside washrooms and obligatory sports were all designed to strengthen endurance and physical toughness. Moral character was also key. Self-control and unflinching values were the hallmarks of those born to exercise power. The Prefect system was particularly suited to give young boys a taste of power that only their sense of honour and duty stopped them from abusing. Already in 1864, the report of the Commission for Public Schools claimed that its system had had the greatest positive effect on social life, forging what was considered the English character, promoting better than any other educational format the personal characteristics that Britons claimed as peculiar to themselves: «their capacity to govern others and control themselves, their attitude to combine freedom with order, their public spirit, their vigour and manliness of character, their strong but not slavish respect for public opinion, their love of healthy sports and exercise»²¹.

There was a general consensus that a boy going to a public school practically unconsciously absorbed a code of behaviour that would induce him to 'do the right thing' in any situation. It was there he would learn – and never unlearn – spontaneous obedience to his superiors, acceptance of his position on the hierarchical ladder, a deep-rooted team spirit, absolute reliability and loyalty. The aim was to forge a talented dilettante, trained in nothing in particular, but game for anything, displaying a relaxed air of command, a strong sense of duty,

¹⁸ Newsome, *Godliness and Good Learning: Four Studies on a Victorian Ideal*, cit., p. 201.

¹⁹ E. Mack, *Public Schools and British Opinion, 1780-1860*, London, Methuen, 1938, p. 400.

²⁰ R. Heussler, *Yesterday's Rulers, Syracuse*, Syracuse University Press, 1963, p. 82.

²¹ Mack, *Public School and British Opinion since 1860*, cit., p. 38

deference to his superiors and benign firmness with his inferiors. He epitomised the stiff upper lip Englishman: reserved, with a tendency to minimise problems yet show staunchness of character when needed. The stiff upper lip ideal was the result of being trained in an entirely male environment where, from the late 19th century onward, emotion and the display of emotion were disapproved and derided. Around this time one Reverend T.L. Papillon, although berating public schools for no longer being places of learning and culture, focusing excessively on athletic prowess, nonetheless recognised that on leaving school a typical boy «brings away with him something beyond all price, a manly, straightforward character, scorn of lying and meanness, habits of obedience and command, and fearless courage». «Thus equipped», Papillon continues, «he goes out into the world and bears a man's part in subduing the earth, ruling its wild folks, and building up the Empire, doing many things so well that it seems a thousand pities that he was not trained to do them better, and to face the problem of race, creed and government in distant corners of the Empire with a more instructed mind. This type of citizen, however, with all his defects, has done yeoman's service to the Empire; and for much that is best in him, we owe it to our public schools»²².

The heroic conduct and sacrifice of former public-school men during the First World War show how deeply engrained this ethos was. But surprising – and perhaps more interesting – was the fact that this mindset had percolated down to young Englishmen of humbler origins who had never been to a public school yet who signed up in their thousands to ‘play the game’, do their duty and die in the trenches. During their childhood and adolescence they had all read the school stories that filled not only the «Boy's Own Paper» but also innumerable other highly successful, widely read magazines, like «The Gem», «The Magnet», etc. All carried stories written by Talbot Baines Reed, Frank Richards and others, who after the success of Thomas Hughes had specialised in the new literary genre where the heroes were always brave schoolboys triumphant on sports ground and loyal to their country.

5. *A new literary genre: the school story*

The flood of schoolboy stories, initially represented by the brilliant *Boy's Own Paper* and subsequently by a raft of other magazines, was the result of the general development of children's publishing following the Foster Education Act of 1870 decreeing that primary schools must teach children to read, write and do arithmetic. The law also provided for children's achievement to be tested by external inspectors, the overall results of each class determining whether

²² Darwin, *The English Public School*, cit., p. 21.

schools would receive the state funds earmarked for primary education. Driven by the need to ensure their financing, schools apparently did their job and children effectively left school able to read. And children there were many, their numbers soaring with the introduction of compulsory schooling for everyone in 1876. Another phenomenon that boosted publications for children was the development in these years of new type-composing and printing technologies that cut costs and production times. Most publishers opened a 'juvenile' section that was further broken down into different collections: adventure stories, school stories, edifying stories, etc. A particularly flourishing division was 'reward books', books given as prizes to schoolchildren for their achievements and hard work. On the back of universal elementary education, publishers reaped healthy profits.

