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*The development of teacher education
in the countries of
Central and South-Eastern Europe*
Proceedings of the International Conference

Maribor (Slovenia), 11-13 October 2012
University of Maribor, Faculty of Arts

edited by
Edvard Protner and Simonetta Polenghi

The development of teacher training in the countries of Central and South- Eastern Europe

Foreword to thematic section of the issue

The editors

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ABSTRACT: Scholars from the Central and South-Eastern European states convened in Maribor at the symposium which took place in 11-13 October 2012 at the University of Maribor, Slovenia, in order to debate on the issues of the evolution of teacher training – and the related theme of Central European development of schooling –, and how these processes have affected, and have been affected by, the historical circumstances and political trends as well as theoretical and pedagogical influences. A comprehensive scenario has taken shape, thanks to the strong comparative approach focused on the problematic notion of «Central Europe» and on the reciprocal political and theoretical influences in this area, approach which contributed to a further understanding of the influence that has shaped European school systems.

EET/TEE KEYWORDS: Teacher Education; History of Education; Education System; Pedagogical Theory; Educational Policy; Europe; XVIII-XX Centuries.

The research into the development of teacher training is particularly important for the history of pedagogy and schooling. Throughout history, it is largely the pedagogical ideas future teachers have acquired during training

that have actually been implemented in educational practice. The quality of teacher education has always been dependent on broader cultural and historical circumstances, academic and political trends, organizational and systemic solutions, and theoretical and pedagogical influences.

The title theme was explored at a symposium which took place from the 11th to 13th October 2012, organised by the Department of Pedagogy at the Faculty of Arts, University of Maribor (Slovenia) (<http://events.ff.uni-mb.si/dte/>). The original plan for the conference sprung originally from the desire to meet with our colleagues from the former Yugoslavia, who we had met and begun to cooperate with on the project: *Historic comparative research for development of teacher education (Historische komparatistischen Forschungen zur Entwicklung der Lehrerbildung)* which came to an end in 2012¹. The meeting was first conceived with the title *The Development of Teacher Education in the Former Yugoslav States*. Driving us was the wish to meet again, get to know one another better, strengthen cooperation and exchange our experience of researching the history of education and schooling in the newly-formed states of our once common country. However, as the development of teacher training in its historical genesis is so tightly bound to that of the Austro-Hungarian monarchy and because recently the department has built up close contacts with fellow academics from Hungary, Austria, Italy and Germany, we decided to also invite them to take part. This invitation led us to reconsider the title and to widen the conference theme, which became *The Development of Teacher Training in the Central and South-Eastern European States*. This broader concept in turn influenced the decision to invite participants from Bulgaria, Romania and the Czech Republic.

Despite some difficulties in understanding the notion of «Central Europe», we began from the assumption that the Austro-Hungarian monarchy played a central role in the historical development of this area. The term «South-Eastern Europe» is also not unproblematic; however, it can with certainty include all those states that once belonged to the territory of former Yugoslavia. The time frame of the conference was set from the second half of the 18th century, when institutional forms of education began to take shape under state control, through to the 1980s, when sweeping political and social changes took place in the former Eastern block states. This geographical and historical framework offers interesting possibilities for the analysis of interacting influences, as teacher training in this area developed to a large degree under the heavy influence of the legal regulations and pedagogical currents within the monarchy.

The articles included in the thematic section of this issue are arranged geographically, in terms of their direct administrative ties to the Habsburg and later Austro-Hungarian monarchy, and their distance from this centre.

¹ The project, led by András Németh, took place as part of a larger project at Eötvös Loránd University in Budapest, supported by The European Union and European Social Fund.

Of course, we understand today's Hungary to be this centre. Imre Garaia's article *The Baron József Eötvös Collegium as an elite teacher training institute – the analysis of the admitted members between 1895 and 1950* indicates certain significant particularities concerning the teacher training system within Hungarian section of the dual (Austro-Hungarian) monarchy. The institutions that train teachers are ascribed great importance in each national environment, yet the high quality of the training in the presented college, which did not merely allow pre-graduates to attain high professional standards in their teaching career, but also entrance into an elite academic career, was unimaginable in the other national sectors of the monarchy.

Tomáš Kasper and Dana Kasperová's contribution, entitled *Professional and National Emancipation of Czech Teachers in the Last Third of the 19th Century – Reasons, Objectives, Experience, and Reflection*, presents even more explicitly the problem of finding one's own teacher identity within the multi-national framework of the monarchy.

The central reference point that in all the states within the Austro-Hungarian monarchy stands as both benchmark and landmark moment in the Central European development of schooling (and within this also teacher training) is the 1869 State Law on Primary Schooling (*Reichsvolksschulgesetz*); this was also the case in the Czech Republic. The name already indicates that this law rounded off the development of the legal regulation of the school system, which has its roots in the Maria Theresa's school reforms and the first law on primary schooling (1774). It is into this administrative framework that Eva Kaněčková has placed her article *Formation and Institutionalisation of Education for Female Teachers, during the Second Half of the 19th century in the Czech Lands*. It also illustrates just how significant the 1869 law was in Central Europe, which in parallel to the founding of four year teacher training colleges for men, also regulated for equal female institutions.

The mentioned legislation also heavily influenced the development of teacher training in Northern Italy. The development of elementary school teacher training in Lombardy is presented in Simonetta Polenghi's article *Elementary school teachers in Milan during the Restoration (1814-59): innovations and improvements in teacher training*, which underlines the improvements brought by the Austrian school laws and by the introduction of Milde's pedagogy, and shows how in Milan, capital of the Kingdom of Lombardy and Venetia, these improvements were immediately followed, more than in other districts such as in Venetia, with positive long term consequences.

Education law from the period of the monarchy also completely determined that development of schooling in today's Slovenia. Edvard Protner traces this in his article entitled *The Development of Private Education Regulation in the Field of Teacher Training in Slovenia*. Here, the reader can form an impression of the fundamental features of the development of education legislation that determined teacher training on the territory of the Habsburg monarchy and

Austro-Hungary. At the same time, the author outlines the characteristics of this development in private education (in Slovenia), which took place entirely under the auspices of the Catholic Church.

Slovenia, as the northernmost state of the former Yugoslavia, was most susceptible to the Austro-Hungarian influence. As we move towards Southern Europe, the next country that we find in the former Yugoslav states is Croatia. Within the Austro-Hungarian monarchy, Croatia enjoyed more autonomy than Slovenia, yet its school legislation until the end of WWI was still fundamentally connected to that of the Austrians, indeed Hungarians. Štefka Batrinić and Igor Radeka in their article *The development and prospects of teacher education in Croatia* present the development of teacher training in Croatia until the Bologna reforms.

The historical development of system-wide solutions in the field of teacher training in the states from the territory of the former Yugoslavia was from the beginning conditional on significant differences in the political, cultural and economic situations of the states, which were in one way or another subject to Habsburg (Austro-Hungarian) monarchy to the north and the Ottoman Empire to the south. The process of bringing together the concepts of teacher training in the northern and southern sections is connected to the process of liberating the Yugoslav nations from Ottoman power and the gradual acceptance of the four year teacher training colleges' model, which was enforced in the Austro-Hungarian monarchy after the acceptance of the mentioned 1869 State Law on Primary Schooling (*Reichsvolksschulgesetz*); this was also the case in those parts of former Yugoslavia that were not under Habsburg influence, or who came under it later, for example, Bosnia Herzegovina. Snježana Šušnjara describes the development of teacher training in Bosnia Herzegovina in her article *The Position of Teachers in Bosnia and Herzegovina During the Austrian-Hungarian Monarchy*.

It is also interesting to trace the development of teacher training in what we know as Serbia today, as her northern section was historically tied to the Habsburg monarchy, while in the south the Ottoman Empire predominated. Nataša Vujisić Živković and Vera Spasenović's article entitled *The Development of Primary School Teacher Education in Serbia in the 19th and the First Decade of the 20th Century* allows us to retrace the influence of and gradual adaptation to the teacher training model that was in existence in the Austro-Hungarian monarchy.

A small section of today's Montenegro was under Austro-Hungarian control, too. This did not, however, directly influence the institutional development of teacher training, yet it is possible here to recognise the gradual acceptance of the Austro-Hungarian model, as described in the article *The Development of Primary School Teacher Education in Montenegro* by Vučina Zorić.

The southernmost state of former Yugoslavia is today's Macedonia. Her historical development is closely tied to the cultural, political and administrative

frameworks of the Ottoman Empire. Suzana Miovska Spaseva presents the development of teacher training in the article *Development of Primary Teacher Schooling in Macedonia (1869-1963): Roots and Fruits of a Century-Long Tradition*.

Unfortunately, we were unable to persuade an author from Kosovo to take part, in order to include all states from the territory of the former Yugoslavia. However, the presentations of the development of teacher training gathered here allow us to get an interesting insight into the development of the school system in a particular geographical area, starting out from a state of pronounced cultural, religious, economic and political differences (pre-WWI) to a situation of political unity in one state, which also restored a unified educational legislative framework (the between wars period) and continues with a state of not entirely equal legal regulations between different entities of the same state (post-WWII period) to the break-up of the state and the repeated diversification of educational–legislative systems, which under the influence of globalisation trends (in our case represented by the Bologna reforms), lead once again into the unification of numerous system-wide educational measures.

The thematic section of this issue is brought to a close by Ana Sima's article *From the Enlightenment to Philanthropinism in the Pedagogical Thought of the Romanians from Transylvania, the Banat and Hungary (1776-1848)*. The depiction of the influence and presence of pedagogical ideas from the German-speaking world in South-East Europe rounds off the presentation of the flow of pedagogical thinking in the region.

As participants in the symposium, we have discovered to our pleasure that a regionally and thematically focused discussion of this type can result in high-level comparative analyses, contributing to a further understanding of the influence that has shaped our school systems and we believe that the thematic section of this issue confirms this. The idea that we carry on to consolidate this type of regional cooperation in the field of the history of pedagogy and schooling has really come to life– the result of which is the October 2013 conference being organised by Tomáš Kasper at the Technical University of Liberec in the Czech Republic (<<http://dejiny-ucitelskeho-vzdelavani.fp.tul.cz/index.php?lang=en>>).

The development of private education regulation in the field of teacher training in Slovenia

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ABSTRACT: The article traces, in parallel to the reconstruction of the legislation governing teacher training, the development of the legal regulation of teacher training within the private sphere. Until 1918, fundamental shifts in the legal regulation of teacher training in the Austro-Hungarian monarchy, of which Slovenia was a part, were brought about by the primary school laws of 1774, 1805 and 1869. Until the 1869 State Law on Primary Schooling (*Reichsvolksschulgesetz*), the Catholic Church had been so influential in this area that they had felt no need whatsoever to establish their own teacher training. One form of private teacher training appeared in the area concerning women teachers. In Slovenia, Catholic nuns (the Ursulines and School Sisters) were responsible for organising this training. The need for private training, therefore, had a social impetus – during this period, no-one else was providing teacher training for women. After 1850, the state began to regulate private education more thoroughly with the Provisional Law on Private Education (*Provisorisches Gesetz über den Privatunterricht*). The Catholic Church began to lose its grip over schooling, hastened by the 1869 law, which among others opened the way for the establishment of state male and female teacher training colleges. The motives for teacher training within the Catholic Church were no longer of a social nature; instead, ideological reasons came to the fore – ensuring appropriately religious teachers for the state and their own Catholic schools. In Slovenia, three private female teacher training colleges were in operation until WWII; the post-war socialist state, which looked less than favourably on the church, withdrew private schools completely.

EET/TEE KEYWORDS: Teacher Education; Women's Work; Private School; Religious Education; Educational Policy; Slovenia; XVIII-XX Centuries.

Introduction

The reconstruction of the development of legal regulations concerning private schooling is viewed mainly through the change in relationship between state and church in the establishing of the public school system. In the Habsburg monarchy, which most of present day Slovenia (both politically and geographically) was a part of, the Catholic Church was traditionally the main provider of school-based education until the second half of the 18th century. Within this area, we should not overlook the various forms of school and non-school based education that fulfilled the needs and interests of local groups (traders and craftsmen in towns) and home-based schooling. The founding of the Court Study Commission¹ in 1760 can perhaps be seen as a shift in the traditional domination of the church in education, and as a reflection of the ambition of an enlightened absolutist state to assume control over all aspects of social life including education. Education is highlighted in particular, as the state was not satisfied simply with supervising and guiding school-based forms of education, but instead attempted to subordinate and unify even the sector of education conducted within the privacy of the home. The unified and compulsory education of teachers at that time began to stand out as a bureaucratic weapon the state could employ in directing and supervising schooling, upbringing and education. In fact, the systematic and institutionalised training of teachers (in comparison to the already long history of schools) developed extremely late – and it is no coincidence that it took place in parallel to state intervention.

However, state intervention in education in no way meant that the state excluded the church or limited its influence on the content or method of teaching in schools. The influence of the church after Empress Maria Theresa's declaration that schooling is a «politicum»² was exceptionally strong and after 1805, even dominant. The position enjoyed by the church did not begin to weaken because the state would begin to strip away its school privileges, but because (after 1848, which will be shown later) one of the founding principles of civil society came into effect: that every citizen has the right to found a private school and teach in that school if they meet the relevant criteria. Combined with the constitutional right that declares science and education to be free, a shift took place toward the secularisation of society. This forced the church, whose own interests were not being met to a large enough extent by public state school system, to begin founding their own schools. In the field of teacher training, this move took place centuries after the founding of the Court Study Commission.

¹ H. Engelbrecht, *Geschichte des österreichischen Bildungswesens. Erziehung und Unterricht auf Boden Österreichs, Von der frühen Aufklärung bis zum Vormärz*, 5 vols., Wien, Österreichischer Bundesverlag, 1984, Vol. III, p. 84.

² *Ibid.*, p. 98.

The article traces the establishment of primary school teacher training within the framework of the development of primary school legislation. As part of this, we outline the moves and shifts that took place system-wide, and at the same time, we highlight the legal frameworks that provided for and regulated the operating of private schools, focusing particularly on those that trained teachers. Most of present-day Slovenia was governed by the Austro-Hungarian monarchy (until its break-up). We will see that the only form of private teacher training here was offered by nuns. This is also true of the period between the two world wars, when Slovenia found itself part of a new state: The Kingdom of Serbs, Croats and Slovenes (later the Kingdom of Yugoslavia). After WWII, the tradition of private teacher training was brought to an end, which is described in the conclusion.

Teacher training within the first Austrian law on primary schools

There were so many proposals for educational reform in the Habsburg Monarch in the 1760s and early 1770s that far-reaching intervention in schooling could no longer be put off. The state required morally developed (as well as economically efficient) citizens, who would not submit to a subordinate role because of ignorance, but because they themselves recognised the sense and purpose of a *rationaly* organised state. Raising the level of education of the common man would ensure greater economic and political efficiency, and this task could only be carried out by a teacher with the knowledge demanded of him by the state³.

One way out of the mass of suggestions, which long remained incoherent, was presented by an authority respected by all, the Catholic abbot, Ignaz von Felbiger. At Maria Theresa's request, he moved from Sagan in Silesia to Vienna to organise primary schooling and teacher training. His own pedagogical outlook was heavily influenced by the development of non-classical secondary schools, which had been founded in Berlin in 1726 and led by Johann Julius Hecker. Hecker in turn had founded the didactic principle of non-classical secondaries under the influence of pietistic pedagogy, as he caught the last of Francke's lectures in Halle and taught there for some time. In his non-classical secondaries, the first Prussian teaching seminar was organised, taught by J.F. Hähn, the well-known and acclaimed practitioner of elementary education. Through his work in the non-classical secondaries, Felbiger grew familiar with pietistic and enlightened pedagogy, incorporating elements of them into school

³ E. Protner, *Pedagogika in izobraževanje učiteljev (1919-1941)* [Pedagogy and Teacher Training], Nova Gorica, Educa, 2000 (in Slovenian).

legislation in the dukedom of Silesia⁴, and also, after his arrival in Vienna, into the first Austrian primary school law: *General Decree on Schooling* («Allgemeine Schulordnung»)⁵ in 1774. This law, besides prescribing the organisation and content of compulsory primary schooling, also introduced into law the systematic training of teachers as a condition for carrying out the job of teacher in the Habsburg Monarchy, and therefore in Slovenia.

The legal – and therefore the state – regulation of education in the second half of the 18th century was therefore not primarily directed toward ending the church monopoly in this area, as church schools remained part of the public education system. The state intervened predominantly in the field of private education in the home, which represented too great a competition to state schools, and at the same time withdrew from the control and ideological unity that the authorities were pressing for.

Let us consider the relationship toward private schooling and schools contained by the *General Decree on Schooling* and the role teacher training was given within this framework.

In order to «sort out the entire education system once and for all» the first article of the *General Decree on Schooling* set out three types of primary school: standard schools (*Normalschule*); main schools (*Hauptschule*) and rural schools (*Trivialschule*). Every county was required to appoint a commission comprised of at least two members: one authorised by the ordinary's office, and the other the principal of a standard school. The task of the commission was to guide, supervise and report on the state of education in its county.

The law did not actually reorganise the school network completely – there were insufficient funds for such a purpose. The third article of the *General Decree on Schooling* made clear that in the implementation of the mentioned categories of primary schools «the intention is not to start from scratch with these schools, or to put new teachers in place, but rather to improve the way existing schools function, and to encourage existing teachers to familiarise themselves with the inherited county prescribed methods of teaching». In this sense, the law specifically states, that all those who had the right pre-law to found and maintain schools retain that right («church or secular; male or female»). The essence of this state intervention can be found in the condition that no-one who «is not well-versed in the prescribed teaching method and has not passed the standard school exam» has the right to hold a teaching position.

The implementation of a unified state curriculum was therefore at the forefront of this initiative and could only be achieved through organised and unified teacher training. The form and content of this training was defined by

⁴ R. Gönner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, Wien, Österreichischer Bundesverlag für Unterricht, Wissenschaft und Kunst, 1967, p. 35.

⁵ *Allgemeine Schulordnung für die deutschen Normal-, Haupt- und Trivialschulen in sämtlichen Kaiserl. Königl. Erbländeren*. The 1774 law has been summarised from the reproduced version in Engelbrecht, *Geschichte des österreichischen Bildungswesens*, cit., pp. 491-501.

the fifth article, which clarified the obligations of standard schools - the schools that were supposed to represent the norms of the new method of teaching in the main cities in individual counties. Future teachers in these schools were supposed to familiarise themselves with the content of primary school classes, acquire knowledge of the teaching method and actually put it into practice, learn how to maintain school discipline, manage the school records and «control their behaviour when under inspection». How strong the state's desire was to unify the curriculum is clearly demonstrated in the demand that all those who wish to become a house teacher must acquire the same knowledge as those who wish to become a school-teacher.

While the law did not introduce detailed regulations on teacher training, the seventh article does state that to achieve the «unification of teaching method» teachers as well as pupils must have the same textbooks. Future teachers were required to study Felbiger's handbook, entitled *The Method Book* («Methodenbuch»)⁶, which was supposed to prescribe appropriate behaviour in all possible situations the teacher may face. This handbook contains the entire content of teacher training – in this article the law states that certain «more talented» teachers can read other books with similar content that would further their knowledge; however, the next article again mainly limits the content of teacher training to *The Method Book*. In this article the law prescribes certain founding didactic principles of primary school education. Those that stand out are the demands for the implementation of collective lessons, concerning group reading, the use of tables and spelling, according to the prescribed method. All of this is clearly explained in *The Method Book*, which according to the law, the teacher was required to «follow precisely».

The role of teacher training can therefore be seen in its first legally prescribed form as incredibly simple: all those who wished to be involved in any way with the elementary education of children had to thoroughly familiarise themselves with the instructions of *The Method Book* and prove their mastery of it with an examination. The central body for the training of teachers in Slovenia was the standard school in Ljubljana, which offered courses from 1777⁷. House teachers and priests, and indeed theology students, were also obliged to attend these courses (in accordance with the law).

⁶ Despite its universal purpose, the handbook was too demanding for use in teacher training, which is why in 1777, Felbiger published a shortened version sub-titled *The Core of the Method Book; for provincial teachers in the empire's royal lands* («Kern des Methodenbuches, besonders für Landesschulmeister in den k.k. Staaten»). A Slovene translation appeared in the same year, described by Vlado Schmid as the first pedagogical book in the Slovene language. See V. Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem* [The History of Schooling and Pedagogy in Slovenia], 3 vols., Ljubljana, Delavska enotnost, 1988, Vol. I, p. 215 (in Slovenian). This 'extract' contained the minimal requirements in terms of knowledge for those who intended to train as teachers.

⁷ *Ibid.*, p. 204.

This first institutionalised form of teacher training was therefore the result of state intervention in a field that had been previously entirely regulated by the church and domestic private initiatives. However, what interests us here is the development of teacher training within private schooling.

Which schools then, according to the legal framework presented in the *General Decree on Schooling*, were categorised as private schools? The categorisation here is far from clear, as the purpose of the *General Decree on Schooling* is not the implementation of compulsory general schooling with the founding of public schools, but primarily the unification and subordination of all existing and newly founded schools to the legal requirements. It seems that the origin of the private initiative in teacher training has to be sought elsewhere, where the state did not clearly and equally regulate and satisfy the needs of certain social groups – in this case, women. *The General Decree on Schooling* otherwise did demand compulsory schooling for children of both sexes and also foresaw, where necessary and where conditions allowed, the founding of girls schools. However, nowhere does the law mention female teachers and it is obvious that when teacher training is referred to, it is in actual fact referring simply to the training of male teachers. It is true that there were few women who wanted to become teachers; however, we cannot overlook the existing teaching of craft by woman and of course, all of the teaching carried out by nuns in convents. The tradition of female convents in Slovenia dates back to the 10th century. The teaching of girls was in one form or another carried out by various orders, yet from the developmental point of view, the institutionalised forms of teacher training relevant for our discussion are those of the Ursuline⁸ and School Sisters⁹.

Although the *General Decree on Teaching* did not mention female teacher training, there was a regulation that all those who intended to be involved in teaching in schools must pass an exam at a standard school; this was compulsory and included even the nuns. Since the courses for teacher training at standard schools were not intended for women, the nuns (and also the secular teachers and those who intended to teach in schools) had to find a way around this. The Ursuline convent in Ljubljana serves as a typical example for Slovenia and we can trace the development of private teacher training there.

⁸ There were convents on Slovene ethnic territory in Klagenfurt (1670 today's Austria) in Gorici (1672 today's Italy) in Ljubljana (1702), Škofja Loka (1782) and Mekinje (1902). See J. Kogoj, *Uršulinke na Slovenskem* [The Ursulines in Slovenia], Ljubljana, Uršulinski provincialat v Ljubljani, 1982 (in Slovene).

⁹ Teaching activities were run by them in Maribor from 1864. In 1869, the independent congregation of St. Francis of Assisi was established. See *Kronika matrne hiše šolskih sester v Mariboru 1864-1919, 1914-1922 in 1939-1941* [Chronicle of the Mother House of School Sisters in Maribor 1864-1919, 1914-1922 and 1939-1941], Ljubljana, Kongregacija šolskih sester sv. Frančiška Kristusa Kralja, Mariborska provinca, 2006 (in Slovene).

The focus of the Ursuline nuns' attention was traditionally connected with the educating and founding of schools. They arrived in Ljubljana in 1702 and in the same year were given permission to open a school for girls. The so-called inner school was attended by girls who also lived in the school; in the outer school, girls attended during the day and went home in the evening. The outer school was attended by girls from various social classes and was free of charge for the majority of them¹⁰. The implementation of the *General Decree on Schooling* and the compulsory schooling it brought begged the question in Ljubljana of whether it was necessary to found an independent school for girls. Felbiger dispersed the embarrassment with his assessment that a separate school was not required for girls if the Ursuline nuns were prepared to teach their girls by the new method¹¹. As the Ursuline nuns were unable to be trained in the new method at a standard school, as the co-education of males and females at the time was unacceptable, a solution had to be found. Similar to the way in which the principals of standard schools were informed of novelties and trained for teacher training¹², in this case, a young lady by the name of Kohllöffel was trained in Vienna and sent in 1778 at the expense of the empire to teach pedagogical subjects to the Ursuline nuns in Ljubljana and Gorica (Gorizia)¹³. In the presence of the administrator for school affairs, Count Janez Nepomuk Edling¹⁴, some of the nuns passed the pedagogical competence exam (with honours)¹⁵. The fact that the state unquestioningly accepted the training offered by the church simply proves that Felbiger knew the work of the Ljubljana Ursulines well, and because of their good work, even recommended their school for support in 1779¹⁶.

Just as the Ursulines in Ljubljana did, the Ursulines in Škofja Loka solved the problem of the teacher training in their schools in such a way that they adapted the somewhat truncated form of pedagogical courses to meet their own needs. In Ljubljana, the nuns were lectured to by a standard school principal (priest), or taught by the catechist (as, for example, in Škofja Loka) at their own girls' school. The exam, which was taken in the presence of the diocese school inspector, did not differ from the exam taken by male candidates¹⁷. The line between public and private education was at that point so blurred that these

¹⁰ M.J. Kogoj, *Uršulinke in njihovo vzgojno poslanstvo, Uršulinski samostan v Ljubljani na prehodu iz avtonomije v Rimsko unijo, s posebnim poudarkom na šolstvu v letih 1868 in 1918* [The Ursulines and Their Educational Mission, The Ursuline Convent in Ljubljana at the Transition into Independence in the Roman Union], Ljubljana, Družina.