The success of the formulaic boys school story was also due to what Mack calls «the greatest upsurge of passionate adoration to which the school had ever been subjected»²³. This adulation is clearly visible not only in schoolboy fiction but also in memoirs, poems and songs. Life at a public school was described in the ardent tones of an adventure story, its value system extolled. The ingredients were always the same: friendships and corporal punishment, jokes and deceit, customs and traditions, a sense of belonging, protection and privilege to be worthy of which the individual had to prove his own loyalty and valour – increasingly of a athletic and moral rather than intellectual kind. Learning and study were rarely the theme of this genre, appearing if anything as a tiresome nuisance getting in the way of the boys' lives. The formula for the school story took its cue from Hughes. Mack sums it up:

a boy enters school in some fear and trepidation, but usually with ambitions and schemes; suffers a bit or severely at first from loneliness, the exactions of fag-masters, the discipline of masters and the regimentation of games; then makes a few friends and leads for a year or so a joyful, irresponsible and sometimes rebellious life; eventually learns duty, self-reliance, responsibility and loyalty as a prefect, qualities usually used to put down bullying or over emphasis on athletic prowess, and finally leaves school, with regret, for the wider world, stamped with the seal of the institution which he has left and devoted to its welfare²⁴.

Among the plethora of contributors, two literary geniuses soon stand out: Rudyard Kipling with *Stalky & Co.*, and P.G. Wodehouse with *Mike*. Although not confining themselves to writing for school-story market like many other authors, their stories nonetheless reflect the wider public debate around education of the time. Kipling was preoccupied with the need for the nation to prepare itself militarily, training its sons from their school years; Wodehouse preached the virtues of athletic prowess. Both their books were resounding successes.

²³ Mack, *Public School and British Opinion since 1860*, cit., p. 134.

²⁴ *Ibid.*, p. 202.

Of course the body of fiction surrounding the public school created enormous expectations amongst those destined to attend one of them. Alec Waugh – himself a public school old boy and passionate advocate of the system, publishing several books describing his love for his former school and the life it offered – claims that boys in preparatory schools read Talbot Baines Reed assiduously as a guide to the life awaiting them²⁵. But the widest public for public school fiction were those boys who would never go to one. The glorious and glorified image of the public school was a splendid surrogate for their often miserable lives and school experience. It encapsulated a desire and yearning for something never had, a powerfully seductive world out of reach. In this way the values and ethos underpinning English public schools and what they stood for percolated down through all classes of English society and its education system. This was all the more evident after the reforms of the 1830s but especially from the 1860s onwards when all types of schools in England started modelling themselves on the public school example. Especially the grammar schools. Thanks to ample funds, grammar schools had prefects, cadet corps, sports teams and put much emphasis on patriotic themes. However, not being boarding schools, isolated units closed to the outside world where boys spent long periods without leaving, they could never become ‘total institutions’ like the public schools. Nonetheless many English day schools had military exercises on their curriculum for boys as a way of instilling discipline. And history and geography went increasingly hand-in-hand with the promotion of patriotism. From the 1870s the Acts of Parliament regulating primary school education and schooling for the poor aimed at exposing working-class children to middle-class culture and promoting the exquisitely middle-class values of discipline, thrift and hard work. A well functioning grants system allowed the brightest to escape poverty and achieve upward social mobility. All this was conducted against the backdrop of patriotism, duty and service, implicitly seen as the only way of assuming the virtues displayed by school-story heroes, with whom all boys wanted to identify.

Although records tell us that there was considerable reluctance by the poor to adopt alien ideals and be ‘improved’ by exposure to the dominant ideology and its values through the national school system (school registers and reports of the time mentioning for instance rampant absenteeism and insubordination), indoctrination, however, could and did take other, subtler forms. These included the widely available school story published in the many cheap – and hence readily accessible – magazines and papers that abounded in the late 19th century²⁶.

Commenting on their life’s work with the Lads’ Clubs, youth centres in deprived neighbourhoods, C.B.E. Russell and L.M. Rigby note how the most

²⁵ A. Waugh, *Public School Life*, London, W. Collins, 1922, p. 31.

²⁶ Mack, *Public Schools and British Opinion, 1780-1860*, cit.

popular books among working-class boys were exactly the same that delighted upper-class boys of the same age. Whatever their social status, they report, the same rule applied: younger boys preferred school stories while older ones liked tales of adventure. It may be assumed from comments like these that even working-class boys were voracious readers and that the books they read were of their own choosing, and as a result had even greater impact. Appearing in the later part of the 19th century, this completely new literary genre targeting the young reader was considered 'entertainment' and a far cry from the overtly didactic, moralistic stories for children and adolescents of previous years. New stories were read spontaneously for pleasure, anxiously awaited each week, and back numbers were sought out by the whole spectrum of young English readers²⁷. For middle-class boys this sort of leisure reading reinforced the ethos presented at school. For the children of poorer families, it was the source of unfamiliar values that they thus started to make their own.