¹¹ *Ibid.*, p. 150.

¹² This is how the first principal of the Ljubljana standard school, Blaž Kumerdej, was trained.

¹³ Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, Vol. I, cit., p. 215.

¹⁴ He was very active in the organisation of primary schooling and pedagogical training in Kranj – he was the translator of *The Core of the Method Book* referred to in footnote 6.

¹⁵ Kogoj, *Uršulinke in njihovo vzgojno poslanstvo*, cit., p. 150.

¹⁶ *Ibid.*

¹⁷ Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, Vol. I, cit., p. 215.

forms of training cannot be classified as private, although it is possible to see the origin of later forms of private teacher training (male and female) in Slovenia. The teacher training offered by the Ursulines in Ljubljana was so rich and well-established that in 1806 they were granted the right to teach pedagogical courses – which in fact meant that they had the right to train female teachers in the, at that time, accredited form of preparatory school (teacher training school)¹⁸. This right coincided with the 1805 second Austrian law on primary schools, the *Political School Constitution* («Politische Schulverfassung»).

Teacher training within the 2nd Austrian primary school law

This law was shaped under the heavy influence of the priesthood and passed control over schooling – in contrast to the first law, which ran under a system of state supervision – over to the Catholic Church¹⁹. This does not mean that the state withdrew into the background-instead, it means that cooperation in meeting the goals of education and training was strengthened; on this point, the state and church were united. The priests who supervised schools carried out this task as civil servants.

Let us take a look first at the legal regulation which (similar to, although to a greater degree than the *General Decree on Teaching*) defined the training of teachers in public and private schools.

The eighth chapter of the *Political School Constitution*²⁰ entitled «The Education of Catechists, Male Teachers, Female Teachers, Assistants, Private Teachers and House Teachers» (*Hofmeister*), requires the passing of an exam in catechism and pedagogy from all priests and nuns in public or monastery schools. Candidates for teaching in convents or girls' schools had to take the exam in the presence of the highest ranking official, regardless of whether they intended to teach in public or private schools. The law also demanded of all those who wished to provide tutoring at home that they attend lectures in pedagogy at standard or main schools. In essence, unless you had passed a «course in pedagogy», you were not qualified to teach.

The regulations state that the law differentiated between public, monastery (obviously, Catholic) and private schools. Schools of a faith other than Catholic belonged to a special category – and can be regarded in the same way we regard

¹⁸ Kogoj, *Uršulinke in njihovo vzgojno poslanstvo*, cit., p. 173.

¹⁹ The circumstances of its establishment and content are analysed in detail by Engelbrecht, *Geschichte des österreichischen Bildungswesens*, cit., and focus on the situation in Slovenia. V. Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, 3 vols., Ljubljana, Delavska enotnost, 1988, Vol. II.

²⁰ The content is taken from *Politische Verfassung der deutschen Schulen in den K.K. deutschen Erbstaaten*, Wien, [s.n.], 1806.

private schools in the modern sense. The 23rd article of the law states that if members of a non-Catholic faith wish to found a school, they are allowed to by law but must do so at their own expense²¹. Their teachers, just like teachers of Catholic children, had to teach subjects «in the prescribed manner, as at elementary or main schools», and also had to have the appropriate qualification. In what is present day Slovenia, which was regulated by Austrian law, there were no larger or enduring private church schools of other faiths; existing Catholic (monastery) schools were not treated as private in the same sense as private schools of other faiths. We can say that in general, the state and the Catholic Church, also in the first half of the 19th century, had no interest in supporting and legally regulating private education, as the Catholic Church did not categorise their schools as private and the state accepted this entirely. This clearly illustrates the fact, suggested by Franc I. in August 1828, that future primary school teachers should be trained in seminaries or monasteries; the main purpose of which was to create appropriately pious and politically loyal teachers. The Catholic Church agreed with this idea, yet the costs, which the church would have met, prevented it from coming to fruition²². Those private and secular schools that already existed came under continuous pressure and interference from the state – a private school could only operate with the permission and strict control by political authorities and only teachers certified by Catholic authorities had the right to teach there²³.

In the area of teacher training, the new law brought little new – teacher training still retained the form of several month long «preparatory» courses in standard and (to a subsequently greater degree) main schools. Candidates for teaching in rural schools had to attend a three month course at the county main school, while candidates for teachers in main schools had to attend a six month course in standard schools. The head teachers of standard and main schools were for the most part priests – they lectured in pedagogy in these courses, while the standard and main schoolteachers were given a practical introduction into their work. After completing the course, the candidate had to pass a test in the presence of the Deanery's school supervisor²⁴. All suggestions for the transforming of these courses into teachers' seminars (independent schools) or for prolonging courses was rejected by the Court Commission on the grounds that teachers at rural schools did not require a high level of knowledge for

²¹ The *Political School Constitution* appeals to the regulations from 25th and 31st January 1782 and 14th November 1783.

²² V. Schmidt, *Učiteljsko izobraževanje na Slovenskem v prvi polovici 19. Stoletja* [Teacher Training in Slovenia in the First Half of the 19th Century], «Sodobna pedagogika», n. 5-7, 1958, p. 194.

²³ A. Ficker, *Bericht über österreichisches Unterrichtswesen. Aus Anlaß der Weltausstellung 1873. 1. Teil. Geschichte, Organisation und Statistik des österreichischen Unterrichtswesens*, Wien, Beck'sche k.k. Universitäts-Buchhandlung, 1873, pp. 24-25.

²⁴ Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, Vol. II, cit., p. 17.

the teaching of reading, writing, counting and religious education. Wider and more profound knowledge would (in their opinion) distance teachers from their simple village environments, while better-educated teachers would also have to be paid more²⁵. One of the consequences of this conservative outlook on teacher training was also that, until the next school law (1869) which improved their status because of the longer training period, teachers lived in truly appalling circumstances.

In Slovenia, one of the obstacles to this concept of teacher training was that there were not enough candidates for teacher training despite the modest entry requirements. The other reason was that there were too few head-teachers who could lecture in pedagogy to students and too few exemplary teachers who could host student teachers. In such circumstances, it was not unusual for schools – even rural schools – to be granted permission to organise teaching courses because of an exemplary teacher who taught there²⁶. With this justification, the Ursulines were most likely granted the right to organise teaching courses and in this way, at the same time, solve the question of training teachers, as co-education was still unheard of in teacher training. However, the right to carry out teaching courses still does not mean institutional independence – this meant only help with exams, which were supervised by an external supervisory organ.

Between 1817 and 1839, in the Ursuline order in Ljubljana, the head-teacher of the monastery school, who was also the school catechist and monastery spiritual teacher, worked as a teacher of pedagogy and didactic. Later, external teachers prepared the candidates for exams²⁷ – most likely from the Ljubljana standard school. In Škofja Loka also, the catechist taught the candidates at their girls' school²⁸.

We can certainly assume that the demanding nature and content of teacher training in the Ursuline monasteries was adapted to the legal demands of male teachers, although the institutionalised training of teachers remained disorganised – and not only here but also in the other Habsburg monarchy states. There, the Ursulines also came furthest in the organisation of teacher training, although we still should not see this as institutional independence, as the exams were still carried out in front of a (male) standard school head-teacher. The first move toward the organisation of independent teacher training took place in 1840 when Emperor Ferdinand I granted the Ursuline convent in Vienna the right to offer a regular «pedagogical course for the training of female teaching individuals»²⁹. This decision, as an annex to the law, also received

²⁵ Engelbrecht, *Geschichte des österreichischen Bildungswesens. Erziehung und Unterricht auf Boden Österreichs*, cit., Vol. III, p. 232.

²⁶ Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, cit., Vol. II, p. 18.

²⁷ Kogoj, *Uršulinke in njihovo vzgojno poslanstvo*, cit., p. 173.

²⁸ Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, cit., Vol. II, p. 169.

²⁹ Gönner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, cit., p. 107.

system-wide confirmation in January 1841 when the course began to operate. Although this issue had now acquired a legal foundation and the need for the training of female teachers had been recognised, few Ursuline training courses became independent following this model: Gönner mentions that this only occurred with the Klagenfurt Ursulines in 1851 and the Ursulines in Salzburg in 1865. The striving of the Ursulines for independence in Linz was successful as late as 1871, when a new school law allowed for the organisation of (private) female teacher training colleges³⁰.

We should also highlight the fact that while the organisation of male teacher training was from the very beginning included in the institutional form of training that was founded and regulated by the state, secular authorities (courses in standard and main schools), the training of female teachers was from the beginning left mainly to private initiatives, convents, which catered for the schooling of girls. Also after the state began to legally regulate this field, the training of female teachers remained in the domain of nuns, or secular teachers who trained themselves and were granted permission to teach on the passing of the relevant exam. Clearly, the state had also fallen victim to the stereotype (present in various social classes) that women were not suitable for public work, such as teaching. In this sense, the private training of female teachers in convents played an important role in overcoming this stereotype and the emancipation of women, although this was not their primary aim. The private and state initiatives in this field had a markedly social background: female convents had taken care of the training of their own teaching wards because the state had not. However, the revolutionary events of 1848 and the law that from then on regulated private schooling demonstrated the altered position of the Catholic Church. This is also reflected in *why* they felt the need to establish their own educational colleges; instead of social reasons, ideological reasons began to come to the fore.

The year of revolution 1848 and the legal regulation of private 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*³¹. This was

³⁰ *Ibid.*, p. 109. The first secular teaching courses were organised in Slovenia in 1861 in Idrija, where the teachers of the main school there educated 6 undergraduates free of charge and provided them the possibility of practice in teaching children. They also took their exams in the presence of the Bishop's school official. See T. Hojan, *Vzgoja učiteljic* [The Education of Teachers], in *Zbornik za historiju školstva i prosvjete*, Hrvatski školski muzej u Zagrebu *et al.*, Zagreb, 1969-1970, p. 126 (in Slovene).

³¹ Entwurf der Grützge des öffentlichen Unterrichtswesen in Oesterreich (1848) – reproduced

somehow a summary of all the reform plans that the newly founded Ministry of Learning and Worship planned to implement. The ministry replaced the previous Court Commission on 23 March 1848³². 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, lessons in the mother tongue, broader content of classes and a more comprehensive system of teacher training. The draft also outlined a thorough reform of secondary schools, which included classical and non-classical high schools, town schools and various professional schools. Among other things, the law brought the change that non-classical and town schools (as well as classical high schools) became comprehensive. The draft in general guaranteed classical high schools improved chances of development, as they could offer subject teaching at higher levels and make higher demands in terms of their teachers³³. Mostly, the draft offered a new definition of the relationship between church and schooling: although the church would rather still have had responsibility for the teaching of religious education and the catechist or priest a decisive role in the running of individual schools, the church supervision of schooling, as defined by the *Political School Constitution* would now be replaced by the secular supervision of selected schoolmasters and elected representatives of the people.

The revolutionary ideas suggested by the draft were not realised in the area of primary school education – the *Political School Constitution* remained in force and the influence of the church on primary school grew even stronger with the enforcement of absolutism, reaching a pinnacle with the acceptance of the concordat of 1855. The situation was different in secondary schools. On the basis of guidelines included in *The Draft of Founding Principles of Public Schooling*, the minister Leo Thun-Hohenstein published *The Organisational Draft on Classical and Non-Classical High Schools in Austria* («Entwurf der Organisation der Gymnasien und Realschulen in Oesterreich») in 1849, written by Franz Exner and Herman Bonitz³⁴.

The liberalism that was influencing the reform of the school system was also reflected in the new and changed relationship to private initiatives in the area of schooling. The modern concept of private schooling originates from the so-called *Bestowed March Constitution* from March 4th 1849 and the simultaneously legalised *Emperor's Patent*, which was enacted in German-

in H. Engelbrecht, *Geschichte des österreichischen Bildungswesens. Erziehung und Unterricht auf Boden Österreichs*, 5 vols., *Von 1848 bis zum Ende der Monarchie*, Wien, Österreichischer Bundesverlag, 1986, Vol. IV, pp. 517-520.

³² Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, Vol. II, cit., p. 7.

³³ *Ibid.*, pp. 8-16.

³⁴ J. Scheipl, H. Seel, *Die Entwicklung des österreichischen Schulwesens von 1750-1938*, Graz, Leykam Verlag, p. 46.

Slavic countries of the Empire³⁵ and therefore in a large section of present-day Slovenia. The third article of this law states that every citizen has the right, if they are able to prove their competence, to found an educational establishment and teach within that institution. The 13th article was assigned to the ministry in order to guarantee the temporary provisions that would allow this, until this area was permanently legally regulated. It was to these regulations that Minister Thun (1850) appealed in his explanation and justification of the *Provisional Law on Private Schooling*³⁶ which was brought into law on 17 June 1850. The law was thought of as a temporary measure, but in Slovenia it endured until the break-up of the Austro-Hungarian monarchy in 1918 and in Austria until the 1960s³⁷.

In regards to the harmonisation of private schooling with the above mentioned constitutional provisions, Thun set out three principles:

- that the education of the young should not be entirely the responsibility of the state, but at the same time not placed in private hands;
- that all private schools, whether or not they are founded by communities/corporations/, faith or secular, remain under state control and
- that decisions as to the validity of qualifications be left to the state, who must set the appropriate conditions³⁸.

The *Provisional Law on Private Education*³⁹ stated in the first article that in the future non-classical and classical high school courses could be taught in private schools. In actual fact, the law regulated the wider areas of private education at secondary and higher level, as the 19th article allowed for the establishment of private schools for drawing, music, handwriting and similar courses – it makes sense to categorise this group of schools within the legal regulations referring to classical and non-classical high schools. Higher primary schools were not covered by this law. Thun, in connection to his expose, wrote that the formulation of a law on private education at the higher primary level would require so much preparation and bring so many difficulties that the work could not yet be concluded⁴⁰. However, even after the law was passed, the

³⁵ B. Klein, *Privatschulen im kanonistischen Kontext – eine staatskirchenrechtliche Bestandsaufnahme*, Linz, Universitätsverlag Rudolf Trauner, 1996, p. 60.

³⁶ *Provisorisches Gesetz über den Privatunterricht*, «Allgemeines Reichs-Gesetz- und Regierungsblatt für das Kaiserthum Oesterreich», n. 309, 27.6.1850. The law is reproduced in Engelbrecht, *Geschichte des österreichischen Bildungswesens. Erziehung und Unterricht auf Boden Österreich*, cit., Vol. IV, pp. 535-537.

³⁷ Klein, *Privatschulen im kanonistischen Kontext – eine staatskirchenrechtliche Bestandsaufnahme*, cit., p. 60.

³⁸ L. Thun, Grafen von, *Allerunterthänigster Vortrag des treuehorsamen Ministers des Cultus und Unterrichts Leo Grafen von Thun, betreffend provisorische Gesetz über den Privatunterricht*, «Vierunddreißigstes Beilage-Heft zum allgemeinen Reichs-Gesetz- und Regierungsblatt für das Kaiserthum Oesterreich», Supplement to edition, n. 309, pp. 200-201.

³⁹ Summarised according to *Provisorisches Gesetz über den Privatunterricht*, cit.

⁴⁰ Thun, Grafen von, *Allerunterthänigster Vortrag des treuehorsamen Ministers des Cultus*

work was not completed as quickly as Thun had expected. Private education at primary school level and in the field of teacher training, which were systemically connected, was only legally regulated by the third Austrian law on primary schooling in 1869. Until then, this field was governed by the 20th, last article, of the *Provisional Law*, which states that regarding private education, as far as higher primaries are concerned, the regulations remain valid, except that it is no longer necessary for private teachers to demonstrate their competence⁴¹. In this way, the regulation of private education in the field of teacher training remained for the time being as set out in the *Political School Constitution*.

The 1855 Concordat

The Draft of Founding Principles of Public Schooling in Austria was an official document issued by the schools ministry which very clearly ordered the diminishing of the role of the church in education. This served to galvanise the Catholic Church to doggedly pursue the consolidation of its influence in this area⁴². The rise of liberalism, foreseen by the revolutionary year of 1848, was brought to a halt for the next two decades by the reaction and increasing dominance of conservative politics. In this way, the authorities secured the express support of the church.

Despite the opposition to it, school reform continued and in the area of university and secondary school education was brought to a conclusion and enforced throughout the territory of the monarchy. The situation in primary schooling was different – with the signing of the concordat – the contract that was agreed by Franz Joseph I. and Pope Pius IX – the less than satisfactory state of this educational sector was further consolidated. As Schmidt emphasises, at that time, we «for the first and last time got from the government a recognised faith school»⁴³; while the supervisory role of the church also changed. If according to the articles of the Political School Constitution, Catholic priests had the right and duty to supervise schools as representatives of the state, with the concordat the highest authority within schools became the Catholic Church⁴⁴.

This of course meant that public schools were faith schools – private confessional schools did exist, however the Catholic Church had no need to

und Unterrichts Leo Grafen von Thun, betreffend provisorische Gesetz über den Privatunterricht, cit., p. 202.

⁴¹ *Provisorisches Gesetz über den Privatunterricht*, cit.

⁴² Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem*, cit., Vol. II, p. 18.

⁴³ *Ibid.*, p. 33.

⁴⁴ *Ibid.*, p. 34.

found its own private schools. The fifth article of the concordat⁴⁵ states that: «The entire schooling of Catholic youth will be, in all public and non-public schools (*nicht öffentlichen*), in accordance with the teachings of the Catholic religion».

There is no mention of private schools in the concordat, rather public and non-public schools. It is clear that this formulation encompasses all schools; private and state in this sense and of course schools with public accreditation and those without, which means that with this concordat the Catholic Church gained the right of control over Evangelical and Jewish schools⁴⁶. In such circumstances, neither the state nor the church had the need to change anything in the field of teacher training – the final exam at the end of the teaching course (*preparandium*) in standard and main schools still took place in the presence of the diocese school inspector.

Resistance to the concordat and the finally establishment of legal regulations governing private education in Austro-Hungary

The concordat was from the very beginning subject to severe criticism from the liberal camp. The so-called Protestant Patent⁴⁷ law from 1861 can be seen as a reflection of these criticisms and the opposition towards the complete dominance of the Catholic Church⁴⁸. This law freed Evangelical schools from Catholic control. In the following years, there was an intense struggle for a change in the law – the political obstacles were overcome in 1867, when the newly elected national assembly gained a significant liberal majority. The first product of the political dominance of the liberals was the so-called *December Constitution*⁴⁹ in 1867, which comprises 5 fundamental state laws. Among them, the most important was undoubtedly the *Founding State Law on the General Rights of Citizens*⁵⁰, which is still in effect in Austria today⁵¹. The 17th article was key to the further development of private schooling, which granted every citizen the right to found a school and teach in it (with the appropriate

⁴⁵ The articles of the concordat from 1855 concerning schooling are reproduced in Engelbrecht, *Geschichte des österreichischen Bildungswesens. Erziehung und Unterricht auf Boden Österreich*, cit., Vol. IV, pp. 544-546 under the title *Aus dem Konkordat zwischen Franz Joseph I. und Papst Pius IX* (1855).

⁴⁶ Klein, *Privatschulen im kanonistischen Kontext – eine staatskirchenrechtliche Bestandsaufnahme*, cit., p. 74.

⁴⁷ *Das Protestantenpatent vom 8. April 1861*.

⁴⁸ *Ibid.*, p. 80.

⁴⁹ *Die Dezemberverfassung 1867*.

⁵⁰ *Das Staatsgrundgesetz über die allgemeinen Rechte der Staatsbürger*.

⁵¹ *Ibid.*, p. 84.

education). As Klein⁵² emphasises, on the level of fundamental law, the right to establish private schools of all types and levels (under state supervision) was granted in law for the first time. Limits to home teaching continued to apply (as in the 1850 *Provisional Law*). With this, the Catholic Church was placed in the same position as all other faiths.

The following law from the block of liberal school legislation of the time was the *Law on the Principle Provisions on the Relationship Between Schools and the Church*⁵³ from 25th May 1868, which finally tore apart the tight bond between the Catholic Church and schooling. All that remained of the previous unity between state and church in the field of education was the right of the church to the founding of confessional schools, the teaching of religious education and (instead of domination in school control) the participation of priests in school supervision, which finally became the responsibility of the state⁵⁴.

Of course, the Catholic Church resisted strongly; however, there was no way back – the only possibility that remained (just as with churches of other faiths) was the founding of their own private schools at the second level in accordance with the *Provisional Law on Private Education* from 1850⁵⁵. The status of general education schools and primary and lower secondary levels was finally settled by the *State Law on Primary Education*⁵⁶ (from here on in SLPE) from 1869⁵⁷.

Teacher training within the 3rd Austrian law on primary schooling

This was a modern law – in the field of primary school education and teacher training, it brought into law the demands that had not been implemented after the year of revolution 1848 because of the reaction and opposition of

⁵² *Ibid.*

⁵³ *Das Gesetz, wodurch grundsätzliche Bestimmungen über das Verhältnis der Schule zur Kirche erlassen werden.*

⁵⁴ *Ibid.*, p. 89.

⁵⁵ E. Protner, *Razvoj zakonskega urejanja zasebnega šolstva v obdobju habsburške monarhije in Austro-Ogrske* [Development of Private Education Regulation in the Period of Habsburg Monarchy and Austria-Hungary], in M. Šimenc, V. Tašner (edd.), *Zasebno šolstvo v Sloveniji* [Private Education in Slovenia], Ljubljana, Pedagoški inštitut, p. 26 (in Slovene).

⁵⁶ *Das Reichsvolksschulgesetz* 1869.

⁵⁷ Based on: *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 Schulbücher-Verlag, 1906, pp. 3-24.*

the Catholic Church. The law abolished the categorisation of primary schools into rural, main schools and standard schools – and instead introduced (with the first four years unified) compulsory eight-year primary school. With this law, schools were split into state and county institutions, and teachers became county employees. Secular school supervision was legalised and with this, the dependence of teachers on the priesthood was brought to an end. An even more significant shift was brought about by this law in terms of teacher training – it demanded the establishment of gender separated teacher training colleges, an act which saw the training of female teachers become formally equivalent to that of male teachers. In actual fact, this was also a huge shift in the change of social status of many girls who decided on such an education, as the career of teacher was the only intellectual profession that allowed women the possibility of economic independence⁵⁸.

In comparison to the previous one year or two year courses that took place in standard or main schools, the teacher training institutes were independent bodies. Every teacher training institute had to have a so-called practice school and model primary school, where observation classes took place and the teaching candidates taught practice classes. In essence, the quality of these courses improved, they became more difficult and the academic standards, which corresponded to the most up-to-date pedagogical concepts of the time, also rose⁵⁹.

With the SLPE the difference between public and private schooling that still exists today came into being. The second article defined a «public institution» as all those primary schools that were supported by the state (either entirely or partially), county or local authority, and accessible to all regardless of faith. The establishing and maintaining of rural schools was radically altered by this law on private schools – their operation was regulated by an independent chapter (from the 68th to the 73th article) and in this framework, particular attention is paid to private teacher training colleges that were not included in the older *Provisional Law*, as they (in the form legalised by the SLPE) did not yet exist.

SLPE allowed for the establishment of private (male and female) teacher training colleges on the condition that the schools minister validated the statute and curriculum, while the director or teacher at the private institution had to demonstrate the appropriate level of competence. Even this did not suffice for the right to grant accredited leaving certificates – this right could only be granted to a private institution by the minister on the condition that the curriculum did not differ significantly from the curriculum offered by public institutions and

⁵⁸ V. Schmidt, *Zgodovina šolstva in pedagogike na Slovenskem* [The History of Schooling and Pedagogy in Slovenia], 3 vols., Ljubljana, Delavska enotnost, 1988, Vol. III, pp. 245-246 (in Slovene).

⁵⁹ See E. Protner, *Pädagogischer Takt und Lehrerpersönlichkeit in herbartianischen Konzepten der Lehrerbildung*, in R. Coriand (ed.), *Herbartianische Konzepte der Lehrerbildung: Geschichte oder Herausforderung?*, Bad Heilbrunn, Julius Klinkhardt, 2012, pp. 205-223.

if the private body had the agreement of the regional school authority for the employment of the director and teachers. In addition, the final exam had to be taken under the supervision of the inspector, who had to consent to the granting of the leaving certificate. How consistent the authorities were in ensuring that the private institutions worked to the same standards as state bodies can also be seen in the fact that after the decree of 1896, the minister was only allowed to grant this right after the first generation of graduates demonstrated their competence⁶⁰.

Similar restrictions and conditions to those placed on private teacher training colleges by SLPE were prescribed for private schools open to school-age children, but one extra condition was set – that the director and teachers had to be morally unimpeachable. The 71st article follows on in logic from these provisions; it states that private schools belong under state control and that the director of such schools is answerable to the authorities for the legality of their operation. The formulation of the 72nd article is interesting, stating that if a private school meets the needs of a regional authority, then the authority is excused from the need to establish a new school. This goes to prove that the school authorities were not opposed to private schools, they merely forced them to adapt to the programme and standard of state schools.

The church protested vociferously against the new legal regulations⁶¹. Also, when toward the end of the 19th century liberalism lost its leading political role and the Catholic Church strengthened its influence with the help of the Social-Christian movement, the situation in the area of private school legal regulation did not change. The dissatisfaction of the church with its influence within the private school system led to the formation of a new logic in the establishment of private schools – a logic that was founded on global rather than social principles. This was strengthened in the 1880s when the influence of society began to encroach on school politics. In all the Austro-Hungarian states, there was an obvious struggle between the free-thinking liberal nature of society and the opposing clerical groups. At the end of the 19th century, in Slovenia, the professional teaching organisation (Slovenian Association of Teachers) adopted a liberal stance and by doing so, brought to an end the unity that had existed until then. Catholic-oriented teaching staff were in the minority, which led them to found their own teaching association (*Slomšek Society*)⁶². In Austria,

⁶⁰ Klein, *Privatschulen im kanonistischen Kontext – eine staatskirchenrechtliche Bestandsaufnahme*, cit., p. 102.

⁶¹ 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, p. 27 (in Slovene).

⁶² See 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, 2001, pp. 329-339.

the clerically-oriented Catholic School Association (*Katolische Schulverein*) stood opposed to the liberal German-Austrian Teaching Association. The former's main aim was to obtain Catholic schools for Catholic children and the establishment of Catholic secondary schools and teacher training colleges. According to Engelbrecht's⁶³, the relatively modest body of private schools run by a small number of orders began to rapidly rise. In the same way, the *Slomšek Society* fought to establish private Catholic schools – these demands were set out at the second Catholic assembly, which was also the founding meeting of the *Slomšek Society* in 1900⁶⁴.

Teacher training institutes in Slovenia pre-WWI

Until the state law on primary schooling was passed, teacher training courses in what we know as Slovenia today were provided by the Ljubljana elementary school and main schools in Maribor, Celje, Koper (Capodistria) and Idrija. According to the law, main schools could be opened in all larger towns and squares; there were of course more of them, despite the fact that in the first half of the 19th century these schools did not have qualified staff for the training of teachers, or even enough candidates for this role⁶⁵. We have already mentioned that the Ursulines in Ljubljana and Škofija Loka ran teacher training for women. It is here that the origins of private training colleges can be found, which began to open after the SLPE was enforced. The Ljubljana Ursulines opened a private female teacher training colleges in 1869 and in this way, ensured uninterrupted education for their own teacher trainees. Until 1902, when the teacher training college gained public accreditation, their wards took the *matura* (final school examination) at a state female institution. In Škofija Loka the Ursulines founded a private female teacher training college in 1906, and were granted public accreditation in 1910⁶⁶. In the pre-WWI period, a third private teacher training college for women was founded in Slovenia in accordance with the SLPE – they were opened by Catholic School Sisters, with one institution opened in Maribor in 1892 (gaining public accreditation in 1896)⁶⁷.

⁶³ Engelbrecht, *Geschichte des österreichischen Bildungswesens. Erziehung und Unterricht auf Boden Österreich*, cit., Vol. IV, p. 121.

⁶⁴ 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. 397.

⁶⁵ V. Schmidt, *Učiteljsko izobraževanje na Slovenskem v prvi polovici 19. Stoletja* [Teacher Training in Slovenia in the First Half of the 19th Century], «Sodobna pedagogika», n. 1-2, 1958, p. 4 (in Slovene).

⁶⁶ Kogoj, *Uršulinke na Slovenskem*, cit., pp. 112-114.

⁶⁷ *Kronika matrne hiše šolskih sester v Mariboru*, cit., pp. 608-609.

In order to better understand the existence and position of private teacher training colleges in Slovenia, we must also take into account the state bodies that were founded in accordance with the SLPE. In Ljubljana the male teacher training college began to operate in the 1870/71 academic year, and its female equivalent one year later. In Maribor the state male teacher training college was founded in 1869 and the regional female college in 1902⁶⁸. Among the bodies that were founded in areas with a Slovene population, and which alongside Italian and German also used Slovene, we can count the institution in Trst (Trieste), Gorica (Gorizia), Koper (Capodistria) and Celovec (Klagenfurt). Within today's Slovenian borders, there was also a college in Koper (Capodistria), which was founded in the 1872/73 school year. The language of teaching was Italian, German was a compulsory subject, and Slovene was only for those who wished to obtain a qualification for teaching at Slovene primary schools. Later, the teacher training colleges were reorganised in such a way that they contained Italian, Slovene and Croatian departments. At the request of the Slovenes, the Slovene department moved to Gorica (Gorizia) in 1909. After 1912, the teaching and official language of the male institute became only Slovene – this was the first state secondary school in the Austro-Hungarian monarchy with Slovene as its teaching language⁶⁹.

Regardless of the concrete language policies adopted by individual teacher training colleges, we can state that the institutions also trained teachers for Slovene primary schools and that Slovene was in the weakest position at least as a compulsory subject. According to this criteria, there were more state institutions than private in the pre-WWI period. If we take as our criteria the institutions that operated within the borders of present-day Slovenia (we are not including the college in Koper as a Slovene institution), then the ratio between state and private is almost equal: two male and two female state institutions were in operation (Ljubljana and Maribor) and three private (church) female institutions. This balance was, taking into account the statistics on child enrolment in private schools, markedly disproportionate, as in 1890, 3% of children aged between 6 and 12 attended private schools in the Kranjska region (central Slovenia) and 2.8% of children aged between 12 and 14⁷⁰. This imbalance was still in evidence in the period between the two wars.

⁶⁸ 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], cit., pp. 344-346.

⁶⁹ *Ibid.*, p. 345.

⁷⁰ 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 Štajerska, Koroška, Kranj and Primorska 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. 143.

Teacher training between the two wars

After the break-up of the Austro-Hungarian monarchy, several states came into existence on the territory it had covered – Slovenia became part of the Kingdom of Serbs, Croats and Slovenes, which was known from 1929 onwards as the Kingdom of Yugoslavia. While Austria maintained continuity in the development of private schooling and the requirements contained in the *Provisional Law on Private Schooling* and the SLPE remained in place until the great reforms of 1962⁷¹, the legal regulations on private schooling in the new state set out on a path that was not favourably inclined to private schooling. On Slovene territory, until 1929, when thorough reform of school legislation took place, the old Austrian laws remained in place⁷²; however, the constitution accepted on 28 June 1921, which was the only common legal framework relating to schooling on the Kingdom's territory, demonstrated a rather different attitude to private schooling. The 16th article, which defined the basic foundations for the entire school system, expressly emphasised the state's attitude and control over schooling. The constitution did actually allow for the possibility of establishing private schools, although a separate law was supposed to govern this area⁷³.

The independent law on private schooling in the first Yugoslavia was never issued; however, all three school laws (*Law on National Schools*, *Law on Teacher Training Colleges* and *Law on Secondary Schools*), which were issued as late as 1929, were uniform in the provision that the existing private schools could remain open if they adapted to the regulations, while the establishment of new private schools was banned⁷⁴. In the second article of the *Law on Teacher Training Colleges*⁷⁵, it clearly states that teacher training was the domain of the state and that no private institutes should be established. This categorical ban was softened slightly by the 88th article, which stated that private institutions that existed on the day the law was enforced could continue to operate if they, within a 4 month period, met the requirements contained in the law and that the teachers were approved by the schools minister.

The law on teacher training unified the education of teachers in the Kingdom of Yugoslavia at the higher secondary level, which was a disappointment to those

⁷¹ See Klein, *Privatschulen im kanonistischen Kontext – eine staatskirchenrechtliche Bestandsaufnahme*, cit.

⁷² V. Ciperele, A. Vovko, *Šolstvo na Slovenskem skozi stoletja* [Schooling in Slovenia Through the Centuries], Ljubljana, Slovenski šolski muzej, 1987, p. 71 (in Slovene).

⁷³ *Ustav Kraljevine Srba, Hrvata i Slovenca* [The Constitution of the Kingdom of Serbs, Croats and Slovenes], Zagreb, Naklada Ćirilo-Metodske nakladne knjižare, 1921 (in Serbocroatian).

⁷⁴ E. Protner, *General education private schools in Slovenia from the past to the present*, «Journal of Contemporary Educational Studies», vol. 61, n. 5, 2010, pp. 60-80.

⁷⁵ *Zakon o učiteljiščih* [Law on Teacher Training Institutions], Tiskovna zadruga, Ljubljana, 1930 (in Slovene).

who had fought for the raising of standards in teacher training to pedagogical academy level or even faculty level⁷⁶. The only essential gain in comparison to the previous arrangement was that teacher training was extended to one year.

Educational laws therefore banned the establishment of private schools – although, all three previously mentioned private female teacher training colleges continued to operate. Both of the male state colleges and female colleges in Ljubljana and Maribor mentioned above also remained open. When the state decree of 1932 demanded the merging of the male and female state colleges into one body, something unusual occurred: until 1941 in Slovenia, when the war broke out here, there had been more private than state institutions. The three private female colleges continued to operate; instead of the four previous (two male, two female), there were two mixed state institutions⁷⁷. What we have to take into account here is that in the 1939/40 school year, in both state institutions, there were 430 pupils, while in all three private institutions, there were only 153 pupils⁷⁸, which is a 26,2% share overall. For sake of comparison, we can say that at that time in 14 state (and 2 town) classical high schools, there were 12,244 pupils; at one of the two private (Catholic) classical high schools there were 766 pupils, which is a 5,9% share⁷⁹. At 858 primary schools at the time there were 177,549 children; at 18 private schools there were 2976 pupils⁸⁰, which accounts for 1,6%.

This clear imbalance between the number of children who were educated at private (Catholic) schools and the number of teachers who received their education at private teacher training colleges demonstrates how doggedly the Catholic Church fought for religiously educated teachers in order to ensure a stronger presence for the Catholic faith in schools when its influence had been limited by the Austrian SLPE and the later 1929 Yugoslav educational legislation.

⁷⁶ E. Protner, Z. Medveš, S. Batinič, S. Miovska-Spaseva, I. Radeka, V. Spasenović, S. Šušnjara, V. Zorić, N. Vujisić-Živković, *The Development of Teacher Training in States of Former Yugoslavia*, in A. Nemeth, E. Skiera (edd.), *Lehrerbildung in Europa*, Frankfurt am Main [etc.], Peter Lang, 2012, pp. 237-265.

⁷⁷ *Stalež šolstva in učiteljstva ter prosvetnih in kulturnih ustanov v Dravski banovini* [The State of Schooling, Teaching Staff, Secular and Cultural Institutions in the Drava Provinces], Ljubljana, Banovinska zaloga šolskih knjig in učil v Ljubljani, 1934, pp. 31-33 (in Slovene). For the sake of comparison, the balance between public and private teacher training institutions was similar in Austria. In 1937, there were 14 state teacher training institutions (6 male, 5 mixed and 3 female) and 14 private (3 male and 11 female). J. Schmidt, *Entwicklung der katholischen Schule in Österreich*, Wien, Herder & Co., 1958, pp. 176-177.

⁷⁸ *Statistični pregled šolstva in prosvete v dravski banovini za šolsko leto 1939/40* [A Statistical Overview of Schooling and Teaching in the Drava Provinces in the Academic Year 1939/40], Ljubljana, Banovinska zaloga šolskih knjig in učil v Ljubljani, 1940, p. 45 (in Slovene).

⁷⁹ *Ibid.*

⁸⁰ *Ibid.*, p. 22.

The position of teacher training institutes during and after WWII

At the start of WWII, Slovenia was divided among three occupiers: the Germans, Italians and Hungarians. In German occupied territory, Slovene schools were withdrawn and replaced with German ones. Church property⁸¹ was also confiscated, which prevented the Ursulines in Škofija Loka⁸² and the School Sisters in Maribor⁸³ from operating their private teacher training colleges. The position of nuns in the Ljubljana area was different, as they were under Italian control. Slovene schools remained open, as did the private teacher training run by the Ursulines. The teacher training institute remained in operation after the Italian surrender, which was then taken over by the Germans⁸⁴ after the Italian troops had withdrawn. Regardless, we can conclude that the period of German occupation and enforcement of National-Socialist legislation, was a time in which the operation and establishment of private schools was entirely impossible⁸⁵, in other words, the most difficult period in their development.

The period after WWII was also less than favourable to private schooling. With liberation in Slovenia came a new social order. The predominant Marxist world-view ideology was not disposed to religion, indeed the new regime's attitude to the Church can be seen in the accusation that they had taken the occupier's side during the war and supported collaboration⁸⁶. The new authority, which saw education and schooling as the sole domain of the state, in various ways – one of them being the nationalisation of monastery property – rendered the educational work of nuns impossible. The Ursulines in Škofija Loka and the School Sisters in Maribor were unable to continue their work after the war; the Ursulines in Ljubljana continued their educational mission after the end of the war in May 1945, but their property was nationalised the same year. The school minister did promise the Ursulines that they would be given teaching work as state employees, but they all lost their jobs in March 1946⁸⁷. Private schools

⁸¹ T. Ferenc, *Okupacijski sistemi na Slovenskem 1941-1945* [Occupying Systems in Slovenia 1941-1945], Ljubljana, Modrijan, 1997, p. 16 (in Slovene).

⁸² T. Hojan, *Uršulinske šole od prihoda do leta 1945* [Ursuline Schools from Their Arrival to 1945], in M.J. Kogoj (ed.), *Tristo let ljubljanskih uršulink* [300 Years of the Ljubljana Ursulines], Ljubljana, Družina, 2002, p. 171 (in Slovene).

⁸³ *Kronika materne hiše šolskih sester v Mariboru*, cit., pp. 679-681.

⁸⁴ Hojan, *Uršulinske šole od prihoda do leta 1945*, cit., p. 171.

⁸⁵ Klein, *Privatschulen im kanonistischen Kontext – eine staatskirchenrechtliche Bestandsaufnahme*, cit., pp. 182-183.

⁸⁶ A. Gabrič, *Sledi šolskega razvoja na Slovenskem* [Traces of School Development in Slovenia], Ljubljana, Pedagoški inštitut, Digitalna knjižnica, 2009, p. 151, <<http://www.pei.si/Sifranti/StaticPage.aspx?id=71>> (last access: October 25th, 2012) (in Slovene).

⁸⁷ B. Kolar, *Uršulinke in njihove ustanove v času totalitarnih družbenih razmer na Slovenskem* [Ursulines and Their Institutions Under Totalitarianism in Slovenia], in Kogoj (ed.), *Tristo let ljubljanskih uršulink*, cit., p. 125.

and their operation was finally brought to a complete halt on Slovenian land by the Ministry Decree on the Education of Teachers in the 1945/46 School Year, issued 3rd September 1945, which states in the first article that:

All private teacher training is henceforth halted. Students of such institutions have the right to enroll in the appropriate class of state teacher training college⁸⁸.

Until 1953, private schools were banned entirely from Slovenia. That year the Yugoslav assembly accepted the Law on the Legal Position of Religious Communities, which allowed for the founding of confessional schools – on this basis the Catholic Church in Slovenia opened two private classical highs – although their status was not the same as confessional schools during the first Yugoslav or Austro-Hungarian periods, as the schools did not have the right to grant accredited school-leaving certificates. A greater shift took place in 1991, when the professional council for education and schooling confirmed the harmonisation of their programmes with the state classical high programme, and the parliament passed a law that stated, among other things, that the leaving certificates of both schools from the acceptance of the law onwards would be considered publically valid documents. In this way, Slovenia had two private schools before independence and the change in political system⁸⁹. A completely new, modern legal status was granted to private schooling only after independence and the introduction of parliamentary democracy at the end of 1991. The school legislation of 1996, almost 150 years after a similar legal position that brought private schooling to Slovenia for the first time, once again allowed for the legal establishment of private schools.

Conclusion

While in Slovenia, the new school legislation provided for the establishment of private schools, the private training of teachers is, however, a thing of the past. There are three private primary schools registered in Slovenia today: one Waldorf; one Montessori; one Catholic and six private classical high schools (four of those are Catholic; one Waldorf; one non-faith). According to Slovene educational legislation, teachers at all levels of the school system must have completed an MA (equivalent to 300 ECTS) – for the private tradition of teacher training to continue, it would have to take place at a private faculty or university. While some private faculties are operating in Slovenia, they do

⁸⁸ *Uredba ministrstva za prosveto o učiteljiščih v šolskem letu 1945/46* [Ministerial Decree for Education on Teacher Training in the School Year 1945/46], Ur. l. SNOS in NVS, 8.9.1945, No. 33, p. 143 (in Slovene).

⁸⁹ See Protner, *General education private schools in Slovenia from the past to the present*, cit.

not offer pedagogical programmes. Logically, for this tradition to continue, the Catholic Church would have to show much more interest in carrying it on. In actual fact, the Slovenian Assembly of Bishops founded the Catholic Institute and through that, the Faculty of Business Studies, the first faculty of the Catholic University⁹⁰ which is currently being established. Within this type of university, it is of course possible to imagine teacher training programmes; however, in all likelihood, this will not happen in the near future. Of course, questions arise as to the sense of opening such programmes, as the number of private Catholic schools will probably not rise in the future, and the educational doctrine of public schools in accordance with the autonomy afforded to the school sphere recognises the right of teachers to their own religious and political persuasion, although they must not force their views on children.

The tradition of private teacher training development in Slovenia therefore remains part of our history. If we attempt to assess the meaning and value of this education then we must mainly focus on the fact that such education was useful in the emancipation of women, as it allowed them career freedom at a time when there were no other intellectual careers from which they could make a living. When the state later began to found teacher training institutes for women, the Catholic bodies played a significant role in ensuring that the range of schools available was pluralistic from the perspective of differing world-views – the relationship between private and public teacher training institutes points to an imbalance in favour of private institutes. We should also highlight a feature that has not been analysed in detail in the paper: in private Catholic teacher training institutes the language of teaching was generally Slovene, while in state institutions, the language was, until the break-up of the Austro-Hungarian monarchy, mostly German (for Slovene pupils also). The nuns contributed greatly to the preservation and development of the Slovene national consciousness with such a language policy.

⁹⁰ *About the Faculty*, <<http://www.katoliski-institut.si/en/fbs/about>> (last access: November 25th, 2012).

The development and prospects of teacher education in Croatia

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ABSTRACT: The beginnings of organized teacher training in Croatia are associated with the introduction of state school legislation during the Habsburg Monarchy in the 1770s. Until the mid-19th century teachers were educated using the normal school/pedagogical courses within normal and major schools as well as small gymnasiums. With the establishing of a two-year Teacher Training Course in Zagreb (1849), which is the first State Teachers College, the process of an institutional education of teachers in Croatia begins. From the mid-19th century up to 1918 the teacher education in the Kingdoms of Croatia and Slavonia, as constituents of the Hungarian part of the Monarchy, was regulated in terms of an autonomous school law from 1874 and 1888. In Dalmatia and Istria, together with the Military Frontier until the annexation to the civic Croatia as components of the Austrian part of the monarchy, the education of teachers was regulated by provincial school protocols, pursuant to the Austrian school law from 1869. The dominance of Herbart's pedagogical heritage could not influence the flow of the educational reform of the European *fin de siècle*. A pedagogical twist, in the form of a *didactic-methodological renewal* based on the principles of mobility of a working school, occurred between two world wars. Teacher education is mostly influenced by the forming of the Higher Pedagogic School in Zagreb (1919), which provided the option of continuing one's education after completing normal schools. During the 1960/1961 school year, the last generation of students enrolled in the five-years long teacher high school program. The gates to the long desired academic community were now open to teachers by the introduction of a two-year long study program, defined by the *Pedagogic Academy Law* (1960). A four-year classroom teachers study program was introduced in Croatia in 1992. From the academic year 2005-2006, with the reform of higher education in accordance with the Bologna process in Croatia, a five-year long teacher education study program was being introduced within the integrated undergraduate and graduate teachers' education program, together with the opportunity for a scientific postgraduate education. The recent development of modern society, the focus on training, but also of the initial education of teachers, is now increasingly being transferred from specialized educational institutions to

the different methods of formal, non-formal and informal approaches to learning within the modern society of knowledge, in which the teacher is an active co-creator of his or her own education. The focus is now re-directed from the control of the education process i.e. teacher training to the measurement of learning outcomes and competencies that a teacher has, regardless of the process of their acquisition.

EET/TEE KEYWORDS: Teacher Education; Teacher Centre; History of Education; Educational Legislation; Education System; Croatia; XVIII-XX Centuries.

The following work provides an overview of the development of organized training and institutional education of teachers in Croatia¹ with special emphasis on recent changes within the subject field. The text also focuses on pedagogical education and the possibilities of teacher education with regards to the current situation and prospects for further development. The pedagogical component is an indispensable part of teacher² education and it has played an important role throughout history in their professional self-realization. Teachers played a key role in the development of pedagogy as an academic discipline.

The development of teacher education, as well as the educational system in general, is a continuous process influenced by historical heritage and social, political and educational conditions of a specific period. Territorial disunity together with the administrative affiliation of Croatian lands to various national communities throughout the country's history had the effect of non-uniform and uneven development of education. This paper covers the period from the second half of the 18th century to the beginnings of the 21st century, during which teacher education in Croatia went through an evolutionary journey from the normal school courses and two-year teacher schools to five years long university studies. During this period Croatian lands were almost continuously under the rule of Habsburg or Austro-Hungarian Empire³. In the period between the two world wars a segment of Croatian lands became part of the new national community – the Kingdom of Serbs, Croats and Slovenes (from 1929 known as the Kingdom of Yugoslavia), with the exception of Istria, Rijeka, Zadar, and the islands of Cres, Lošinj, Palagruža, and Lastovo which belonged

¹ This part of the article partially refers to the book *Teachers in Croatia 1849-2009* by Š. Batinić, S. Gačina Škalamera, Zagreb, Croatian School Museum, 2009.

² The term *teacher* in this paper is used in the sense of *primary teachers*. This is the largest subgroup of teachers who teach students during the first four years of primary and compulsory school. Each teacher takes a group of students, i.e. one class, from the beginning of their schooling in the first grade and coordinates them to the end of fourth grade by teaching them most subjects and caring for their systematic education.

³ Dalmatia and Istria were provinces of the Venetian Republic until 1797, when they became part of the Habsburg Monarchy. From 1808 until 1815 they were under the French rule, and then again returned to Austria, along with Dubrovnik, which was an independent republic before the French administration.

to Italy. Later on, from 1941 until early 1945, the Independent Croatian State was established, but without Istria, part of Dalmatia and most of the islands that remained under the rule of Italy, as well as without Međimurje controlled by Hungary. From 1945 Croatia was part of socialist Yugoslavia⁴, and from 1991 an independent state.

The beginnings of organized training and institutional education of teachers

With the development of a state public education, a need for an organized training of teachers emerges. These processes within Croatian lands were associated with the beginnings of state school legislation in the Habsburg Monarchy during the 18th century. With the implementation of the *General School Order*⁵ (1774) and the school system *Ratio educationis* (1777)⁶ requirements were set regarding the training and duties of common teachers. Within *normal* or *main* schools, which were established in all provinces as exemplary schools, educational courses for teachers were organized. Teacher candidates had to acquire the necessary knowledge and skills in order to properly perform the duties of *honest* teachers. These consisted of knowledge of the subjects to be taught in school, knowledge of methods, practical teaching training, upholding of school discipline, keeping the catalog and receiving school inspections⁷. The most important source of all necessary knowledge for future teachers was Johann Ignaz Felbiger's methodological manual called *Methodenbuch für Lehrer der deutschen Schulen in den kaiserlich-königlichen Erbländern* (1775), the «book of books», which collected all the knowledge

⁴ The history of teacher education in all constituting countries of the Kingdom of Serbs, Croats and Slovenes (Kingdom of Yugoslavia) and later the Federal National Republic of Yugoslavia (which from 1963 until its collapse in 1991 was called the Socialist Federal Republic of Yugoslavia), was published in the work of E. Protner, Z. Medveš, Š. Batinić, S. Miovska Spaseva, I. Radeka, V. Spasenović, S. Šušnjara, V. Zorić, N. Vujisić Živković, entitled *The Development of Teacher Training in the States of Former Yugoslavia*, within the proceedings of *Lehrerbildung in Europe. Geschichte, Struktur und Reform*, Frankfurt am Main [etc.], Peter Lang, 2012, pp. 239-265.

⁵ *Allgemeine Schulordnung für die deutschen Normal-, Haupt- und Trivialschulen in sämtlichen k.k. Erbländern*, [Wien, 1774]. The *General School Order* was an important milestone in the development of education in all countries of the Habsburg Monarchy, although indirectly valid only for the Austrian and Czech Hereditary country, and for Croatian lands only for the Military Region. In 1777, following the path of the *Order*, the *Ratio educationis* was released as a fundamental legal document designed for the planning of education in the countries of the Crown of St. Stephen, or more precisely, for the countries in the eastern part of the Monarchy, to which belonged Croatia and Slavonia (cfr. I. Horbec, V. Švoger, *Education as politicum: General School Order from 1774*, «Annals of the History of Education», n. 9, 2010, pp. 5-47).