Conclusions

This school-story literary phenomenon helps explain how the ideas and values promoted by a school system addressing only a small sector of the population were acknowledged across the whole social spectrum in England and recognised as the mould that produced what was proudly seen as the typically English character, a breed of better men destined to further their country's prestige. For the explicit aim of the public school system was to form not courtiers but gentlemen in the middle-class sense of the word. Initially this had epitomised men of profound culture and spirituality in accordance with the evangelical revival of the early Victorian age. Later, towards the end of the century, as the aspirations and anxieties of competitive imperialism took hold, a gentleman was increasingly considered as a man of strong character, able and courageous in both body and mind. A whole new genre of fiction depicting the lives of the boys living within the walls of public schools as heroic and thrilling help create and sustain a myth among all English children and young adults, even among the poorest, who for the first time in history had become literate with access to low-cost printed material. As well as entertain and amuse, this literature would mould young minds, its message strong, if not always explicit.

These ideals were to lead to the full-scale massacre of young men during the First World War. Yet despite a general contemporary consensus that the war and enormous loss of young lives marked a definitive break with the past, the public school system changed relatively little between the two wars. The ideas underpinning the system, the basic practices and consolidated traditions dating

²⁷ C. Russell, L. Rigby, *Lads' Clubs*, London, Macmillan, 1908.

back to the late Victorian period remained intact²⁸. It was the Second World War that proved the true watershed. After 1945 public schools started taking a different, decidedly more academic approach. Curricula were gradually reformed and fleshed out, especially with science subjects. Perhaps it was only then that they obtained the academic excellence Arnold and other teachers of his time had dreamed of. But again, as with all the other changes, this new approach came in the wake of changed attitudes among the middle classes. The gradual dissolution of the Empire and the drastic slimming of the armed forces once needed to sustain it meant that fewer public school boys could expect future employment as officers or administrators. Careers now lay in industry and finance. During the 1950s and 1960s fagging – the system whereby new boys had to ‘serve’ seniors – was abandoned, corporal punishment drastically reduced, the tyranny of athletics and games set aside, and cadet corps and religious attendance were no longer compulsory. From the 1970s women were also admitted to the teaching staff. Public schools, now attended by very few, had undergone a revolution similar to that of the 1830s and late 19th century. The school-story genre, born of a specific era and mindset, did not survive the last world war and the revolution it brought with it.

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²⁸ Mack, *Public School and British Opinion since 1860*, cit.

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Kelemen (Hungarian Academy of Sciences, Hungary); Pigga Keskitalo (Sámi University College, Norway); Adriana Kičková (University of Nitra, Slovakia); Francisco Javier Lasपालas Pérez (Universidad de Navarra, Spain); Daniel Lindmark (Umeå University, Sweden); Juri Meda (Università degli Studi di Macerata, Italy); Maria Cristina Morandini (Università degli Studi di Torino, Italy); Gabriela Ossenbach Sauter (Uned, Spain); Michel Ostenc (Université de Angers, France); Riccardo Pagano (Università degli Studi di Bari, Italy); Merja Paksuniemi (Institute of Migration, Finland); Elisabetta Patrizi (Università degli Studi di Macerata, Italy); Furio Pesci (Università La Sapienza di Roma, Italy); Helena Pimenta Rocha (Universidade Estadual de Campinas, Brasil); Pablo Pineau (Universidad de Buenos Aires, Argentina); Joaquim Pintassilgo (Universidade de Lisboa, Portugal); Simonetta Polenghi (Università Cattolica del Sacro Cuore di Milano, Italy); Edvard Protner (Università of Maribor, Slovenia); Erika Sarivaara (Sámi University, Norway); Marika Savukoski (Municipality of Pyhäranta, Finland); Miguel Somoza Rodriguez (Uned, Spain); Bernat Sureda García (Universidad de las Islas Baleares, Spain); Fabio Targhetta (Università degli Studi di Padova, Italy); Ariclé Vechia (Universidade Tuiuti do Paraná-Curitiba, Brazil); Javier Vergara (UNED, Spain); Paola Vismara (Università degli Studi di Milano, Italy).

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