⁶ *Ratio educationis totiusque rei litterariae per regnum Hungariae et provincias eidem adnexas.*

⁷ *Allgemeine Schulordnung für die deutschen Normal- Haupt- und Trivialschulen in sämtlichen k.k. Erbländern*, cit.

required for the practical work of teachers, principals and school supervisors, and which functioned as canon for all who were involved in the implementation of the school reform⁸.

Croatian teachers were most likely trained using one of the abbreviated edition of the *Methodenbuch* such as *Kern des Methodenbuches, besonders für die Landschulmeister in den k. k. Staaten* (first published in 1777), the *Förderungen an Schulmeister und Lehrer der Trivialschulen...* (1778) or the Pest edition published under the title *Kurzer Leitfaden zur vorgeschriebenen Lehrart besonders für Lehrer auf dem Lande in dem Königreich Ungarn und dessen Kronländern*⁹. The above assumption is based on the fact that there is no printed Croatian translation of the *Methodenbuch* and that the abridged versions were acceptable for teacher candidates, which is evidenced by surviving manuscripts found in bequests of the teachers such as Joseph Herović (*Methodus*, 1797), Ivan Jurišević (*Vpelivanje of podvuchanya decze vu školi*, 1835), and Vjekoslav Premzl (*Czeli navuchanija nachin iliti Methodus razelujesze na 3 strane*, 1835)¹⁰. Comparison confirmed that the first manuscript was a translation of *Methodenbuches Kern des...* (Vienna), while the other two books were translations of *Kurzer Leitfaden...* (Pest). A series of similar methodological manuals appeared in the first half of the 19th century, most notably Joseph Peitl's *Methodenbuch*¹¹, which was used for normal school courses in Croatia, Slavonia, and the Military Region. Its Italian translation (*Metodica di Giuseppe Peitl*), on the other hand, was in use as part of the *methodological courses* in Dalmatia¹².

The Normal School of Vienna was the example that was followed by other major cities of the provinces. In Zagreb, for example, the Main National School was established in 1776, which was attended, along with the regular students, by young men preparing for the teaching profession. Candidates for the teaching profession coming out of the Military Region would travel to Vienna, where they were acquainted with the Felbiger method, and upon return they would pass on their knowledge to future teachers of the Region¹³.

⁸ J.A. Helfert, *Die Gründung der österreichischen Volksschule durch Maria Theresia*, Prag, Verlag von Friedrich Tempsky, 1860.

⁹ There are preserved editions of the book from 1796 and 1806 in the Croatian School Museum in Zagreb which are completely identical in content and scope, with only a small part of the book that differs from *Kern des Methodenbuches*.

¹⁰ The manuscripts are preserved in the Croatian School Museum.

¹¹ *Methodenbuch oder Anleitung zur zweckmäßigen Führung des Lehramtes für Lehrer in Trivial- und Hauptschulen*. Wien, 1820. Until the mid 19th century about ten different editions of this textbook were published.

¹² A. Ströll, *Pučko školstvo u Dalmaciji od godine 1814. do godine 1900*, Zadar, Nagradna tiskarnica Petra Jankovića, 1900, p. 26.

¹³ A. Cuvaj, *Grada za povijest školstva kraljevina Hrvatske i Slavonije od najstarijih vremena do danas*, sv. 1, Zagreb, Naklada Kr. hrv.-slav.-dalm. zem. vlade, Odjela za bogoštovlje i nastavu, 1910, p. 525.

With new school legislation in the early 19th century (*Politische Verfassung der deutschen Volksschule*, 1805, *Ratio educationis*, 1806) there was an attempt to improve education and the position of teachers. However, normal courses at *normal* and *main* schools during the 19th century, as well as in the male general program secondary school, was still the only organized form of education of teachers within the Croatian region. The courses would usually last three, and then six to nine months, finally to reach a time span of two years. An edict – *Systema scholarum elementarum* (*A System of Primary Schools*) – in 1845 defined a two-year teacher-training course at *Internship Institutes*, where the teacher candidates would acquire adequate methodological training¹⁴. It was a step toward the establishment of teacher-training schools as independent institutions.

Teacher education within Croatian regions from 1848 to 1918

During the second half of the 19th century the education of teachers becomes more professionalized and standardized. The practice of training professional teachers through *normal* courses¹⁵ was gradually abolished and replaced by the systematic creation of a network of state schoolteachers. The first such school was opened in Zagreb in 1849. A year earlier, at the monastery of the Sisters of Charity of Zagreb, a Women's Teacher Training College started its activity and was given the right of public access in 1851. The first teacher-training school in Dalmatia that used Croatian language for teaching was established in 1866 in Arbanasi (near Zadar), while a two-year teacher-training course using Italian language – *Corso Biennale de Preparandi Maestri* existed in Zadar since 1852. The two institutions were combined into a single bilingual one in 1870 – the Imperial Royal Male Normal School located in Arbanasi, while from 1879 the teaching language was Croatian. The teacher-training school with the Italian teaching language was active from 1870 until 1873 in Rovinj, from where it was moved to Koper. In Slavonia the first teacher-training school was established in Djakovo in 1857 and was active until 1875, when it ceases to exist along with the female teacher-training school established in 1870 by the Sisters of St. Cross. The center for teacher education for the Military Frontier region became Petrinja, where in 1862 at the Lower General Program Secondary High School a two-year teacher-training course was established, only to be transformed into

¹⁴ *Ibid.*, sv. 3, p. 146.

¹⁵ Since in the beginning there were not enough teachers' schools, the normal courses in the 1850s were still educating a large number of teachers. In terms of duration and taught subjects they were approaching the standards of teacher training schools, but often lacked qualified *normal* teachers and were not 'permanent bureaus', as the new candidates would not enroll each year but according to the needs i.e. when the public competition was announced.

a teacher-training school in 1871. During the 1870s four additional teacher-training schools were established: two Serbian Orthodox schools – Pakrac (1872) and Karlovac (1875), a State Women's Teacher-Training School in Dubrovnik (1875), and the Hungarian Teacher-Training School in Čakovec (1879). The last state teacher-training school in the 19th century was founded in 1893 in Osijek. In the early 20th century Croatian teacher-training schools were founded in the Croatian Littoral region and Istria – in Kastav, where the Croatian Department of the Teacher-Training School was moved from Koper in 1906, and in Pazin where the Women's Private Teacher-Training School was founded in 1912. During the early 20th century within the region now known as Croatia a total of 11 teacher-training schools were active. If we add to this number two female lyceums (in Zagreb and Rijeka), where future women teachers were being educated, it is possible to state that there were a total of 13 teacher-training institutions.

Through modern and liberal laws both education and the position of teachers were improved. The Austrian school law (*Reichsvolksschulgesetz*) from 1869 provided a legislative framework for the regulation of education in Dalmatia and the Military Region where, through the consent of the Vienna State Ministry for Education, teacher-training schools lasted three instead of four years as previously defined by legislature. A four-year teacher education in Dalmatia was introduced in the school year 1904/05¹⁶. The Croatian School Law from 1874, which regulated public education and teacher education within the Kingdoms of Croatia and Slavonia, also maintained a three-year teacher training educational system. With the School Law of 1888 it becomes a four-years long system, and it will remain as such until 1929. As the Croatian school laws were largely in accordance with Austrian School Law, the education of teachers was based on similar formal and subject matter basis in all Croatian regions.

Teacher-training schools allowed admittance to healthy and morally sound young boys/girls who reached the age of 15 and have completed a junior gymnasium, a general program secondary school or a civic or higher public school. At the end of the fourth grade, a matriculation examination had to be taken and it conferred the status of *temporary teacher*, while a steady placement was achieved with a *training certificate*, obtained after two years of teaching service and the passing of the proficiency exam. Based on the School Law of 1888, in 1889 a curriculum was established for teacher-training schools in the Kingdoms of Croatia and Slavonia (Table 1)¹⁷, which in essence was not different from that of the Dalmatian teacher training schools.

¹⁶ I. Dizdar, *Zakoni i propisi za opće pučke i za građanske škole u Dalmaciji*, Zadar, 1913, p. 91.

¹⁷ In relation to the curriculum of 1875 there was a change in the schedule of specific subjects, and new courses were introduced such as *Mechanical (rotary) Operations in a Workshop* within the male, and *Household* in the female teacher-training schools. During the school year of 1892/93,

Table 1. *The teacher-training schools curriculum in the Kingdoms of Croatia and Slavonia in 1889*

<i>Subjects</i>	1 st year	2 nd year	3 rd year	4 th year	Total
Religious Education	2	2	2	2	8
Pedagogy and Practical Exercises	-	4	6	9	19
Croatian or Serbian Language	4	3	3	3	13
German Language	2	2	2	2	11
Geography, History and the Teaching of the Constitution	3	3	3	2	11
Mathematics and Geographic Drawing	3	3	3	2	11
Natural Sciences	3	2	1	1	7
Physics	2	2	1	1	6
Economics	2	2	2	1	7
Mechanical Operations in a Workshop	-	-	2	2	4
Calligraphy	1	1	-	-	2
Free-hand Drawing and Modeling	4	2	2	1	9
Music and Singing	2	2	1	2	7
Piano	2	2	1	1	6
Organs	-	-	2	2	4
Gusle-playing (elective)	(2)	(2)	(2)	(2)	(8)
Gymnastics					
<i>Total</i>	32	32	32	32	128

NOTE: In teacher-training schools for women, home economics (2 hours per week) and manufacturing for women (11 hours per week) were taught instead of economics, piano and organ playing¹⁸.

The most hours per week on average belonged to pedagogy together with practical exercises, which was, among other things, a sign of emancipation of professional teachers. The weekly schedule for pedagogical subjects during the first years of the Zagreb Biennial Normal School was rather limited, while the first teachers of pedagogy were priests. During the first semester one hour per week was dedicated to teaching psychology (soul-teachings) and didactics (general science of nurturing), while during the next year and a half one or two hours per week were dedicated to the teaching of pedagogy (general science

Mechanical Operations was replaced by *Slöjd* (Handcrafting Wood), which was taught until the first decade of the 20th century.

¹⁸ *Ustrojni statut za učiteljske škole u kraljevinah Hrvatskoj i Slavoniji*, Zagreb, 1889, pp. 27 and 41.

of nurturing). As there were no pedagogical textbooks by Croatian authors, three textbooks were published anonymously in 1849 in Budim, compiled on the basis of methodological manuals from the first half of the 20th century. The published books were the following: *The Science of Nurturing*, *General Educational Science (Didactica generalis)* and *Special Teaching Science (Didactica specialis)*. This last of the three titles is the translation of «Spezielle Methodik» from *Methodenbuch* by J. Peitl.

The first Croatian pedagogical textbook authors were priests: Stjepan Ilijašević (*Training of Children or Katechetika*, 1850) and Stjepan Novtny (*Gojidba and obća učba*, 1867). Ilijašević's text was primarily for religious instructors, while Novtny's textbook was written for teacher-training schools. Later on, Novtny's textbook completely replaced the outdated Budim textbooks, although among the authors 'at hand' Novtny particularly emphasizes Franz Hermann, the author of the textbook *Allgemeine Unterrichts – und Erziehungslehre, nach dem bestehenden Methodenbuch bearbeitet* (Prague, 1861). Hermann's textbook is actually an adapted version of J. Peitl's¹⁹ *Methodenbuch*, which means that the influence of popular *Methodenbuch* was already present in the second half of the 19th century.

By arriving to the Normal School in Zagreb in 1875, a young teacher Stjepan Basariček, as the first secular teacher of pedagogy, was probably already working intensively on his first books – since in 1876 he published a textbook entitled *Theory of Pedagogy or Science of Education*, and the following year *Kratko izkustveno dušoslovje*, which became the first Croatian textbook about psychology. That same year (1877) Josip Glaser, a teacher at the Teacher-Training School in Petrinja, published a *Psychology Draft*, and a year later *Logic*. As a student of Dittes's *Paedagogium*, Glaser was introduced to the pedagogical ideas of Professor Friedrich Beneke from Berlin. Therefore all of his textbooks were based on Beneke's empirical psychology. Soon, however, it became clear that the pedagogical-psychological profile of prospective teachers was structured on Basariček's textbooks that had their theoretical basis in the works of the German educator Johann Friedrich Herbart. During the 1980s the complete collection of Basariček's pedagogical works is being published (*Uzgojoslovje*, 1880, *History of Pedagogy*, 1881, *Obće obukoslovje*, 1882, *Posebno obukoslovje*, 1884), which will soon be adapted «for school use» and see numerous publications, as well as become the dominant pedagogical textbooks used in Croatian teacher-training schools until the 1920s. The statement made by Brezinka²⁰ about the

¹⁹ R. Gönner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, Wien, Österreichischer Bundesverlag für Unterricht, Wissenschaft und Kunst, 1967, p. 93.

²⁰ W. Brezinka, *Uspón i kriza znanstvene pedagogije*, «Anali za povijest odgoja», n. 7, 2008, pp. 7-21.

increased interest in scientific pedagogy in Austria among elementary school teachers, whose professional self-perception was based on science they were researching, can also be applied to Croatia.

An important component of any education of teachers was also the professional training conducted either through self-education or through various other activities such as courses, lectures, professional seminars and meetings. Pedagogical literature was considered to be the most appropriate instrument for additional teacher education/training. Teachers initiate and edit educational journals as an important form of professional communication. From 1859, and the publishing of *Napredak* (Progress), the first pedagogical journal in Croatia, until the First World War, about 30 different pedagogical journals were published in Croatia. During the second half of the 19th century teachers' associations were being established, which, besides protecting the rights and interests of teachers, cared about the improvement of teacher education. The most important role in this field had the Croatian Pedagogical-Literary Society, which already in the year of its founding (1871) presented two important initiatives – the organization of the first Croatian General Assembly of Teachers in Zagreb and the publishing of the translated textbook *Didactics* by J.A. Komenski as the first book of the *Library for Teachers*. In this edition, until 1917, the Croatian Pedagogical-Literary Society published 54 books, including translations of pedagogical classics such as Spencer, Rousseau, Pestalozzi and Rabelais.

The issue of improving teacher education was a frequent topic of public statements and debates within professional journals. The idea of academic education was first mentioned during the Croatian General Assembly of Teachers held in Petrinja in 1874. About ten years later, during the discussions about the revision of the School Law from 1874, certain specific suggestions about the improvement of teacher education were made. Ivan Filipović²¹, for example, in 1883 proposed teacher-training schools as two-year vocational institutes that would only teach pedagogy and related sciences, and would be attended by teacher candidates only after their completion of a higher gymnasium or a general program secondary school. In the early 20th century the issue of academic training for teachers was raised once again. A teacher named Josip Binički²² presented a teacher training concept along the lines of what was

²¹ In 1882 and 1883 a series of unsigned articles was published in *Napredak*, later to be unified in a booklet publication titled *Revision of the School Act from October 14th 1874*, in which the author criticized the proposed revisions of Mažuranić's School Laws, particularly emphasizing the questions of teachers. Within Pedagogical Historiography Ivan Filipović is repeatedly being referred to as the author of the articles.

²² During the 23rd General Assembly of the Croatian Teacher Associations Binički presented a paper entitled *How to Organize the Education of Common Teachers According to Modern Times Needs?* The presented paper, along with some other works by J. Binički, was published in the book *The Question of Teachers in Croatia*, Zagreb, 1910.

advocated by Filipović – a general education acquired within a comprehensive high school education followed by a two-year vocational training at a teacher academy. The situation in Croatia, however, was still not adequate for such proposals regarding the educations of teachers, mostly due to a lack of consent within the teachers' community, as well as within the political structures.

Five-year teacher training between the two world wars

For almost a decade attempts were made within the new union of states – the Kingdom of Serbs, Croats and Slovenes (since 1929 known as the Kingdom of Yugoslavia) – to create uniform school laws for all levels of schooling. It finally happened in 1929 with the introduction of a special Teacher-Training School Law. A teacher-training school became a five-year long senior high school education program which only students with completed four years of lower secondary school education or a civic school education could attend, and only after passing all of the final and admittance exams. After the completion of the five year long program the candidates had to take a final diploma exam in order to gain their qualifications as public school teachers together with the possibility of obtaining positions as temporary teachers. After a successful two-years working period, a temporary teacher could, and within a time period of four years had to, take the practical exam in order to acquire the status of a permanent teacher. Teacher-training schools were obliged to provide trainees with a general and professional (pedagogical) qualifications, to educate them in the spirit of the state and national unity and religious tolerance as well as to accustom them to the national, educational and cultural mission ahead of them. The curriculum for teacher-training schools was unified for all students within the Kingdom of Yugoslavia²³.

According to the curriculum from 1931, the students studying for five years in teacher-training schools, had to attend 23 different courses, with 32 hours of class time per week in the first three grades and 31 or 30 hours during their fourth and fifth grades (Table 2).

²³ *Zakon o srednjim školama i Zakon o učiteljskim školama*, Belgrade, Izdavačka knjižarnica Gece Kona, 1930.

Table 2. *The curriculum for Teacher Schools in the Kingdom of Yugoslavia (Belgrade, 1931)*

<i>Courses</i>	I.	II.	III.	IV.	V.
Psychology and Logic (3 rd grade) Psychology of Children and Pedagogical Psychology (5 th grade)	-	-	4	-	2
General Pedagogy	-	-	-	4	-
History of Pedagogy	-	-	-	-	2
Methodology	-	-	-	2	2
School Work	-	-	-	4	6
School Organization and Administration	-	-	-	-	1
National Economy with Basic Sociology	-	-	-	-	2
Study of Religion	2	2	2	2	2
Common Language	4	4	3	3	3
Foreign Language (German or French)	3	3	3	3	2
History	2	2	2	3	2
Geography	2	2	2	-	1
Natural Science	3	2	2	2	-
Chemistry and Technology	2	2	-	-	-
Physics	-	2	2	2	-
Mathematics	3	3	3	2	-
Hygiene	-	-	-	-	2
Agriculture and Household	2	1	1	-	-
Drawing and Calligraphy	2	2	2	-	-
Singing	1	1	1	1	1
Playing Instruments	2	2	1	1	-
Manufacture	2	2	2	-	-
Gymnastics	2	2	2	2	2
<i>Total hours per week</i>	32	32	32	31	30

The changes of pedagogical paradigms, announced in Europe in the early 20th century by reformatory pedagogical movements, were also significantly present in Croatia. The shortcomings as well as positive sides of the New School were listed and pointed out, while «the mere theorizing» was criticized and practical work praised. The inertness of the new state – the Kingdom of SCS and its educational policies versus the modern educational tendencies, was supplemented through professional activism and an intense pedagogical work of teachers. They were the leaders of the practical school reform, more precisely the *didactic-methodological renewal* that promoted a *working school* as a universal pedagogical principle. From the mid 1920s to the mid 1930s

they organize ferial educational courses aimed at professional development of teachers and the successful implementation of the internal school reform. The courses were organized continuously in Zagreb, but also on other, mostly coastal, locations such as Sušak, Krk, Kraljevica, Novi Vinodolski, Crikvenica, Selce, Rab, Dubrovnik and Delnice.

The creation of such reformatory climate finally influenced the official educational policy, which was confirmed by the mentioned curriculum for teacher-training schools, which in some elements anticipated the changes to come. This refers, for example, to differentiation of pedagogical groups of subjects. The subject *Children and Pedagogical Psychology* is taught as a separate subject in the fifth grade, while *Methodology* and *School Work* are taught as separate subjects in the fourth and fifth grade, which is in accordance with the requirements of the acquaintance with the child and the reorganization of the practical methodical segment. *General Pedagogy* was taught four hours a week in the fourth grade, *History of Pedagogy* for two hours and *School Organization and Administration* for one hour per week in the fifth grade.

Under the idea of the unification of teacher education, a centralist educational policy was carried out which projected teachers as an important supporting element needed for the implementation of Yugoslav ideology. In the 1920s the Croatian teacher-training schools are no longer using Basariček's textbooks, which were continuously re-released until his death in 1918. Pedagogy teachers probably did not abandon Basariček's textbooks, especially as the Serbian author of a new official Pedagogy textbook – Ljubomir Protić – was also a student/supporter of Herbart's school of thought. Only in the 1930s was there an appearance of a few Croatian pedagogical manuals created by Croatian teachers working as educators in teacher-training schools. Names such as Josip Demarin, Salih Ljubunčić, and Zlatko Špoljar were suggested to teachers and teacher trainees, together with textbooks and authors such as Radmila Vučić (*Basics of Pedagogy*, 1934), Dušan Rajičić (*Special Didactics*, 1921) and J. Schmieder (*General Didactics*, translated into Croatian in 1933).

In the mid-1930s, after ten years of organizing ferial educational courses, a state project set up model schools that were supposed to serve as examples in the spirit of the *new working school*²⁴, but also as the indicator of the future development and direction «of the Yugoslav Pedagogy». The first model school was founded in 1935 in Belgrade as an example that was supposed to be followed by other 13 model schools established in the Kingdom of Yugoslavia before the beginning of the school year 1938/39. The first model school in Croatia was established in 1937 in Zagreb. During the first four months of 1938 it was visited by approximately 650 teachers.

²⁴ The teachers were supposed to follow the *Pedagogical-Psychological Instructions* written by Dragoljub Branković in 1937, an inspector of the Ministry of Education in Belgrade.

The continuation of formal education after the completion of a teaching school in Croatia becomes possible in 1919 when a biennial Higher Pedagogical School²⁵ was founded in Zagreb. Its purpose was to educate teachers for higher elementary (civil) schools, school supervisors and teachers working at teacher-training schools, simultaneously contributing to the promotion of reformatory pedagogical ideas. By 1945, 977²⁶ participants (mostly teachers) graduated from the Higher Pedagogical School.

It is difficult to establish the number of teacher-training schools present in the region that is today Croatia due to the administrative structure of the Kingdom of Yugoslavia and the fact that from 1918 Istria, Rijeka, Zadar and the islands of Cres, Lošinj, Palagruža and Lastovo were under the rule of Italy. The data in Table 3 relates to the region of Savska and Primorska Banovina, with the exception of one school (in Mostar) in Primorska Banovina, which is not part of Croatian territory today.

Table 3. *Teacher School in Savska banovina and Primorska banovina*²⁷

Year	Number of Teachers Schools		Number of students	
	<i>Savska banovina</i>	<i>Primorska banovina</i>	<i>Savska banovina</i>	<i>Primorska banovina</i>
1928/1929	12	2	1.753	369
1937/1938	7	2	617	161

The closing of teacher-training schools and the reduction of teachers were explained by a large number of unemployed teachers, but the real problem was in their ineffective allocation and utmost disregard for the implementation of compulsory education. An attempt to correct this situation was made during the brief existence of the Croatian Banovina (1939-1940), which had the freedom of autonomous decision-making regarding its educational policies. During this brief period it was concluded that there was a deficit of 800 teachers. An attempt to solve the problem was made by re-arranging the existing teachers in a more effective way, the use of part-time teachers from the ranks of high

²⁵ From 1926 to 1930, and then from 1941 until 1944 the Higher Pedagogical School lasted four years.

²⁶ Cfr. *Zbornik Pedagoške akademije Zagreb 1919-1979*, Zagreb, Pedagoška akademija Zagreb, 1979, pp. 204-211.

²⁷ According to S. Gaćina Škalamera, *Dinamika razvoja osnovnih i srednjih škola u Hrvatskoj od 1900. do 1940.*, «Anali za povijest odgoja», n. 3, 2004, pp. 83-111.

school graduates and graduate students of the Faculty of Philosophy, University of Zagreb, and increasing the number of teacher-training schools²⁸.

During the Second World War, in the Independent State of Croatia teacher-training schools lasted four years, while a possible fifth grade with pedagogical studies subjects was offered to high school students who wanted to become teachers after their graduation. The subjects present in the curriculum remained the same as they were in the 1930s, with the exception of the Italian language, which was now taught alongside the German language. In the period from autumn 1943 until the end of the war, Partisan teacher training courses were also organized. Besides pedagogical knowledge, the candidates would acquire professional knowledge about various disciplines within the boundaries of the subject at hand, as well as the compulsory ideological-political lectures.

The education of teachers for socialism – a step towards the academic community

An insufficient number of teachers after the Second World War, caused by war casualties, devastation and by the increased number of elementary schools, was solved by various forms of abbreviated, specialized, and accelerated education. Alongside teacher-training schools various functional classes were also organized. *Preparation A Classes* were organized for gifted children of peasants and workers who had outgrown their regular education (13-17 years), and finished their elementary schooling with better results and a few grades of their junior high school education. The classes were organized in order to compensate for the incomplete junior high school education and in order to be able to continue their education at a teacher-training school. The *Preparation B Classes* were intended for students over 17 years of age who were in the teaching service, but still had not completed their junior high school education. After attending preparatory classes, they would attend a *one-year long pedagogical course* organized for students who were too old for regular education, and had passed the lower course exam («little graduation»). After one year of attending the course, they would be qualified to work as teachers. A similar function was assigned to the so called *Special Classes*, intended for teacher assistants, who would also acquire the necessary professional qualifications through a one-year long educational period. Alongside some teacher-training schools (Zagreb, Karlovac), there were courses intended for students who had completed their high school education. The courses offered pedagogical subjects for those who wanted to become teachers after completing high school and passing the matriculation examination. Finally, during a four-year period, from 1947/48 to

²⁸ *Godišnjak banske vlast Banovine Hrvatske*, Zagreb, 1940, p. 41.

1950/51, regular students in teacher-training schools would complete the fourth grade after the first semester, in order to start working as soon as possible²⁹.

Starting with the school year 1952/53, teacher-training programs once again lasted for over five years. Simultaneously the teacher's education reform was once again being debated. Serious thought is given to the possibility of abolishing teacher-training schools and the establishing of teacher academies, which in turn resulted in 1953/54 with students not being able to enroll in first grade at teacher-training schools. However, real changes occurred only after the introduction of a federally regulated, compulsory eight years long school education (1958). Discussions about the four-year Pedagogical Academy concept were still current but, as it was the case earlier, the prevailing opinion at that moment was that such goal was not achievable, so as a realistic solution the concept of a two-year pedagogical academy was accepted. The enrollment of the last generation of students of the five-year teacher-training school occurred in 1960/61.

Contemporary changes, as well as the new social and political situations, also influenced the curriculum. During the first five post-war years they were frequently changed and adjusted. Russian was taught as a foreign language, the Constitution of the Federal National Republic of Yugoslavia was introduced as a separate subject, *General Marxism-Leninism* was taught as part of the fourth grade curriculum, while in all four grades two hours per week were dedicated to pre-military training. In the 1950s a total of 21 subjects was taught as part of the five-year teacher-training school curriculum, the weekly student schedule was somewhat relieved, the foreign language was no longer exclusively Russian, an increase in course hours developing work habits and skills was noted, while seminar work for the major groups of subjects, focused on the development of individual and independent working skills, was introduced on an alternating two hours per week basis (Table 4).

Table 4. *Teacher School Curriculum in 1952*³⁰

Number	Courses	I.	II.	III.	IV.	V.
1.	General Pedagogy	-	-	2	2	2
2.	History of Pedagogy	-	-	-	-	2
3.	Psychology and Logic	-	-	4	2	-
4.	Methodology and Practical Exercises	-	-	-	5	8
	Seminar Work and Pedagogical Groups of Subjects	-	-	-	-	(2)

²⁹ The data from this segment can be found in the *National Republic of Croatia – Ministry of Education Yearbook 1949-50*, Zagreb, 1951.

³⁰ *Nastavni plan i program za učiteljsku školu*, Zagreb, Savjet za prosvjetu, nauku i kulturu RH Hrvatske, 1952, p. 3.

5.	Croatian or Serbian Language and Literature	4	4	4	4	4
	Seminar Work and National Language and Literature	-	-	-	-	(2)
6.	Foreign Language (Russian, English, French, German)	3	2	2	2	2
7.	Basic Marxist Philosophy	-	-	-	2	-
8.	Social Structure and Polity of FNRJ	-	-	-	-	2
9.	History	3	2	2	2	2
10.	Geography	2	2	2	-	2
	Seminar Work – Social Scientific Group of Subjects	-	-	-	(2)	-
11.	Natural Science	2	2	2	2	-
12.	Chemistry with Mineralogy	3	2	-	-	-
13.	Physics	-	3	2	2	-
	Seminar Work – Natural Scientific Group of Subjects	-	-	-	(2)	-
14.	Mathematics	3	3	2	2	2
15.	Hygiene	-	-	-	-	2
16.	Economics	-	-	2	1	-
17.	Manufacture	2	3	-	-	-
	Exercises in Women Manufacturing	(2)	(2)	(2)	-	-
18.	Music Lesson	3	3	3	2	-
19.	Drawing, Calligraphy and History of Art	3	3	2	1	-
20.	Physical Exercise	2	2	2	2	-
21.	Pre-Military Training	-	2	2	2	2
	<i>Total hours per week</i>	30	33	33	33	30

The task of teacher-training schools was to «successfully build the image of a common teacher» or «a pedagogical and social workers, who has a solid general, pedagogical and ideological-political education»³¹. *The Pedagogical Academy Law* (1960) introduced a two-year study program for teachers. At the same time pedagogical high schools were established, while middle teacher-training schools were abolished. The academic year of 1960/61 was marked by the enrollment of the last generation of students in middle teacher-training schools. Most teacher-training schools and higher pedagogical schools were now transformed into pedagogical academies. During the early 60s there were 14 pedagogical academies in Croatia. It soon turned out that this number was disproportioned, especially as some of the academies did not have adequate work conditions. This resulted in 1965 with a gradual abolishment of academies in Karlovac, Šibenik, Dubrovnik, Pakrac and Slavonski Brod, while the nine remaining, located in Zagreb, Čakovec, Petrinja, Gospić, Rijeka, Pula, Zadar,

³¹ *Ibid.*, p. 3.

Split and Osijek, continued with their work. Until 1978 specialized teachers for upper elementary schools were educated alongside classroom teachers within the academies.

With the development of pedagogy as an academic discipline there is a gradual abandonment of its perception as a «professional science» for teachers. In the second half of the 20th century this role was taken over by different methodologies, which are now separating from pedagogy and didactics and are becoming «autonomous inter-disciplines in which the key roles are now divided between educational and mainstream sciences»³².

Both the emancipation and the affirmation of the methodology of different subjects as individual disciplines in the last decades of the 20th century, and the emphasized ideological nature of pedagogical subjects in the first decades after World War II are both influential characteristics of the pedagogical aspect of teacher training in the second half of the 20th century. All subjects had to be «imbued with originality», but the fact that the «pedagogical group of subjects was relating directly to the philosophical and political issues»³³ very much influenced not only the pedagogical profile of the post-war teachers, but also the future development of pedagogy in Croatia. Teachers were considered to be «first-class social workers», so the question of their «pedagogical and methodological qualifications» was «a first-class social and national issue». In order to achieve a good or, more precisely, correct pedagogical education it was not enough to acquire a certain amount of pedagogical knowledge and skills. What was important was that «the future teacher, within his/her theoretical and practical pedagogical training and during his/her schooling, acquires such an ideological and political orientation which will not remain only a matter of understanding, knowledge, intellect and theories, but also a matter of the heart and will, a Marxist-Leninist-oriented feelings and subsequent actions»³⁴.

In the early post-war years the pedagogical education of a ‘new teacher’ was structured around the use of translated Russian pedagogical textbooks edited and published by P.N. Gruzdjev, B.P. Jesipov or N.K. Goncharov. In 1951, structured on the Russian model of collective work and edited by Stjepan Pataki, the textbook *General Pedagogy* was published. Teacher-training schools primarily used the textbook, and many subsequent editions followed the original version. Through pedagogy courses the students were expected to adopt the Marxist-Leninist understanding of education as a segment of

³² A. Bežen, *Metodika: znanost o poučavanju nastavnog predmeta: epistemologija metodike u odnosu na pedagogiju i edukologiju – s primjerima iz metodike hrvatskoga jezika*, Zagreb, Učiteljski fakultet, Profil, 2008, p. 347.

³³ K. Škalko, *Kvalitet nastave i ideološko i stručno usavršavanje nastavnika*, u knjizi *Didaktička pitanja*, (ur. Ivo Tošić), Zagreb, Pedagoško-književni zbor, 1946, p. 8.

³⁴ S. Pataki, M. Koletić, P. Šimleša, *O pedagoškom obrazovanju nastavnčkih kadrova*, «Pedagoški rad», 3, 1949, pp. 155 and 161.

social life, to become familiar with the aims, objectives, content, methods and organization of socialist education as well as to be trained for work as educators of a nation³⁵.

The abolishment of teacher-training schools and the elevation of the education of teachers to a higher pedagogical school level coincides with the affirmation of methodology as a science, which according to Bežen³⁶, occurs in the 1960s with the introduction of methodology as a compulsory subject present within the teacher education curriculum. The methodological training of future primary school teachers is set apart from the general pedagogical training, and it becomes not only equal, but, according to Bezić, a unifying element in a three-part corpus teacher education³⁷. Moreover, the methodological training is characteristic for the teacher-training school, and a teacher's competence comes out of and reflects his/her methodological training.

The status and prospects of teacher education in the independent Croatia

After three decades of existence of the two-year teacher-training program at the pedagogical academies, in 1992 a four-year professional study program for primary school teachers was introduced. The first two years of the program were mostly dedicated to substrate sciences as the basis for teaching courses in the first four grades of elementary school and the pedagogical-psychological group of subjects, while the third and fourth years of the program were reserved for methodological training. New changes occurred already in 1997 with the introduction of an advanced study of one subject (usually the mother tongue, history or mathematics) within the existing curriculum of teacher-training studies in higher teacher-training schools. The purpose of such changes in the curriculum was to provide teachers with additional competencies³⁸. A similar model was also preserved after adaptation of the teacher-training studies to the principles of the Bologna Declaration during the 2005/06 academic year. The following transition from a professional to an academic program, and the

³⁵ *Nastavni plan i program za učiteljsku školu*, cit.

³⁶ *Metodika: znanost o poučavanju nastavnog predmeta: epistemologija metodike u odnosu na pedagogiju i edukologiju – s primjerima iz metodike hrvatskoga jezika*, cit., p. 352.

³⁷ A three-part corpus of teacher education consists of: the subject materials of the substratal professions, pedagogical-psychological materials and subject methodologies (cfr. K. Bezić, *Učitelj u zemlji čudesa*, Zagreb, Hrvatski pedagoško-književni zbor, 2003, p. 137).

³⁸ Primary education teachers, besides the basic educational work within a classroom, had the possibility to teach subjects which they specialized in within their advanced studies or in the upper grades of elementary school (from the fifth to the eighth and final grade). This was done under the condition that there were no graduate students who have completed the specified studies with a full study load (which was due to the lack of specific profiles of teachers in Croatia not a rare case).

possibility for a scholarly development within a postgraduate program, or a purely professional orientation within postgraduate specialized programs, defines an important qualitative shift in the education of teachers.

Structural changes caused by the development of a society of knowledge, and the introduction of the Bologna Process redefined the teacher within a modern school as no longer an exclusive source of knowledge. He is an assistant, an adviser, a manager, mentor and a mediator who by encouraging his/her students to actively learn actively causes them to change and accelerates their becoming independent. New circumstances demand an educational and ethical, pedagogical and psychological, didactic and methodological and finally technologically qualified teacher who can deal with the challenges of modern times. A quality teacher today is the *conditio sine qua non* for stepping out of the traditional elementary school into an initial education and training that will be dedicated to preparing students for lifelong learning.

Within the concept of lifelong learning, the development of a teacher is a continuous process that does not end with the teacher's diploma, but is instead in synergy with continuous improvement. After the initial education, the training for the teaching profession, a teacher must be ready for a permanent and continuous education in order to effectively respond to new requirements that are continually being set in front of him/her.

Since the second half of the 20th century, the continuing training of teachers is being approached with particular seriousness. This type of education, characteristic mainly for Europe, developed in two phases. The first phase was voluntary and informal, while during the second phase it evolved into a structured activity based on legal provisions committing teachers to participate in them³⁹. The training of teachers in Croatia is a legal obligation defined by a separate legal ordinance⁴⁰ and it is, despite many problems⁴¹, observed closely.

The lifelong education of teachers becomes particularly significant when the connection between teacher education, the activities of a teacher and student learning is taken into account. In this regard, four different levels of action have been identified, in accordance with the idea of a distinguished teacher in a contemporary society: (1) a *model teacher*, possessing skills every teacher should

³⁹ In some European countries, continuous training of teachers is simultaneously introduced at all levels (primary and secondary) of schooling (Germany, Austria, Portugal, Scotland and Norway), and in countries where this is not the case (Spain, France and Luxembourg), a formal teacher training for people working in elementary schools was first introduced. Today, the regularized training of all categories of teachers is present almost everywhere. These regulations have a variety of shapes – laws, ordinances, regulations, decisions etc., and they determine the details of the organizational methods, or just the most general goals.

⁴⁰ *Pravilnik o napredovanju učitelja i nastavnika u osnovnom i srednjem školstvu*, «Narodne novine», 1995, p. 89.

⁴¹ For more information see I. Radeka, *Cjeloživotno obrazovanje nastavnika u Hrvatskoj, u zborniku Kurikulumi ranog odgoja i obveznog obrazovanja: Curriculums of Early and Compulsory Education*, Zagreb, Učiteljski fakultet Sveučilišta u Zagrebu, 2009, pp. 659-670.

exhibit in the form of (2) *teacher competencies*. According to the competencies that are defined as education goals, it is necessary to develop a concept and a model for the (3) *education of a teacher* that will enable the achievement of the competencies and finally determine the model for the evaluation of (4) *teacher activities* in order to determine its effect, simultaneously taking into account the impact made on student learning. In this way each of the three links are clearly positioned within the casual chain – the education of teacher, teacher activities and learning activities of students⁴². Currently there is an increasing quantity of scholarly research and academic conferences dedicated to the articulation of new models for the application of teacher education aimed at the needed competences, and required standards.

The lifelong education of teachers, as the first segment of the initial education and the second segment of a continuous professional development, can no longer be reduced solely to the more specialized high schools for teacher education. The formal training of teachers today is strongly complemented with non-formal and informal forms of learning opportunities offered by the contemporary society of knowledge. Moreover, during initial teacher education studies, students are increasingly choosing their own educational content. The focus of attention shifted from a controlled process of education (i.e. teacher training) to the measurement of learning outcomes (i.e. competencies), which a teacher has to administer, regardless of the terms of their acquisition. In these circumstances, the teacher is becoming an active co-creator of his/her own education.

⁴² E. Terhart, *Standardi za obrazovanje nastavnika*, «Pedagogijska istraživanja», n. 1, 2005, pp. 69-83.

The development of primary school teacher education in Serbia in the 19th and the first decade of the 20th century

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ABSTRACT: In this paper, we have dealt with the institutional development of teacher education in Serbia in the 19th and the first decade of the 20th century. In this historical period, Serbia gained international recognition which has opened the way for the gradual development of a national school system. Since their establishment, the male teachers' schools in Serbia had the status of senior high schools. In a very short span of time, they produced a sufficient number of teachers who organised themselves into a strong professional community and contributed greatly both to the modernisation of Serbian education and to the development of pedagogy as a scientific discipline. Education of female teachers, on the other hand, took place in the so-called advanced schools for women, which, only at the turn of the centuries, evolved into female teachers' schools – their development was slow and difficult, partly due to the dominant patriarchal culture of the time. The development of teacher education went hand in hand with the development of pedagogy as scientific and academic discipline in Serbia. Hiring doctors of pedagogy, trained at European universities, as lecturers at teachers' schools, marked a qualitative leap in teacher education: educational thought developed in European countries, particularly in Germany, found its supporters in Serbia, who afterwards continued to develop authentic Serbian pedagogy and simultaneously educate generations of teachers in the spirit of educational concepts dominant at the time.

EET/TEE KEYWORDS: Teacher Education; College of Education; Women's Education; Pedagogical Theory; School System; Serbia; XIX-XX Centuries.

Introduction

Two distinct approaches to the study of institutional development of teacher education can be followed in Serbian pedagogical historiography. The first is inherent to studies initiated to mark key historical dates – anniversaries of teacher training schools. These studies first appeared in the late 19th century, and are common even today. They are characterised by a positivistic approach – providing a wealth of information on the work of teacher training schools, but a defined critical historiographical attitude is often missing from them. The other approach was developed in the early 20th century and remained dominant until the eighties. Within it, studies were created in which the history of the development of teacher education in Serbia was regarded in the spirit of socialist (Marxist) ideological thought. Unfortunately, we still do not have even a single paper of synthetic character, in which the issue of teacher education development is considered in the wider context of the development of both the school system and the science of pedagogy in Serbia.

The problem at hand dealt within this paper refers to the process of institutional development of male and female teacher education in Serbia in the 19th century and the first decade of the 20th century. It is in this particular context that we have considered a number of research questions, namely: in what way have specific socio-historical circumstances influenced the establishment and operation of teacher training schools, which were the specificities (similarities and differences) in the development of male and female teacher education, how did teacher education in Serbia change over time and what was the impact of these changes on improving the quality of primary education, and, finally, what was the relationship between teacher education and the development of pedagogical science in Serbia. In studying these questions, we relied on sources from the available archives (teacher performance reports), memoirs (of the students and lecturers of teacher's schools as well as of teachers themselves), laws and regulations relating to the operation of teacher training schools, the work of Serbian pedagogues, as well as on a number of studies on teacher education.

Male teacher education in the Principality of Serbia between 1804 and 1871

In order to better understand the development process of primary-school male teacher education in the Principality of Serbia, it is necessary to first gain a wider perspective of the socio-historical context in which this process took place, and of the situation in the field of education at the time. The first male teacher training college in the Principality of Serbia was not established until 1871.

This belated establishment of the first teacher training school had its underlying reasons in the specific historical, social and educational circumstances of the time.

The largest part of the Serbian territories was, until the early 19th century, under the rule of the Ottoman Empire, while the northern part of Serbia (the territory of what is today Vojvodina) was part of the Habsburg Monarchy. Those Serbs who were still under Turkish occupation did not have organised education – education took place under the auspices of churches and monasteries, while in Vojvodina, a national school system was already developed in the 18th century, when compulsory primary education was introduced in 1778, with the first Serbian Teacher Training School opened the same year, High School in 1792 and the Seminary in 1794¹.

During the First Serbian Uprising (1804-1813), which marked the struggle for national liberation from the Turkish occupation, the first national government was established in the Principality of Serbia, which also included a Ministry of Education and Religious Affairs (1811). When by the *Ottoman edict* of 1830, the Principality of Serbia was granted the status of a vassal state in the Ottoman Empire and the autonomy to organise its schools independently, legal conditions were created for a more intensive work in the field of education. From the 40 primary schools that Serbia had in 1830, their number grew to over two hundred in the mid-19th century².

The question of what skills and qualifications teachers in the Principality of Serbia should have was first regulated by the law passed in 1844, which stipulated that persons eligible to work as teachers in primary schools can only be those who have graduated from a seminary and have read Pedagogy with Subject Specific Didactics, as an elective subject in the 5th and 6th grade of Grammar School, once it gets introduced into the school curriculum³. Now, how was this provision implemented in practice? At that time, there was only one seminary in Belgrade (founded in 1836), which had the status of a junior high school (it enrolled boys who have completed a four-year primary school) where «Teaching Method» was taught as a mandatory subject, so that theology

¹ On the history of the Serbian people see, V. Corovic, *Istorija srpskog naroda* [History of the Serbian Nation], Cetinje, Svetigora, 2009 (in Serbian). On the development of institutional education of Serbian teachers on the territory of Habsburg Monarchy see, E. Protner *et al.*, *The Development of Teacher Training in the States of Former Yugoslavia*, in H. Németh, E. Skiera (edd.), *Lehrerbildung in Europa. Geschichte, Struktur und Reform*, Frankfurt am Main [etc.], Peter Lang, 2012, pp. 241-242.

² S. Cunkovic, *Skole u Srbiji u XIX veku* [Schools in 19th Century Serbia], Belgrade, Pedagoski muzej, 1971, pp. 8-9, 36 (in Serbian).

³ *Ustrojenije javnog ucilisnog nastavenija (23. septembar 1844)* [Law on Organisation of Public Education (23 September, 1844)], in *Zbornik zakona, uredba i ukaza izdani u Knjazestvu Srbiji od aprila 1840. god. do konca decembra 1844* [Collection of Laws, Ordinances and Decrees Issued in the Serbian Principality from April 1840 to end of December 1844], Belgrade, Drzavna stamparija, 1844, pp. 315-345 (in Serbian).

graduates left the seminary with some sort of pedagogical training. On the other hand, although the law provided that Pedagogy with Subject Specific Didactics be introduced in the Grammar School curriculum (in 1844, there was only one Grammar School in the Principality of Serbia, founded in 1830), so as to compensate, in this way, for the lack of a teacher training school, this did not happen because there were no candidates interested in reading this subject⁴.

In the forties and fifties of the 19th century, two «chief school inspectors», Milovan Spasic⁵ and Petar Radovanovic⁶, had the main role in organising the work of primary schools in the Principality of Serbia. An analysis of the inspectors' annual reports on the state of primary schools in 1846 shows that, out of 199 teachers for whom they entered records on their educational qualifications, 59 had graduated from a seminary, 11 from a teacher training college, 9 had full high school, 19 junior high school, 18 a year or two in a seminary, 2 had studied for two years at the Faculty of Philosophy in Belgrade, 4 had university degrees and 77 had completed only primary school or acquired basic literacy in a monastery⁷. In the school-year 1845-46, in the Principality of Serbia there were 187 male primary schools with 212 teachers, two-thirds of whom came from Vojvodina (which, at the time, was part of the Habsburg monarchy)⁸. Among the teachers who came from Vojvodina, there were those who had completed the Teacher Training School in Sombor, a Seminary or

⁴ *Arhiv Srbije, Fond Ministarstva prosvete i crkvenih dela (AS, MPS), 1847, f. IV/283, n. 816, Beograd, 4. maj 1847, Predlaze se da D. Isailovic napise plan za Pedagogiju sa metodikom* [The Serbian Archive, Ministry of Education and Religious Affairs Fund (from now on: SA, MER), 1847, f. IV/283, n. 816, Belgrade, 4 May, 1847, It is proposed that D. Isailovic draft a curriculum for Pedagogy with Subject Specific Didactics] (in Serbian). Isailovic graduated from the Faculty of Philosophy in Budapest (1808) and taught pedagogy and other courses at the Teacher Training School in Sombor in the period 1816-1830. At the invitation of Prince Milos, in 1830, he moved from Vojvodina to the Principality of Serbia and was engaged as professor at the Grammar School in Belgrade. On D. Isailovic see, N. Potkonjak, *Pedagogija u Srba* [Pedagogy of the Serbs], Belgrade, EDUKA (in Serbian).

⁵ Milovan Spasic (1818-1908) defended his PhD thesis in 1844 at the Halle University in the field of legal studies. In the period 1845-1857, he was the chief inspector for primary schools in the Principality of Serbia. He published two pedagogical works, *Moral Education of Children* (1850) and *Instructions in Pedagogy and Didactic for Primary School Teachers* (1855) as well as several primary school textbooks (for calculus, geography and biology). On M. Spasic see, N. Potkonjak, *Nasi veliki prethodnici* [Our Great Ancestors], Belgrade, SAO, 2010, pp. 187-194 (in Serbian).

⁶ Petar Radovanovic (1781-1857) graduated law at the University of Budapest. He discharged the office of a school inspector in the period between 1836-1857. On Radovanovic, see, *ibid.*, pp. 181-186.

⁷ AS, MPS, 1846, f. VI/4, n. 899, Beograd, 21. juli 1846, *Spisak ucitelja u zapadnoj polovini Knezevine Srbije u 1845/6* [SA, MER, 1846, f. VI/4, n. 899, Belgrade, July 21, 1846, List of teachers in the western half of the Principality of Serbia in 1845/6] (in Serbian); AS, MPS, 1846, f. III/83, n. 887, Beograd, 16. juli 1846, *Spisak ucitelja u istocnoj polovini Knezevine Srbije u 1845/6* [SA, MER, 1846, f. III/83, n. 887, Belgrade, July 16, 1846, List of teachers in the eastern half of the Principality of Serbia in 1845/6] (in Serbian).

⁸ D. Ivanovic, *Srpski ucitelji iz Habzburške monarhije* [Serbian Teachers from the Habsburg Monarchy], Belgrade, ZUNS, 2006, p. 43 (in Serbian).

Grammar School (in Sremski Karlovci, Novi Sad, Budapest, Vienna, etc.), while those who had graduated from the Seminary in Belgrade were regarded as best trained among the teachers who originally came from the Principality of Serbia.

The new law on primary schools of 1857 stipulated that, for the time being, the candidates who have graduated with honours from seminary or grammar school may be hired as teachers, while in future teachers may become only those who have graduated from the Pedagogical Institute, which was scheduled to open soon⁹. This Pedagogical Institute (called Teacher Training College), however, was established only in 1871. Owing to the uncertain and fairly low social and financial status of teachers, the teaching profession was not considered appealing enough, so that, in the absence of trained staff in teaching positions, schools continued to hire those who had at least a year or two of grammar school or seminary or even only primary education. For this reason, the practice of organising the so-called «practical teacher training courses» for those already employed as teachers became common place relatively early in order to raise their teaching competencies. The first such courses were organised in July 1845, in Belgrade, for some thirty teachers¹⁰. The courses typically lasted three to four weeks and the teachers were taught the subjects they were supposed to teach in primary school as well as subject specific didactics. Lectures in all the subjects were given by two chief school inspectors, Dr Spasic and Radovanovic.

In order to improve the work of teachers and compensate for the lack of pedagogical literature in the Serbian language, the Ministry of Education and Religious Affairs had special instructions printed for the teachers. The first instruction for teachers was issued in 1838¹¹, the second edition followed in 1844¹² and, in 1855, Dr Spasic published his own manual, which was adopted by the Ministry of Education as an official document by which all teachers were to teach¹³. The instructions were meant to ensure consistency in the work of

⁹ *Ustrojenije osnovni ucilista u Knjazestvu Srbije (22. avgust 1857)* [Law on Organisation of Primary Education in the Serbian Principality (22 August, 1857)], in *Zbornik zakona, uredaba i ukaza izdani u Knjazestvu Srbiji od pocetka do konca 1857* [Collection of Laws, Ordinances and Decrees Issued in the Serbian Principality from the beginning until the end of 1857], Drzavna stamparija, Belgrade, 1857, p. 64 (in Serbian).

¹⁰ AS, MPS, 1845, f. II/42, n. 55, Beograd, 5. maj 1845, *Prakticno poucavanje ucitelja kod inspektora* [SA, MER, 1845, f. II/42, n. 55, Belgrade, 5 May, 1845, Practical instruction of teachers by inspectors] (in Serbian). See also, M. Spasic, *Iz autobiografije Milovana Spasica* [Milovan Spasic's Autobiography], «Nastava i vaspitanje» [Teaching and Education], vol. 7, n. 2, 1956, pp. 118-121 (in Serbian).

¹¹ *Nastavlenije uciteljima pravitelstveni i obstestveni skola u Knjazestvu Srbiji* [Instructions to Teachers in State and Municipal Schools in the Principality of Serbia], Belgrade, Drzavna stamparija, 1838 (in Serbian).

¹² *Nastavlenie za ucitelje osnovni ucilista* [Instructions for Primary Schools Teachers], Belgrade, Drzavna stamparija, 1844 (in Serbian).

¹³ M. Spasic, *Pedagogicno-metodicno nastavlenie za ucitelje osnovni skola* [Instructions in Pedagogy and Didactic for Primary School Teachers, Belgrade, Drzavna stamparija, 1855 (in Serbian).

teachers, in the sense that all of them were to abide by the same curriculum, comply with school laws and regulations and apply more contemporary teaching methods in their work, which, at that time, meant group class-work and not one-on-one teaching with each individual student, as well as the use of demonstration teaching methods, learning with understanding, the dialog method etc.

It was relatively late that the Principality of Serbia founded its Teacher Training College (1871), although a formal initiative to open such a school was there in the mid-19th century already. The first request to open such a school was submitted, in 1846, to the Ministry of Education by Dr Spasic. Visiting primary schools as a school inspector, he realised that teachers did not have the required pedagogical training and drafted *The Proposal on the Organisation of a Pedagogical Institute* in which, among other things, he referred to the practice of other European nations which had already established special schools for the training of their teachers¹⁴. Next year, Dr Spasic sent a similar proposal to the Ministry of Education¹⁵. However, there was still not enough political will or economic power in Serbia to bring this idea to fruition.

When in 1845, the Board of Education was formed with the objective to provide professional assistance to the Minister of Education in the organisation of the school system, the body was tasked with organising special professional exams for those who did not have the necessary qualifications, but wanted to teach in primary schools. In 1849, the Board of Education was replaced by the School Commission which continued to perform the same task over the next two decades¹⁶. Teacher examinations included testing of the candidates' general education, but did not also check their teaching competencies to work with children – the candidates were only required to know the subject matter they were expected to teach to the students¹⁷.

The establishment of the first Teacher Training College in the Principality of Serbia was closely associated with the work on the improvement of pedagogical literature. In the late sixties and early seventies of the 19th century, Minister of Education Dimitrije Matic and Secretaries of Education, Milan Dj. Milicevic, Milorad Popovic-Sapcanin and Stevan D. Popovic, prepared a series of

¹⁴ AS, MPS, 1846, f. VI/4, n. 550, Beograd, 21 jul 1846, *Predlog o uredjenju pedagogskog zavoda g. M. Spasica* [SA, MER, 1846, f. VI/4, n. 550, Belgrade, 21 July, 1846, A proposal on the Organisation of the Pedagogical Institute by M. Spasic] (in Serbian).

¹⁵ AS, MPS, 1847, f. I/63, n. 127, Beograd, 13. decembar 1847, *Predlog M. Spasica o nuzdi i potrebi osnivanja seminarijuma u kome bi se mladici za ucitelje osnovni ucilista izobrazavali i vospitavali* [SA, MER, 1847, f. I/63, n. 127, Belgrade, 13 December, 1847, Proposal by M. Spasic on the necessity and need to set up seminaries to educate and teach young men to become primary school teachers] (in Serbian).

¹⁶ On School Commission see, V. Tesic, *Glavni prosvetni savet (1880-1980)* [High Council on Education (1880-1980)], Belgrade, ZUNS, 1980 (in Serbian).

¹⁷ On teachers exams see, Spasic, *Milovan Spasic's Autobiography*, cit., pp. 118-121.

original pedagogical publications for Serbian teachers¹⁸. In 1868, Milicevic launched *The School*, Serbia's first pedagogical journal, which was published in the Principality of Serbia until 1876. A special contribution to the raising of awareness of the necessity of establishing a special school for teachers was given by Dr Djordje Natosevic (1821-1887), who, in August 1867, moved from Vojvodina (which, at the time, was a part of the Austro-Hungarian Empire) where he had served from 1857 as «chief administrator of Serbian primary schools», to the Principality of Serbia, where he was appointed to the office of Secretary of the Ministry of Education¹⁹.

Upon his arrival in Serbia, Natosevic visited primary schools and submitted extremely critical reports on the conditions he had found them in. In a report on Belgrade's primary schools, which he visited between 16 and 23 of June 1868, he noted the following:

Since children are not in the least aware of what they really know, they have already forgotten almost everything that took them so much effort to learn at the beginning of the course. Whatever is learnt and committed to memory by this crude and purely mechanical way of rote learning must be forgotten in a very short time. As much as it is regrettable when even the tiniest speck of knowledge gets forgotten, it is even more regrettable when this way of learning not only leaves children with no knowledge in their heads but also gives a child's cognitive capacity no 'nourishment' for further development [...]²⁰.

According to Natosevic, all this is the result of the fact that schools are keeping unskilled teachers on their staff. He therefore proposed that the issue be given serious consideration. Natosevic's reports were reviewed by a special

¹⁸ We highlight key works: D. Matic, *The Science of Education* (1866), M. Dj. Milicevic, *Pedagogical Instructions for Teachers and Parents and all Friends of National Education* (1870), S.D. Popovic, *A Practical Lecture in Calculus I, II and III* (1870), M. Dj. Milicevic, *History of Pedagogy* (1871), M. Popovic Sapcanin, *Use of teaching aids in Primary Schools* (1871).

¹⁹ AS, MPS, 1868, f. VIII/2096, n. 1809, Beograd, 22. avgust 1867. *Postavljenje Dj. Natosevica* [SA, MER, 1868, f. VIII/2096, n. 1809, Belgrade, 22 August, 1867, Appointment of Dj. Natosevic]. Dr Natosevic graduated from the Medical School in Vienna (1850). A trained physician, he spent his professional career dealing with school issues. The literature on pedagogy and subject specific didactics for Serbian teachers in Austria-Hungary in the sixth decade of the 19th century reached its peak in Natosevic's works. His manuals, *A Brief Instruction for Serbian Public Teachers* from 1857 and *Instruction for Primary Teachers* from 1858 were used by teachers in the Principality of Serbia. In 1858 in Sombor, he launched the *School Journal*, the first pedagogical journal published in Serbian. Natosevic is credited with improving the education of Serbian teachers in Vojvodina – in 1871, the duration of the Teacher Training School in Sombor was extended from two to three years, the school also started to instruct women teachers (1866), two more two-year teacher training schools were founded (in Pakrac in 1871 and Karlovac in 1875). On the work of Dj. Natosevic see, R. Dostanic, *Natoseviceva reforma skola* [Natosevic's School Reform], Novi Sad, SPD Vojvodina, 1987 (in Serbian).

²⁰ AS, MPS, 1868, f. VIII/2096, n. 1809, Beograd, 28. jun 1868, *Izvestaj Dj. Natosevica i predlozi za beogradske osnovne skole* [SA, MER, 1868, f. VIII/2096, n. 1809, Belgrade, 28 June, 1868, Report by Dj. Natosevic and proposals for Belgrade primary schools] (in Serbian).

commission of the Ministry of Education, which then submitted, on 28 June 1869, *The Proposal on the Establishment of a Teacher Training School* for adoption by the State Council²¹.

Establishment and operation of the first Male Teacher Training College 1871-1881

The Law on the Organisation of the Teacher Training College was passed on 5 October 1870²², and the school started work on 14 January 1871, in Kragujevac. The Male Teacher Training College was established as a three-year senior high school, which enrolled boys who completed primary school and three years of lower grammar school. The first curriculum had 18 different subjects, among which were the following vocational subjects: theory of pedagogy, subject specific didactics with practical exercises, the history of pedagogy and psychology²³. Practical teacher training took place at a nearby primary school²⁴. The law required that, at the end of the third grade, students take «general teacher's ability examination». The first rules setting out the requirements to pass this examination were established on 22 March 1873²⁵. The students were first required to take written and oral examination in the majority of subjects covered by the school curriculum, before taking practical examinations in church singing, gymnastics and school teaching.

The first Professor of Pedagogy at the Teacher Training College in Kragujevac was Stevan D. Popovic (1844-1902). Popovic had completed two years of the Faculty of Philosophy in Belgrade and then completed a Teacher Seminar in Gotha, Germany (1865) where he was introduced to the ideas of German educator Karl Kehr²⁶. In 1872, he published *Working in a School*, a textbook

²¹ M. Dj. Milicevic, *Uciteljska skola u Srbiji* [Teacher Training College in Serbia], «Skola» [The School], vol. 3, n. 23, 1870, p. 368.

²² *Zakon o uredjenju uciteljske skole (5. oktobar 1870)* [Law on the Organisation of the Teacher Training College (5 October, 1870)], in *Skolski zbornik zakona, pravila i naredaba* [School Collection of Laws, Regulations and Ordinances], Belgrade, Drzavna stamparija, 1875, pp. 62-72 (in Serbian).

²³ *Ibid.*

²⁴ J. Miodragovic, *Uciteljska skola u Beogradu za prvih 25 godina svojega zivota* [Teacher Training College in Belgrade – Its First 25 Years], «Prosvetni glasnik» [Education Gazette], vol. 17, n. 3, 1896, p. 7 (in Serbian).

²⁵ *Pravila za polaganje opsteg ispita u uciteljskoj skoli (22. mart, 1873)* [Rules for Taking the General Examination in the Teacher Training College (22 March, 1873)], in *Skolski zbornik zakona, pravila i naredaba* [School Collection of Laws, Regulations and Ordinances], cit., pp. 90-93 (in Serbian).

²⁶ Popovic was professor at the Teacher Training College until 1880, when he was appointed Secretary at the Ministry of Education and Religious Affairs, in the period between 1884-1886, he was Minister of Education. Potkonjak, *Our Great Ancestors*, cit., pp. 161-174.

on pedagogy for students of the Teaching Training College, which dealt with pedagogical and didactic issues as well as subject specific didactics that most of the book was dedicated to²⁷.

Significant changes in the work of the Teacher Training College in Kragujevac occurred in 1875, when Dr Vojislav Bakic (1847-1929) was appointed to teach pedagogy in it. Dr Bakic is without doubt one of the most authentic personalities in Serbian pedagogy of the late 19th and early 20th century. He completed the Teacher Training School in Sombor in 1869, then went on to study pedagogy at the University of Leipzig (1870-1872) with Tuiskon Ziller, after which he studied with German pedagogue Karl Volkmar Stoy at the University of Heidelberg²⁸. In 1874, at the University of Leipzig, he defended his doctoral thesis on *Rousseau's Pedagogy from the Perspective of Scientific Pedagogy* and became the first Serbian scholar to hold a PhD in pedagogy²⁹. At the invitation of the Minister of Education of the Principality of Serbia, Dr Stojan Novakovic, Bakic became Professor of Pedagogy at the Teacher Training College in Kragujevac³⁰.

Commenting on the conditions of work at the Teacher Training College in Kragujevac, Dr Bakic noted the following: «The school buildings where lectures are given are bad, classrooms have low ceilings and are poorly lit, making any writing and drawing in them nearly impossible. They are also too small to fit all students in. The offices for the director, lecturers, library and teaching aids are also small»³¹. The College building was located far from the city centre and was not built specifically for the purpose, but was actually a rented private house. The boarding school for students was also located in a rented private home. The students mostly came from poor rural families, and, once in Kragujevac, soon became advocates of opposition socialist ideas. From the establishment of the college, students organised three protests – all with a political background³².

²⁷ S.D. Popovic, *Rad u skoli* [Working in a School], Belgrade, Drzavna stamparija, 1872 (in Serbian).

²⁸ Ziller and Stoy were the most prominent followers of Herbart's pedagogical ideas in Germany of the time.

²⁹ On Bakic's doctoral thesis see, N. Vujisic Zivkovic, *Vojislav Bakic i razvoj pedagogoske nauke u Srbiji* [Vojislav Bakic and the Development of Pedagogical Science in Serbia], Belgrade, Filozofski fakultet, 2012 (in Serbian).

³⁰ *Pedagoski muzej u Beogradu, Fond dr Vojislava Bakica (PM, Fond dr V. Bakica)*, 1875, f. I, br. 69, Beograd, 21. januar 1875, *Ugovor o postavljenju V. Bakica za profesora Uciteljske skole u Kragujevcu* [Pedagogical Museum in Belgrade, Vojislav Bakic's Fund (from now on: PM, Dr V. Bakic's Fund), 1875, f. I, br. 69, Belgrade, 21 January, 1875, Contract on the Appointment of V. Bakic as professor at the Teacher Training College in Kragujevac] (in Serbian).

³¹ V. Bakic, *Beleske o prosvetnim i kulturnim, politickim i ratnim dogadjajima u Srbiji 1872-1929* [Notes on Education and Culture, and Political and Wartime Events in Serbia, in 1872-1929], Uzice, Uciteljski fakultet u Uzicu, 2009, p. 26 (in Serbian). (Bakic's *Notes* are, in fact, his journal that he kept for as long as 57 years).

³² On student protests in Teacher Training College see, J.S. Jovanovic, *Spomenica pedesetogodisnji pregled rada Prve uciteljske skole od 1871. do 1921. godine* [Fiftieth Anniversary

This is why in April 1877, the government decided to move the college to the capital, Belgrade, in order to have the would-be teachers under closer control. Soon after that, on 24 July 1877, amendments were adopted to the law on the Teacher Training College by which the duration of studies was extended to four years, the boarding school was abolished, entrance exams introduced and several curriculum changes made³³. Vocational education was strengthened by the new programme, logic as a subject was added to psychology and the subject of ethics was introduced, while the number of classes for the group of pedagogy-related subjects and practical training was increased³⁴. The introduction of entrance exams now allowed for the selection of the best candidates. The Teacher Training College in Belgrade was also put in a separate school building, right across the street from the Congregational Church. The ground floor housed a large classroom, laboratories for physics, chemistry and biology, while upstairs were two classrooms, offices for the lecturers and library. The school gymnasium was initially located within the building of the Teacher Training College, but was later moved to the primary school situated near the Congregational Church³⁵.

This was a tumultuous period for the Principality of Serbia: the Serbian-Turkish War of 1876-1878, which marked the Serbian struggle for national liberation, ended with the Congress of Berlin in 1878, which granted the status of an independent state to the Principality of Serbia. Soon, democratic parliamentary life started to develop in Serbia and was from the start characterised by the domination of the so-called radical political movement supported by broad peasant masses. In the last decades of the 19th century, Serbia was still a predominantly agricultural country, with over 90% of the population living off the land, while its industrialisation progressed at a slow and difficult pace as the country's weak economy remained underdeveloped and with poor road and rail networks³⁶.

The year 1878 was also important for teacher education in the Principality of Serbia because of the fact that, in that year, Dr Bakic published his textbook on pedagogy, *The Science of Education*, which is the first textbook of a truly systematic character in Serbian pedagogical literature³⁷. The textbook was used

Overview of the First Teacher Training College from 1871 to 1921], Nis, Stamparija Gutenberg, 1921 (in Serbian).

³³ *Zakon o izmenama zakona o uredjenju uciteljske skole (24. jul 1877)* [Amendments to the Law on the Organisation of the Teacher Training College (24 July, 1877)], in J. Pecic (ed.), *Prosvetni zbornik zakona i naredaba* [Collection of Educational Laws and Ordinances], Belgrade, Drzavna stamparija, 1887, pp. 345-348 (in Serbian).

³⁴ *Ibid.*

³⁵ See Jovanovic, *Fiftieth Anniversary Overview of the First Teacher Training College from 1871 to 1921*, cit.

³⁶ See Corovic, *History of the Serbian Nation*, cit.

³⁷ V. Bakic, *Nauka o vaspitanju* [The Science of Education], Belgrade, Drzavna stamparija, 1878 (in Serbian).

over the next two decades – namely, until 1897, when Bakic published a new one entitled *General Pedagogy*³⁸. When speaking about the pedagogical system that was developed by Bakic, it should be emphasised that he was a genuine follower and critical propagator of Herbart's pedagogy. He defined education as an intergenerational relationship, in which the student activity is the most important goal, and not the means of education. By positioning education squarely on one's personal autonomy, Bakic introduced into Serbian pedagogy the ideas of Kant and Herbart about the educator-student relationship, which was an important step forward in Serbian pedagogical thought. It was only with his concept of education that Serbian pedagogy gained an elaborate pedagogical teleology and an ethics-based theory of education. The centrepiece of Bakic's teaching theory was Herbart's theory of developing a versatile range of interests as well as the requirement to base teaching methods on psychology of learning and on the natural course of the child's development³⁹. He always stressed the importance of autonomy of primary schools in relation to the state and the church, as well as the importance of science-based teaching, which has strongly influenced the professional consciousness of many subsequent generations of teachers⁴⁰.

What changes were effected in the character of primary-school teaching in Serbia after the first generation of students enrolled in the Teacher Training College in Kragujevac? Here, we shall mention a «verbal image» left us by Stanisa Stanisic, the future leader of the Teachers Association. In his memories of the years spent in the primary school near the Congregational Church in Belgrade, which he attended between 1872 and 1876, Stanisic wrote:

They brought to the school new rational methods of work and instilled unusual enthusiasm in schoolchildren. This was in colossal contrast to what our school work used to be like at the time when it was carried out by teachers who used old-school methods, in which spanking, slapping, kneeling, mechanical repetition, cramming, empty-wordiness, whispering, telling on others, napping in class and general inattention played a major role. And all that dull school life in a dusty classroom, within its four walls, with no teaching aids to speak of [...]. How very much different it all was with Miodragovic and Miladinovic who graduated from the first Teacher Training College. [...] Miladinovic would enter the school with a smile, patted us on the head and was always so encouraging. He maintained order and discipline in class by making us all work, play children's games, teaching us interesting things and using engaging examples, all the while taking detailed observations on every child and studying

³⁸ V. Bakic, *Opsta pedagogija* [General Pedagogy], Belgrade, Uciteljsko udruzenje, 1897 (in Serbian).

³⁹ In the period between 1876-1920, Bakic kept a journal on the development of his children and grandchildren. It is the first longitudinal study of child development in Serbia. Entitled *Notes on Children's Physical and Mental Development* the work was published in 2011.

⁴⁰ On V. Bakic's professional career and works see, Vujisic Zivkovic, *Vojislav Bakic and the Development of Pedagogical Science in Serbia*, cit.

each student as an individual [...]. He avoided rote-learning and mechanical repetition, substituting them with gradual acquisition of knowledge and demonstration, and using concentrated teaching, the living word, interesting contents, his unusual diligence and all of his progressive humanity [...]⁴¹.

Male Teacher Training Colleges in the Principality of Serbia 1881-1912

The second Male Teacher Training College in the Principality of Serbia was founded in 1881 in Nis⁴². It was meant to meet the growing needs for trained teachers in Serbia's southern regions, freshly liberated after the Serbian-Turkish war (1876-1878). As of 1887, Jovan Miodragovic (1854-1926) worked as a Professor of Pedagogy at the Teacher Training College in Nis. Miodragovic was a first-generation graduate of the Teacher Training College in Kragujevac, after which he studied pedagogy at the University of Leipzig between 1880 and 1883. Educated in Serbia and Germany, he introduced the «working school» elements into Serbian pedagogy, and, following Pestalozzi's ideas, he incorporated into Serbian didactic the principles of active learning, individualised approach to teaching and adaptation of the teaching content and methods to the developmental abilities of students of different age⁴³.

When in 1882, the *Law on Primary Schools* was passed, introducing compulsory primary education in Serbia⁴⁴, it showed that the two teacher training colleges (in Belgrade and Nis) could not satisfy the need for trained teachers in Serbia. During the eighth decade of the 19th century, the lack of trained teachers in Serbia was still strongly felt: in 1880, there were altogether only 664 male teachers, 107 of whom were graduates of a teacher training college, 194 completed a seminary, 65 only a year or two in a seminary, 16 had full high-school and 145 junior high school, 18 had university degrees in philosophy, 12 graduated from a forestry and agriculture school, while 107

⁴¹ S. Stanisić, *Ucitelj Ljuba Miladinović* [Teacher Ljuba Miladinović], «Ucitelj» [The Teacher], vol. 43, n. 8, 1908, p. 598 (in Serbian).

⁴² *Zakon o ustanovljenju učiteljske škole u Nisu (31. mart 1881)* [The Law on Establishing the Teacher Training College in Nis (31 March, 1881)], «Prosvetni glasnik» [Education Gazette], vol. 2, n. 8, 1881, p. 273 (in Serbian). The school was officially opened on 22 September.

⁴³ Miodragovic was an exceptionally productive writer, he wrote over 200 works, including the following: *Most Common Mistakes in School Teaching and Education* (1894), *The Spirit of Teaching and Education in the Last Quarter of the 19th Century* (1887), *Handiwork in Serbia as a Method of Education* (1900), *Radisa or The sort of a Teacher we Need in the Country* (1910), *Serbian National Pedagogy* (1914). On J. Miodragovic see, V. Nedović, *Pedagoski pogledi Jovana Miodragovića* [Pedagogical Ideas of Jovan Miodragovic], Vrnjačka Banja, Zamak kulture, 1981 (in Serbian).

⁴⁴ *Zakon o osnovnim školama (31. decembar 1882)* [The Law on Primary Schools (31 December, 1882)], «Prosvetni glasnik» [Education Gazette], vol. 4, n. 4, 1883, pp. 41-51 (in Serbian).

teachers had only completed primary school⁴⁵. At the same time, in Hungary, there were 67 teacher training schools (male and female)⁴⁶, whereas in Bulgaria, with which the young Serbian state often compared and even competed, there were three male and one female teacher training schools⁴⁷.

A significant moment for Serbian teaching was the establishment of the Teachers Association in 1881. In January 1882 already, the Teachers Association went public with the first issue of its journal called *The Teacher*, which continued to be published until 1941. As a guild publication, the magazine played an important role in informing and uniting teachers in the struggle to improve their situation, while being at the same time one of the most important pedagogical journals in Serbia⁴⁸.

The continued pressure for more trained teachers and the authorities' belief that teacher-training colleges offered more education than a typical primary school teacher needed to have, led, in 1886, to the adoption of a government decision to reduce the duration of studies at it to three years⁴⁹. The following year, a new curriculum was designed, which reduced the volume of lessons and their content for all subjects⁵⁰.

In the late 19th century, new changes were introduced in the field of teacher education. On 16 March 1895, the Teacher Training College in Nis was merged with the Teacher Training College in Belgrade⁵¹, and, one year later, the duration of teacher-training studies in Belgrade was again extended to four years⁵². Its new curriculum was expanded and the number of classes of all pedagogical

⁴⁵ S. D. Popovic, *Predavanja za ucitelje osnovnih skola* [Lectures for Primary School Teachers], «Prosvetni glasnik» [Education Gazette], vol. 1, n. 2, 1880, pp. 83-87 (in Serbian).

⁴⁶ *Uciteljske skole u Ugarskoj* [Teacher Training Colleges in Hungary], «Prosvetni glasnik» [Education Gazette], vol. 2, n. 8, 1881, p. 310 (in Serbian).

⁴⁷ *Skole u Knezevini Bugarskoj* [Schools in the Principality of Bulgaria], «Prosvetni glasnik» [Education Gazette], vol. 2, n. 9, 1881, p. 428 (in Serbian).

⁴⁸ On the foundation and work of the Teachers Association see, Dj. J. Kojic, S.S. Stanisic, *Spomenica 25 godina zivota i rada Uciteljskog udruzenja* [25th Anniversary of the Teachers Association], Belgrade, Uciteljsko udruzenje, 1906 (in Serbian).

⁴⁹ *Izmene u Zakonu o uredjenju uciteljske skole od 5. oktobra 1870 (31. oktobar 1886)* [Amendments to the Law on the Organisation of the Teacher Training College of 5 October, 1870 (31 October, 1886)], «Education Gazette», vol. 7, n. 22, 1886, pp. 918-919 (in Serbian).

⁵⁰ *Nastavni plan za Uciteljsku skolu u kojoj tecaj traje tri godine (16. oktobar, 1887)* [Curriculum for the Three-Year Teacher Training College (16 October, 1887)], in M. Markovic, R.Z. Popovic (edd.), *Prosvetni zbornik zakona i uredaba* [Collection of Educational Laws and Ordinances], Belgrade, Drzavna stamparija, 1895, p. 677 (in Serbian).

⁵¹ *Raspis kralja Aleksandra I o spajanju uciteljskih skola u Nisu i Beogradu (16. mart 1895)* [King Alexander I's Decree on the Merger of Teacher Training Colleges in Nis and Belgrade (16 March, 1895)], in *Zbornik zakona i uredaba u Kraljevini Srbiji izdanib od 1. januara 1894. do kraja 1896* [Collection of Laws and Ordinances in the Kingdom of Serbia issued from 1 January, 1894, till the end of 1896], Belgrade, Drzavna stamparija, 1899, pp. 334-335 (in Serbian).

⁵² *Zakon o izmenama i dopunama Zakona o uredjenju uciteljske skole od 5. oktobra 1870 (7. februar 1896)* [Amendments to the Law on the Organisation of the Teacher Training College of 5 October, 1870 (7 February, 1896)], «Education Gazette», vol. 17, n. 3, 1896, pp. 65-67 (in Serbian).

subjects increased⁵³. The same year (1896), the Teacher Training College was moved from Belgrade to Aleksinac, reflecting the authorities' desire to put its students, who were mostly sympathizers of the opposition Radical Party, at a safer distance from Belgrade, as the centre of political wrangling.

The Teacher Training College in Aleksinac was housed in a spacious building in the city centre, with four large classrooms, a library and natural science laboratories. The college, however, did not have a boarding school, its teachers came and went too often, leaving the school to accept other posts closer to Belgrade, while its students received very modest stipends. This is how one student described what his life at the Teacher Training College in Aleksinac was like:

Poor as it is, this little town offers to a student very little in terms of opportunity to earn some money. Water is drawn from wells and is unsanitary; the lodgings one can find are little better than dug-outs, small dirt-floor root cellars full of damp [...]. Food is also very expensive considering where and how it is prepared. Students usually eat in small local restaurants, which are unclean and purely Oriental, offering all sorts of meals full of harmful surrogate ingredients [...], a small number of students, those who were really destitute, received meagre assistance of 10-15 dinars [...]⁵⁴.

Until the onset of the Balkan wars in 1912, when the school stopped working, the pedagogical group of subjects at the Teacher Training College in Aleksinac was taught by Petar Despotovic (1847-1917), Jovan Miodragovic and Dr Tihomir Djordjevic (1868-1944). In 1902, Despotovic published his *Historical Pedagogy* – the first textbook on the history of pedagogy after Milicevic published his *History of Pedagogy* in 1871. Despotovic's book is the second of its kind written to assist teacher education in Serbia. Djordjevic, however, introduced, for the time very advanced, ethno-methodological trend in Serbian pedagogy⁵⁵. By the beginning of World War I, a total of 1564 students graduated from Serbia's first teacher training college, which was originally founded in Kragujevac and then moved first to Belgrade and then to Aleksinac⁵⁶.

In 1898, another school of this kind was opened in Serbia – it was the Men's Teacher Training College in Jagodina⁵⁷. The school was well organised and in

⁵³ *Nastavni plan učiteljske škole iz 1896* [The 1896 Teacher Training College Curriculum], «Prosvetni glasnik» [Education Gazette], vol. 17, n. 12, 1896, pp. 457-459 (in Serbian).

⁵⁴ *Učiteljska škola u Aleksincu* [Teacher Training College in Aleksinac], «Učitelj» [The Teacher], vol. 24, n. 8, 1905, p. 541 (in Serbian). (The author remained anonymous.)

⁵⁵ See Jovanovic, *Fiftieth Anniversary Overview of the First Teacher Training College from 1871 to 1921*, cit.

⁵⁶ *Ibid.*, p. 166.

⁵⁷ *Zakon o ustanovljenju Muske učiteljske škole u Jagodini (26. jul 1898)* [Law on Establishing the Men's Teacher Training College in Jagodina (26 July, 1898)], in *Zbornik zakona i uredaba u Kraljevini Srbiji izdanih od 1. januara 1898. do kraja iste godine* [Collection of Laws and Ordinances Issued in the Kingdom of Serbia from 1 January 1898 till the End of the Year], Belgrade, Drzavna stamparija, 1901, pp. 306-307 (in Serbian).

a short time achieved a high reputation in educational circles and among the general public. It had a boarding school for students, workshops (for cardboard production, wickerwork and carpentry), an infirmary and a pharmacy, a farming estate for experiments and on-the-spot instructions (where students at the same time worked the land to get the grasp of typical farm-work and to provide the necessary provisions for the school kitchen), a dining room, kitchen and laundry. The school's particularly distinctive feature was its park with the so-called «outdoor classrooms» – i.e. well-kept gardens in which teaching was held during the summer months⁵⁸.

Sreten Adzic (1856-1933) was the principal of Jagodina Teaching Training College from its inception in 1898 until 1921. A student of Bakic (a 1880-class graduate of the Teaching Training College in Belgrade), he worked for a short while as a teacher before he went on to graduate, in 1884, from the Teacher Training College in Vienna and to get a degree in pedagogy from the University of Leipzig (1886-1889). In the course of his studies, he became acquainted with the idea of handiwork as a subject taught in boys-only primary schools, which he then successfully introduced in the curriculum of both primary and teacher-training schools in Serbia. Adzic was an advocate of the so-called «working school» and developed his pedagogical viewpoints on the criticism of Herbartian pedagogy, which was still strongly present in Serbian pedagogy of his time. Among his scholarly works, those deserving of special attention were a number of his papers notable for their peculiar authenticity: *Handiwork in Boys Primary Schools* (1896) – the first study of this kind in Serbian pedagogy, *Teacher's Notes* (1894) and *Educator's Notes* (1909) – works that we would today describe as reflective diaries, since, in them, Adzic presented both his work and that of other teachers, together with his critical comments and reflections on possible modern ways of teaching⁵⁹.

Serbia entered the 20th century with three Teacher Training Colleges – two men's, in Aleksinac and Jagodina, and one women's, which was launched in 1900, in Belgrade. At the turn of the centuries, Prussia, for instance, had 126 teacher training schools, while Bavaria had 15 of them and Saxony 21 teacher training institutions⁶⁰. It should be stressed, however, that in the period following the establishment of the first men's teacher training school in Serbia and until 1900, the number of students preparing for the teaching profession

⁵⁸ On the work of Teacher Training College in Jagodina see, M. Ristic, *Spomenica Sretenu Adzicu* [In Memory of Sreten Adzic], Jagodina, 1939 (in Serbian).

⁵⁹ On the work of S. Adzic see, N. Vujisic Zivkovic, *Pregled shvatanja srpskih pedagoga o odnosu teorijskog i praktičnog profesionalnog obrazovanja* [An Overview of the Serbian Pedagogues' View of Theoretical and Practical Professional Education], in V. Nikolic (ed.), *Obrazovanje i usavršavanje nastavnika – istorijski aspekt* [Education and Professional Development of Teachers – a Historical Aspect], Uzice, Uciteljski fakultet, 2007, pp. 45-66 (in Serbian).

⁶⁰ *Uciteljske škole u Nemackoj* [Teacher Training Colleges in Germany], «Ucitelj» [The Teacher], vol. 20, n. 3, 1900/1901, p. 247 (in Serbian).

increased many times over: the two male teachers schools were then attended by 211 students (this was at the time when there were 936 boys primary schools with 87,081 students in Serbia)⁶¹.

The new teacher education reform was prepared after the change of dynasty in 1903, when Peter Karadjordjevic came to the Serbian throne⁶². In 1904, a set of new *Rules for Teacher's Exam* was adopted: after two years of apprenticeship, teachers took the final exam that consisted of the writing of an essay on a pedagogical topic and a practical part of the exam, in which the candidate was required to give a demonstration lecture in class⁶³. A new curriculum came into force on 9 March 1905, and was valid for both male and female teacher training schools⁶⁴. By the new curriculum the number of teaching classes was increased for vocational subjects: psychology and logic was taught in the 2nd and 3rd year, general pedagogy only in the 3rd year, while subject specific didactics, history of pedagogy and the so-called school-work (i.e. practical in-school training) in the 4th year.

In addition to this, Dr Bakic established, in 1900, a separate Department of Philosophical and Pedagogical Group of Sciences at the Faculty of Philosophy in Belgrade, where, for the first time in Serbia, university-trained pedagogues received their education⁶⁵. The Department mostly enrolled graduate students of teacher-training schools. During the five years of its existence (1900-1905), the Department of Philosophical and Pedagogical Group of Sciences produced more than 30 graduate pedagogues, who later found work as professors of pedagogy in teacher training schools, or as school supervisors or Ministry of Education officials⁶⁶.

By the beginning of the First Balkan War (1912), another male teacher training college opened, in 1910, in the Serbian town of Negotin. In 1912, the

⁶¹ Cunkovic, *Schools in 19th Century Serbia*, cit., p. 148.

⁶² After the so-called May Revolution of 29 May, 1903, Petar Karadjordjevic came to the throne following the assassination of king Aleksandar Obrenovic.

⁶³ *Pravila o polaganju uciteljskog ispita (21. maj 1904)* [Rules for Teacher's Exam (21 May, 1904)], in *Zbornik zakona od 1. januara 1904. do kraja iste godine* [Collection of Laws from 4 January, 1904 till the end of 1904], Belgrade, Drzavna stamparija, 1906, pp. 421-426 (in Serbian).

⁶⁴ *Nastavni plan za uciteljske skole (9. mart 1905)* [Teacher Training College Curriculum (March 9, 1905)], «Prosvetni glasnik» [Education Gazette], vol. 26, n. 4, 1905, pp. 371-374 (in Serbian).

⁶⁵ Bakic was appointed pedagogy professor at the Belgrade University Faculty of Philosophy in 1892. *PM, Fond dr V. Bakica*, 1892, f. I, br. 26, Beograd, 6. decembar 1892, *Ukaz o postavljenju Vojislava Bakica za profesora Filozofskog fakulteta* [PM, Dr V. Bakic's Fund, 1892, f. I, br. 26, Belgrade, December 6, 1892, Ordinance on the Appointment of Vojislav Bakic as a Faculty of Philosophy professor] (in Serbian).

⁶⁶ On the setting up and the operation of the Department of Philosophical and Pedagogical Group of Sciences see, Bakic, *Notes on Educational, Cultural, Political and Wartime Events in Serbia 1872-1929*, cit. Also see, Vujisic Zivkovic, *Vojislav Bakic and the Development of the Pedagogical Science in Serbia*, cit.

number of students in teacher training colleges (both male and female) stood at 711. At the same time, Serbia had 1425 primary schools with some 145,000 students⁶⁷.

Female Teachers' Education in Serbia in 1863-1912

Having in mind that the first all-girls primary school in the Principality of Serbia was opened in 1845, in Paracin, and that the number of girls in primary schools was far smaller than the number of boys (in the school-year 1857/58, there were 282 boys primary schools with 234 male teachers and 9724 students compared to only 17 girls primary schools, with 22 female teachers and 784 students)⁶⁸, the issue of training female teachers was opened at the beginning of the second half of the 19th century. The training of female teachers in the Principality of Serbia began with the opening, in 1863, of the Advanced School for Women in Belgrade. From its establishment, the school had a two-fold task. *The Law on the Organisation of the Advanced School for Women* of 17 June 1863 stipulated that the school was being established for «[...] the education of young people in skills higher than those taught in primary schools, with the particular aim of preparing more grown-up girls for the job of female teachers in primary schools»⁶⁹. The Advanced School for Women was originally established as a three-year school, but the duration of its studies was extended, in 1866, to four years, in 1875, to five years, and in 1886, to six years⁷⁰.

During its first years of operation, the Advanced School for Women was housed in a private home. In October 1865, however, the school received its own building, which was small and offered substandard working conditions, and, in 1882, was granted the use of an additional building. The school did not have a boarding school, its students came from all across Serbia, but mostly from poor families, and lived in it on modest means, relying on state grants that could not cover even the basic costs of living in the capital⁷¹. The year

⁶⁷ A. Djurovic, *Modernizacija obrazovanja u Kraljevini Srbiji 1905-1914* [Modernisation of Education in the Kingdom of Serbia 1905-1914], Belgrade, Istorijski institut, 2004, p. 329 (in Serbian).

⁶⁸ Cunkovic, *Schools in 19th Century Serbia*, cit., p. 46.

⁶⁹ *Zakon ustrojstva Vise zenske skole (17. jun 1863)* [The Law on the Organisation of the Advanced School for Women (17 June, 1863)], in *Skolski zbornik zakona, pravila i naredaba* [School Collection of Laws, Regulations and Ordinances], cit., p. 150 (in Serbian).

⁷⁰ On the work of the Advanced School for Women in Belgrade see, K. Cvetkovic, *Visa zenska skola u Beogradu – pedesetogodisnjica 1863-1913* [The Belgrade Advanced School for Women – Fiftieth Anniversary 1863-1913], Belgrade, Stamparija Dositej Obradovic, 1913 (in Serbian).

⁷¹ *Ibid.*

1891 saw the establishment of another Advanced School for Women, this time in Kragujevac, which was administered by Advanced School for Women in Belgrade.

Initially, female teachers could only work in all-girls primary schools, until a decree was passed on 12 October 1870 by the Minister of Education and Religious Affairs that allowed female teachers to work in the first grade of boys primary schools too⁷². There were also some fundamental differences in the status and curricula of female and male teacher-training schools: boys enrolled in teacher training colleges after graduating from junior high school, while girls enrolled in their Advanced School for Women after completing primary school; the range of vocational subjects taught at teacher training colleges included general pedagogy, subject specific didactics, history of pedagogy, psychology and the so-called school-work (i.e. practical in-school training), while the range of pedagogical subjects taught at the Advanced School for Women comprised only pedagogy and teaching methods, and school-work. In addition to general subjects, female students also had special «female subjects» such as women's handiwork, dance and cooking.

The first rules regulating teacher's exams for prospective female teachers were passed on 26 November 1871⁷³. Future teachers first took oral examinations in all subjects read at the Advanced School for Women and then had to write an essay in order to assess their level of proficiency in the Serbian language. The set of rules that harmonised the exams for male and female teachers came into force on 23 May 1883⁷⁴. This kind of adjustment was necessary because the number of girls in primary schools increased steadily and because female teachers were more and more frequently hired in male primary schools. However, the number of female teachers in Serbia was not growing at a pace that would threaten the dominance of male teachers. In the school-year 1869/70, there were 303 male primary schools with 487 male teachers and 39 female primary schools with 63 female teachers. Ten years later, there were 558 male primary schools with 664

⁷² *Raspis kneza Milana Obrenovica (12. oktobar 1870)* [Prince Milan Obrenovic's Decree (12 October, 1870)], in *Zbornik zakona i uredaba izdani u Knjazestvu Srbiji za 1872* [Collection of Laws and Ordinances in the Principality of Serbia for 1872], Belgrade, Drzavna stamparija, 1872, p. 156 (in Serbian).

⁷³ *Pravila o polaganju uciteljskog ispita za ucenice Vise zenske skole (26. novembar 1871)* [Rules for Teacher's Exam for Students of the Advanced School for Women (26 November, 1871)], in *Skolski zbornik zakona, pravila i naredaba* [School Collection of Laws, Regulations and Ordinances], cit., pp. 207-209 (in Serbian).

⁷⁴ *Pravila o polaganju uciteljskog ispita za ucenice Vise zenske skole (23. maj 1883)* [Rules for Teacher's Exam for Students of the Advanced School for Women (23 May, 1883)], in Pecic (ed.), *Prosvetni zbornik zakona i naredaba* [Collection of Educational Laws and Ordinances], cit., pp. 516-521 (in Serbian).

male teachers and 56 female primary schools with 112 female teachers. Finally, in the late 19th century, there were 936 male primary schools with 1644 male teachers and 165 female primary schools with 296 female teachers⁷⁵.

Following the establishment of the Advanced School for Women, debates in the professional community intensified as regards the character of female teacher training. The first proposal for the «reorganisation» of the Advanced School for Women into a Women's Teacher Training College was developed in 1880 by Dr Bakic⁷⁶, but was not adopted by the Ministry of Education. Opposition to the restructuring of the Advanced School for Women was based on the fact that any reform of this school was directly related to the question of the organisation of secondary education of girls in general. The first Women's Grammar School in Serbia was opened in 1905, in Belgrade⁷⁷, so that the two advanced schools for women (in Belgrade and Kragujevac) were the only state schools for girls with secondary-school status. Dr Bakic continued to work on establishing a women's teacher training school. Thanks to his initiative, amendments to the law on teacher training colleges were adopted on 7 February 1896, which provided for the establishment of a true female teacher training school⁷⁸. The implementation of this provision followed in 1900 when a total of 80 candidates applied for first-year studies at the Women's Teacher Training College. After reviewing the applicants' previous school reports and after their physical examination and hearing tests were conducted, 30 girls were admitted to the school⁷⁹. Following its establishment, the Women's Teacher Training College in Belgrade based the programme of its studies on the curriculum used in male teacher training schools⁸⁰. The school's first principal, pedagogue Ljubomir Protic (1866-1928) was an avid advocate of Herbartian pedagogy, while another of the «Serbian Herbartians», Dr Stevan Okanovic (1871-1917), briefly (1913) taught pedagogy at this school. In the period between 1900 and 1906, one of the School's lecturers was Sreten Pasic (1858-1909), a proponent

⁷⁵ Cunkovic, *Schools in 19th Century Serbia*, cit., pp. 82, 126, 148.

⁷⁶ The proposal was discussed by the High Council on Education. 44. *sastanak Glavnog prosvetnog saveta* (19. mart 1881) [The 44th Session of the High Council on Education (19 March, 1881)], «Prosvetni glasnik» [Education Gazette], vol. 2, n. 4, 1881, pp. 239-240 (in Serbian).

⁷⁷ *Ukaz kralja Srbije Petra I* (29. jun 1905) [Decree of Petar I, King of Serbia (29 June, 1905)], «Prosvetni glasnik» [Education Gazette], vol. 26, n. 8, 1905, p. 123 (in Serbian). This ordinance orders the opening of four senior grades of Women's Grammar School which, combined with four lower grades of the Advanced School for Women, will make up for a full-scale women's grammar school.

⁷⁸ *Izmene i dopune zakona o uciteljskoj skoli* (7. februar 1896) [Amendments to the Law on the Teacher Training College (7 February, 1896)], «Prosvetni glasnik» [Education Gazette], vol. 17, n. 3, 1896, p. 65 (in Serbian).

⁷⁹ *Otvorjanje Zenske uciteljske skole u Beogradu* [Opening of the Women's Teacher Training College in Belgrade], «Prosvetni glasnik» [Education Gazette], vol. 21, n. 11, 1900, p. 779 (in Serbian).

⁸⁰ In 1903, the Advanced School for Women in Kragujevac evolved into a Women's Teacher Training College.

of the new experimental pedagogy and the founder of the Serbian Society for Child Psychology in 1907⁸¹. In the last school-year before the outbreak of World War I, a total of 52 girls graduated from the Women's Teacher Training College in Belgrade⁸².

Conclusion

The first male teacher training college in the Principality of Serbia was founded in 1871, in Kragujevac. The belated institution of the teaching school had its reasons in the specific historical circumstances of the time: it was only in the 1830 that the Principality of Serbia, as a vassal state of the Ottoman Empire, was granted the right to independently organise its national schooling system, gaining full independence in 1878. On the other hand, as a predominantly agrarian country with a relatively weak economy, Serbia was faced, throughout the 19th century, with the problem of devising ways to fund its schools, from primary schools to universities. Until the early eighties of the 19th century, primary school teachers were typically those who had graduated from seminaries, grammar schools, or the Serbian Teacher Training School in Sombor, but there were also a lot of teachers who had completed only a year or two of seminary, grammar school or just primary school.

In the 19th and the first decade of the 20th century, male teacher training schools in Serbia had the status of senior high schools (that students enrolled in upon completing junior high school), while advanced schools for women, which trained female students for the teaching profession, initially had the status of junior high schools before acquiring the status of so-called «full» high schools (and were enrolled in after completion of primary school). When, in 1900, the Advanced School for Women in Belgrade transformed into the Women's Teacher Training College, it too was granted the status of a senior high school. Moreover, while in the 19th century Serbia had a lot of difficulty training a sufficient number of skilled teachers, this problem was finally and fully resolved only in the first decade of the 20th century, when the number of teachers increased multifold.

The programme of training teachers in the period observed saw relatively frequent modifications, with most of the changes going in the direction augmenting teacher training with new subjects from the field of pedagogical

⁸¹ In 1907, the Society launched «Serbian Child Psychology Society Herald», a journal that was published for the following three years.

⁸² R. Rakic, *Vek učiteljske škole i decenija Pedagoške akademije* [A Century of the Teacher Training College and a Decade of the Pedagogical Academy], Belgrade, Pedagoška Akademija, 1983, p. 95 (in Serbian).

science, on the one hand, and improving the general education of future teachers and adapting their curriculum to converge more closely with that of classical grammar schools, on the other. Subjects from the educational field typically included general pedagogy, history of pedagogy, general didactic, subject specific didactics and psychology. Practical training was carried out as part of the so-called «school-work», with its chief characteristic being a gradual increase in the number of teaching hours for the practical training of teachers.

With the establishment of teacher training schools in Serbia, the quality of teaching was changed and improved as the new breed of trained teachers introduced new and, for the time, modern teaching methods in primary schools, such as the use of teaching aids in demonstration, teaching in which students became active learners who acquired new knowledge with understanding and in which age-specific developmental characteristics of children were given full consideration.

In the last decades of the 19th and in early 20th century, pedagogical literature in the Serbian language was significantly enriched and expanded, pedagogical periodicals introduced and a professional association of teachers established. It should also be emphasised here that Serbian pedagogy initially developed primarily for the purposes of teacher education. The first lecturers in pedagogy at teacher training schools and advanced schools for women had completed only teacher training schools in European countries, after which the schools started to employ as lecturers those who had obtained degrees in pedagogy at European universities. In the 19th century, teachers trained in the spirit of Herbartian pedagogy were dominant, while in the early 20th century, they were gradually superseded by teachers educated in the spirit of the so-called «working school» and experimental pedagogy. Thanks to the high and comprehensive education that teachers received at teacher training colleges in the period between 1900 and 1905, they were granted the right to enrol in the Department of Philosophical and Pedagogical Group of Sciences at Belgrade University, which produced the first university-educated pedagogues in Serbia.

The position of teachers in Bosnia and Herzegovina during the Austro-Hungarian Monarchy

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ABSTRACT: When Bosnia and Herzegovina became a part of the Austro-Hungarian Monarchy, its population was almost completely illiterate. Therefore, the new authority started to open elementary schools gradually, because of the problems with local population of different religious. The lack of teachers was evident. Seven schools for teacher's education were opened in Sarajevo, Mostar, Banja Luka and other places in BiH in this period of time (1878-1918). First teachers were officers, then teachers from the Monarchy and later on local people who finished schools in Zagreb, Belgrade, Wien, Graz, Prague and Pesta. Position of teachers during the rule of the Austro-Hungarian Monarchy was not encouraging. Teachers were supposed to be experts in many fields and had so many obligations and duties, but still they were not considered as the state employees. They asked to be equal with them, but the authority denied their requests. Therefore, material position of teachers was not very good. They had low salaries and were sent to distant villages to be teachers there. They needed to have knowledge related to agriculture in order to support peasants and to modernize their work. Female teachers were in a worse position because of the legal regulation that prohibited their rights to get married. They could be married only to their colleagues, but their salaries would be smaller. This was relevant to all parts of the Monarchy. Nevertheless, teachers succeeded in their human task educating children and fighting for the better future. Schools that were built and functioned in this period proved their strength and stubbornness. Teachers were those who founded teachers' associations in order to improve their own position. They also edited magazines writing down about their professional position and asking for their rights and better working conditions.

EET/TEE KEYWORDS: Teacher Education; Training Centre; Teacher Role; Social Perception; Women's Work; Bosnia; XIX-XX Centuries.

This study presents the principal modification of the educational policy and school system in Bosnia and Herzegovina. After the long domination of the Ottoman Empire, Bosnia and Herzegovina faced a new Empire, the Habsburg

one. Gaining Bosnia and Herzegovina as a new territory of the Habsburg Monarchy was ratified on June 28, 1878 at the Berlin Congress which obliged the new authority to implement a new model of governing within a modern administrative system which had to be slowly applied to the local setting.

The fact that after the historical rearrangement and change of government, a new style of governing appeared in Bosnia and Herzegovina indicating the elemental demand on the complete change of the peoples usual behaviour and way of life. In contradiction to the practice of the Ottoman Empire that did not care for education and where schools functioned without any laws or regulations, on a voluntarily basis, new education policies appeared which disturbed the local population. The reason for this was in the new authority's brave plan concerning the complete reorganization of economic, political, and educational situation in the country¹.

During the Ottoman Empire, Bosnia and Herzegovina was a backward agrarian country. The majority of the population lived in villages in a very primitive way. Rare schools that existed at that period of time were not systematically organized. These schools were of a confessional character, built near churches, monasteries or mosques. The Ottoman Empire tolerated the work of these schools and only occasionally referred to their work, but without any intention to open state schools in order to educate the local population. The population of Bosnia and Herzegovina lived in a spirit of mutual suspicion and distrust at that time. This did not change with the new authority, the opposite occurred.

In the field of education and schooling, the new authority had to deal with an extremely high degree of illiteracy (97%), a poorly organized network of divided confessional schools and the lack of educated teachers. Furthermore, teacher education had not yet been organised. All the efforts of the new authority were concentrated on the transformation of the existing confessional schools, where they were forced to reach a compromise establishing a system of teacher education under state control. Their first intention was not really welcomed by the local population. Firstly, the teachers were officers, then teachers from the Monarchy and later on local people who finished schools in Zagreb, Belgrade, Wien, Graz, Prague and Pesta².

The intention of the legislation in connection with the modification of the school policy was followed by intensive efforts which included the idea of public schools set apart from the confessional ones. The Austro-Hungarian authority

¹ V. Bogicevic, *Istorija razvitka osnovnih škola u Bosni i Hercegovini* [History of elementary school development in Bosnia and Herzegovina], Sarajevo, Institute for school publishing BiH, 1965, pp. 54-55.

² E. Protner, Z. Medves, S. Batinic, S. Miovska Spaseva, I. Radeka, V. Spasenovic, S. Susnjara, V. Zoric, N. Vujisic Zivkovic, *The Development of Teacher Training in the States of Former Yugoslavia*, in H. Nemeth, E. Skiera, *Lehrerbildung in Europa. Geschichte, Struktur und Reform*, Frankfurt am Main [etc.], Peter Lang, 2012, pp. 239-265.

promoted the strict control of schools. The new authority considered that it had exclusive rights to observe, control and implement curriculum, books, and especially concerning the observation of teachers and their influence within the local population. This requirement of strict governmental control was not welcomed by the local population, especially the Muslim one. They looked at the new authority without trust. In order to avoid misunderstandings, the authority made some exceptions and the Muslim confessional schools continued to work and even new schools for the Muslim population were opened such as the Sibjan-Mektebi (a sort of a Muslim elementary school). There were 1,233 Sibjan-Mektebs with 53.069 students in 1915³.

The first elementary public schools

The Austro-Hungarian Monarchy attempted to organize schools following the pattern that prevailed in the whole Monarchy. With the Regulation from June 6th 1879, which especially emphasized that elementary school education was under the state control, the main effort and push occurred in the organization of primary school and teacher training. The regulation had the purpose to create a basis for further educational prosperity. In order to solve educational issues, the reform of the complete schools system was necessary, but the lack of professional teachers was a substantial problem. Therefore, the new authority decided to open new schools wherever this was possible not taking into consideration the religious orientation of children⁴.

However, in Bosnia and Herzegovina there were confessional schools in towns which were fairly well organized. It was not possible for the new authority to organize schools that would reach the quality of existing confessional school where educated teachers worked. For this reason, new schools were opened in the areas without schools, mostly in rural regions where officers were appointed as teachers. In the towns, public state schools were organized in the similar way as the confessional ones. Therefore, the elementary school system was not unified, but the opposite it was more as a dual elementary system with town's schools and schools in villages⁵.

The opening of the first elementary public schools was very slow. The first schools were opened in the place of the previous confessional schools or some

³ M. Bevanda, *Pedagoska misao u Bosni i Hercegovini, 1918-1941* [Pedagogical Thought in Bosnia and Herzegovina], Sarajevo, Filozofski fakultet Univerziteta u Sarajevu, 2001, pp. 42-43.

⁴ A. Jovanovic, *Prvi jubilej bosanskoga školstva* [First Jubilee of Bosnian Schooling], «*Skolski Vjesnik*», n. 6, 1904, p. 321.

⁵ M. Papić, *Školstvo u Bosni i Hercegovini za vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hungarian Occupation (1878-1918)], Sarajevo, Veselin Maslesa, 1972, pp. 45-53.

other rooms were adapted for this purpose. Statistics show that 143 schools were built in the period from 1882-1891. In average, five schools were built per year which was not enough according to the number of children⁶. Later on, new schools were opened in the region where there were conditions for this step (enough number of pupils, appropriate buildings and teachers). School buildings mostly consisted of the main elements of a water pump, apartments for teachers and a garden for practical teaching⁷.

In the beginning of organized elementary teaching in distanced areas, it was regulated that the teaching process would last only 2-3 hours per day. All these facts influenced the quality of education and social attitudes towards it⁸. Teaching was organized in the simplest way with the aim to achieve success in elementary literacy. In the schools organized in the rural regions, children were taught how to read, write and calculate and the first teachers were officers from the Monarchy. This uncovered a new problem, the lack of educated local teachers⁹.

The first elementary schools which were opened in the villages were poorly equipped with unclearly formulated tasks and goals for elementary schools, and did not accomplish the basic needed function or organization. From 1881 onwards after the era where officers taught in these schools because they had some sort of teacher's education or had completed some year of teacher's school, a big change in teaching staff appeared. Only officers who had adequate teacher's education were kept on this position while the rest of military staff was replaced by qualified teachers¹⁰.

Sarajevo as the capital city had male and female elementary public schools in 1880/81. Male school counted 125 pupils and female 75 pupils. If we compare this number with the number of inhabitants, the contrast is obvious. According to the Census, Sarajevo had 14,848 Muslim inhabitants, 3,474 Orthodox and 698 Catholics, total 19,293 in 1879. This only proved the previously mentioned distrust of the population and suspicious towards education¹¹.

Only Sarajevo, Travnik, Banja Luka and Bihać established elementary schools with common four grades¹².

⁶ *Ibid.*

⁷ *Ibid.*

⁸ Jovanovic, *Prvi jubilej bosanskoga školstva* [First Jubilee of Bosnian Schooling], cit., p. 321.

⁹ *Ibid.*

¹⁰ N.N., *Promjene u organizaciji školstva u Bosni i Hercegovini* [Changes in School Organization in Bosnia and Herzegovina], «Skolski Vjesnik», n. 1-4, 1909, p. 1.

¹¹ Jovanovic, *Prvi jubilej bosanskoga školstva* [First Jubilee of Bosnian Schooling], cit.

¹² N.N., *Promjene u organizaciji školstva u Bosni i Hercegovini* [Changes in School Organization in Bosnia and Herzegovina], cit.

The financing of schools

Schools were financed by the municipality and the government. The law of founding, maintaining and observing educational institutions and children's education was brought forth in 1913. The law declared that: «Every rural and urban municipality is due to found and keep public schools on their own account. Municipalities which are not able to found and maintain schools on their territory will get support from state sources»¹³.

At the beginning, municipalities were small territorial and administrative units and they usually co-operated together in such a way that children from two schools went to one school building in order to minimize costs. This was the first step in creating schools in municipalities. The law of public education declared the establishment of a School Board. Therefore, the School Board in town schools consisted of honourable citizens such as the mayor, four literate citizens chosen by the municipal commission, the school principal, the priest and the school doctor. The importance of this Board in the villages proved the fact that this Board was made up of the prince of the village, three literate persons (if possible), and principal of the school. The Common School Board was made up with the princes (*muktari*) and one person from each municipality. This Board controlled the registration of children in the school, their attendance and issues related to school maintenance¹⁴.

Teaching programs

The first schools opened by Austria-Hungary were adapted to the needs of the Bosnian and Herzegovian population. This meant that children were taught to read and write in the Latin and Cyrillic alphabet. They also learnt the German language. Sunday and Friday were in general the school holidays. Students were also free of school during the determined holidays related to their religion. School started on September 1st and finished on June 30th. The Authorities undertook the effort to ensure conditions for every child in order to get a proper education no matter what their religion was. Elementary schools were firstly opened for children from the age of 6 to 12, but exceptions were more or less tolerated. The continuation of education depended on the political structures and their further arrangement of the school system. The regulation

¹³ *Journal of Laws and Commands for Bosnia and Herzegovina*, Sarajevo, State printing house, 1913, p. 83.

¹⁴ *Ibid.*

from 1879 clearly demonstrated the will of the Austro-Hungarian authority for further modernization of educational work as well as realization of giving the opportunity for achieving qualitative education¹⁵.

In the four elementary public schools with the same four grades which were opened in 1880 in Sarajevo, Travnik, Bihac and Banja Luka qualified teachers worked. The curriculum of these schools differed from the curriculum of schools where officers taught. The reason for this was the presence of confessional schools in towns which followed the advanced curriculum and the Authority wanted these public schools to be at least equal to them if not better. Subjects in these schools were: Bosnian-state language, religion, mathematics, geography, history, natural sciences, geometry, music, physical training, agriculture, nice writing, economy, female hand-work. In the 3rd and the 4th grade pupils had the German language¹⁶.

Finally, the Government proclaimed the Act of determining the organization of public elementary schools in 1909. This Act predicted the program of school work which clearly emphasized the goals of the teaching process and contents in accordance with the subjects taught.

The language of teaching was also a sensitive matter that needed to be taken into serious consideration. In connection with the three main different ethnic groups that lived in this region, the issue of education was accompanied by the suppressed and badly managed national problems. These unsolved ethnic problems made the situation more complex. Therefore, the name of language was an issue of distrust and confusion. At first, the language was named as Croatian (1879), later on the name was state language and then Bosnian. The government excluded the use of Croatian and Serbian as the name for the language in order to suppress any national awareness. However, in 1907, after a series of correspondence and objections from the local population and intellectuals, it was finally agreed that the language would be named as Serbo-Croatian. Cyrillic and Latin alphabets were compulsory in schools from 1880. In the schools with pupils who came from Muslim and Catholic families, the Latin alphabet was learnt first while in schools with an Orthodox majority the situation was the opposite¹⁷. Furthermore, the new authority attempted to avoid this misunderstanding promoting an attitude of tolerance as a pedagogical measure within public schools. They wanted to create a new non-national

¹⁵ V. Bogicevic, *Istorija razvitka osnovnih skola u Bosni i Hercegovini* [History of elementary school development in Bosnia and Herzegovina], Sarajevo, Institute for school publishing BiH, 1965, pp. 157-158.

¹⁶ M. Papic, *Skolstvo u Bosni i Hercegovini za vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hungarian Occupation (1878-1918)], Sarajevo, Veselin Maslesa, 1972, p. 43.

¹⁷ *Papic, Skolstvo u Bosni i Hercegovini za vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hungarian Occupation (1878-1918)], cit., pp. 55-58.

spirit amongst children and the local population implementing the Bosnian language and Bosnian nation, but this only provoked a negative reaction and disagreement¹⁸. By taking the above mentioned factors into consideration, we can come to the conclusion that the educational polices and new government together with teachers placed in this context faced fundamental social and national problems. This did not ease the teachers' professional work. On the contrary, this resulted in different internal structural solutions in elementary schools.

School organization and functioning

According to official plans, it was expected that public elementary schools would admit the largest number of children possible but this was not the case. A number of children still went to confessional schools and a significant number of the older children did not attend school at all. As Bogicevic claimed, the reasons differed, from religious to political¹⁹. Furthermore, people did not understand the purpose of education. There was still not any law for education which could force parents to send their children to schools.

As already emphasized, schools were organized and functioned following the example of schools in the Monarchy. However, the region of Bosnia and Herzegovina was a specific one and a new school system had to be adapted to ensure situation and material conditions which were not the most beneficial. Thus, the Government declared Basic regulations related to the organization of public schools in Bosnia and Herzegovina in 1879. There was also an idea concerning male and female pupils, suggesting that male teachers should teach male pupils and the opposite. This was done because of the Muslim female population and their entering into schools. Naturally, this request was rejected. The lack of teachers was evident and it was claimed that such practice did not exist in the entire Monarchy²⁰. However, Bosnia and Herzegovina was a completely different part of Monarchy and this had to be taken into consideration.

In accordance to the specific situation in the country, the Government attempted to, if the economic situation allowed, set up independent elementary public schools for girls or separated classes within mixed schools. This was explained with practical reasons, such as domestic subjects only for girls, or

¹⁸ Bogicevic, *Historija razvitka osnovnih skola u Bosni i Hercegovini od 1463-1918* [History of Elementary School Development in Bosnia and Herzegovina 1463-1918], cit., pp. 168-169.

¹⁹ *Ibid.*, p. 151.

²⁰ Papic, *Skolstvo u Bosni i Hercegovini za vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hungarian Occupation (1878-1918)], cit., p. 61.

handy work. This would also be a great opportunity for Muslim girls to come to school freely. It was also guaranteed that girls would be seated in the front seats. Teachers got instructions to be polite and observe «in order to prevent any event that could hurt the natural modesty and vulnerability of female children»²¹.

Schools were classified as one or more classes. The term class introduced a room where a group of pupils were sitting but not only one grade. Teaching for smaller number of pupils was organized in a way that four grades were sitting together in one classroom and therefore, this school was titled as one class school. In the situation when pupils were taught in two rooms that school was called a two class school²².

Schools were properly equipped. From 1879, every primary school had a map of Bosnia and Herzegovina accustomed for classroom use. Later on, schools got a map of Austro-Hungarian Monarchy. The big table dominated in the classroom. Pictures on the walls were helpful tools to teachers while teaching the flora and fauna. For teaching Chemistry or Physics, teachers were ensured reliable equipment. Drawing books and notebooks were given to pupils free of charge. Furthermore, every pupil had his/her own stone table for writing and sweeping. The teacher's association attempted to remove these stone tables from school practice, but unsuccessfully. This equipment was in use even in the period after the Austrian-Hungary stopped ruling Bosnia and Herzegovina.

Some schools had libraries with books recommended by the Government. Furthermore, the Government declared an Act in 1902 defining which books and magazines were allowed for use in schools as well as which book should be awarded to pupils.

Pupils who completed four grades school received a diploma from the elementary public school, after the exam held in front of an official commission. Pupils from lower grades only received a certificate with the total score of their exam results.

Physical punishment was exercised in the schools. Beatings with whips or straps used as a form of punishment for pupils were present everyday with parental blessing. The fighting against this form of punishment declared by European pedagogues did not find fertile soil in Bosnia and Herzegovina even though articles related against this practice were published in the local pedagogical magazine²³.

²¹ *Ibid.*, pp. 61-63.

²² Bogicevic, *Historija razvitka osnovnih skola u Bosni i Hercegovini od 1463-1918* [History of Elementary School Development in Bosnia and Herzegovina, 1463-1918], cit., p. 158.

²³ Papic, *Skolstvo u Bosni i Hercegovini za vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hungarian occupation (1878-1918)], cit., pp. 63-65.

Bogicevic claimed that there were 216 public elementary schools in Bosnia and Herzegovina in the 10 years after the arrival of Austro-Hungarian Empire, in 1889. At the end of 1913, the number of schools increased to 568 elementary schools (public, private and confessional)²⁴.

Teacher training schools

The first official information regarding a reference who can be evaluated as a teacher was published in the Regulation related to the organization of elementary schools in the towns. This was: «Teacher service is accessible to all members of Bosnia and Herzegovina, no matter of their religion, as well as to all citizens of the Monarchy. They need to be capable to work as teachers and to possess a good moral and political character»²⁵.

The first state three year teacher training school was brought in under the rule of the new regime in Bosnia and Herzegovina in 1882. This school was developed into a four year teacher training school for men in 1886, which followed the prescribed programme for the teacher school that prevailed in the entire Monarchy. The level and duration of the fields of teacher's training were mainly similar in the countries of the Monarchy. This training occurred in local elementary schools where observed lessons and practice lessons for the student's teachers took place²⁶.

Apart from pedagogy, students had the following subjects: catechism, the Bosnian-state language, German language, mathematic and geometry, history and geography, biology, economy, drawing, writing, singing, piano, organ and violin lessons, gymnastic exercises²⁷.

In this respect the favourable tendency demonstrated with the change and real option of achieving a quality level of education could be observed. Another factor was the lack of satisfactory conditions for elementary education. The increase of the tasks of the teaching stuff and the present decrease of teachers did not make teachers' work easier. However, the authority continued their action in creating conditions for opening more state schools that could compete with confessional ones.

²⁴ V. Bogicevic, *Pismenost u Bosni i Hercegovini* [Literacy in Bosnia and Herzegovina], Sarajevo, Veselin Maslesa, 1975, pp. 284-286.

²⁵ Papić, *Školstvo u Bosni i Hercegovini za vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hungarian occupation (1878-1918)], cit., p. 73.

²⁶ Protner, Medves, Batinić, Miovska Spaseva, Radeka, Spasenović, Susnjara, Zorić, Vujić Zivković, *The Development of Teacher Training in the States of Former Yugoslavia*, cit.

²⁷ *First Annual Report of Teacher School in Sarajevo*, Sarajevo, State printing house, 1889, pp. 5-6.

After the establishment of the teacher training school, the government realized that students were coming from rather poor families and were not able to ensure adequate accommodation for them. One teacher commented that the teacher profession was not popular at all and teachers were very poorly paid. «As it is case everywhere, it is the case here as well, who else would sacrifice life and being tied up to the teacher vocation but poor people!»²⁸.

In order to improve the teachers' position, to make it more attractive, the authority offered scholarship for future teachers but this was insufficient. The students still had inappropriate accommodations and their medical status was not promising. Thus, the authority decided to build a dormitory near the river Miljacka in Sarajevo for 50 students, which was opened in 1886²⁹. Apart from the scholarship guaranteed by the government, National Cultural and Educational Associations Napredak, Prosvjeta and Gajret, they also provided scholarships for students. Thanks to these associations, many intellectuals and teachers of that period of time succeeded in completing their schooling³⁰.

Other teacher training schools

In 1884, The Catholic Congregation *Daughters of God's Love* got permission to open a private three year female teacher training school in the Institution of St. Joseph. The school was open for all female students regardless of their confession. Three year teacher training school changed the duration several times. Four year training was formalized very soon and last until 1899, but after 1900 it was transformed to five years school. This was the first complete teacher training school which followed the teacher training program from the Monarchy. In order to enter into this school, students had to have a degree from a higher school for girls. School staff consisted of 11 female teachers and one priest. This school was appreciated by the authorities because their female teachers were educated abroad and were competent and professional.

In 1884/85, the course for female Muslim teacher's training was opened in Sarajevo. Students who finished higher school for girls were able to attend this course³¹.

In the beginning of 1886, the Training for assistant teachers was transformed into the first regular teacher's school. This presented the end of one period and

²⁸ *First Annual Report of Teacher School in Sarajevo*, Sarajevo, State printing house, 1910, pp. 7-9.

²⁹ *Ibid.*

³⁰ Bevanda, *Pedagoska misao u Bosni i Hercegovini, 1918-1941* [Pedagogical Thought in Bosnia and Herzegovina], cit., pp. 46-47.

³¹ *Ibid.*, p. 45.

beginning of the new period, the one where local teachers entered the scene³². Students who finished this school worked as assistant teachers and after two years on this position they needed to pass exam tests in front of the Educational Board. This was the first phase of institutionalized education of teachers in Bosnia and Herzegovina. These two schools mentioned above presented the beginning of a systematic, organized education and training of future teachers in Bosnia and Herzegovina³³.

The management and teaching process in this Teacher Training School was given to experienced teachers who worked in elementary schools and later on in higher schools. Thanks to their rich pedagogical experience, it was considered that these teachers would improve the education of future teachers, their work with children and school work. The complete teaching process of the school was under the constant control of the State government.

A large amount of attention was given to agricultural and domestic education. To get knowledge from this field, students spent some time in the school garden where they got basics related to fruit production, beekeeping, gardening and other branches of agriculture. The aim of this program was to encourage the village population to cultivate new cultures, with teachers as assistants and advisers.

During their studies, candidates led by subject teacher performed their own lessons in elementary school while in the other semester, in the last third grade; they were obliged to teach independently in every grade of elementary school in the duration of one week. Daily excursions prescribed by the curriculum were often practiced. Therefore, students went on excursions 15 times a year. At the end of every school year, candidates had final exams, written and oral. A Commission was advocated by the State government. The school subjects studied in the year were a part of the exam. At the end of the third year the exam consisted of subjects from all three grades³⁴.

In 1887, the Government introduced a regulation related to the official teacher exam which was called the «definitive exam». The commission and the program for the exam were appointed by the given regulation. For the written exam candidates needed to show knowledge of their maternal language, mathematic and other subjects. Knowledge of teaching material for elementary school was practically presented during the oral exam. Candidates also needed to present practical work in the classroom³⁵.

³² Bogicevic, *Historija razvitka osnovnih skola u Bosni i Hercegovini od 1463-1918* [History of Elementary School Development in Bosnia and Herzegovina, 1463-1918], cit., p. 161.

³³ *First Annual Report of Teacher School Sarajevo*, Sarajevo, State printing house, 1889, p. 6.

³⁴ Papić, *Školstvo u Bosni i Hercegovini za vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hungarian Occupation (1878-1918)], cit., p. 91.

³⁵ *Ibid.*, p. 74.

Candidates from private teacher schools also had to take that exam together with candidates from the male teacher training school³⁶.

It is important to mention that at the end of school year 1888/89, the four year Teacher training school in Sarajevo had 12 lecturers. They were either permanent or part-time teachers in the Teacher training school and in the elementary schools. At that time it was declared: «To become a regular teacher in the teacher training school a candidate needs to have a minimum of formal teacher training skills for working in public schools and required practice in an elementary school»³⁷.

As Bosnia and Herzegovina needed highly educated local teachers who would work in an official position in educational management and would lead other colleagues through educational process, the State government decided to send a certain number of teachers to the Pedagogical Institute in Wien in 1890. Thanks to this decision, Bosnia and Herzegovina then had several experts capable to promote and modernize the local school system³⁸.

The state female teacher training school in Sarajevo was opened in 1911. This school followed the same curriculum as the male teacher training school, with the exception of practical subjects introduced only for girls. There were 84 students in this school (42 Serbo-Orthodox, 36 Catholics, 4 Jewish and 2 from an Evangelic religion)³⁹.

The second teacher training school was opened in Mostar in 1913/14 but this school was transferred to Derventa together with the school in Sarajevo because of the war. The school functioned as mixed school until 1926 when it was closed⁴⁰.

Great emphasis was laid on pedagogical contents in all these schools as well as methodises of classroom work. All schools in the Monarchy followed this logic. Pedagogy was studied in every grade and the number of these lectures was maximized in the higher grade. Special methodical and practical classroom work were the subjects of third and fourth grade. The student's duty was to promote compulsory classroom work in one school per month⁴¹.

³⁶ *Fifth Annual Report of Teacher School in Sarajevo*, cit., p. 27.

³⁷ *Eighteen Annual Report of Teacher School in Sarajevo*, Sarajevo, State printing house, 1910, pp. 4-5.

³⁸ M. Papić, *Tragom kulturnog nasljedja* [Following the Cultural Heritage], Sarajevo, Svjetlost, 1976, p. 78.

³⁹ Papić, *Školstvo u Bosni i Hercegovini za vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hungarian Occupation (1878-1918)], cit., pp. 98-99.

⁴⁰ *Ibid.*, p. 100.

⁴¹ Bevanđić, *Pedagoska misao u Bosni i Hercegovini, 1918-1941* [Pedagogical Thought in Bosnia and Herzegovina, 1918-1941], cit., p. 45.

New regulation

The next phase for teachers began in 1889, when a new regulation regarding teacher's exams was brought for. The regulation required that teachers in Bosnia and Herzegovina had to fulfil various requirements, in contrast with the teachers in other parts of the Monarchy who only needed to prove their theoretical and practical readiness for the teacher's profession. Contrary to this, exams for teachers in Bosnia and Herzegovina contained all subjects exercised in the Teacher training school. Thus, the candidate's duty was to show that he did not forget the contents he was taught and that he did some individual research regarding pedagogy. This kind of examination was made for one reason. There was a presumption that young teachers would forget much of their studies, especially because of the fact that curriculum had to be adapted to those students who did not have quality pre-knowledge. Special attention was given to pedagogical and national literature. However, these sorts of literature were rarity at that time and it was very difficult mission to get some of them in Bosnia and Herzegovina. Therefore, opportunities to get better understanding or to deepen professional knowledge were hardly approachable⁴².

After two years of working in the school, assistant teachers acquired the opportunity to apply for exams in order to become permanent teachers. The program of this exam was much rigorous than the programs for practical exams. Assistant teachers impatiently expected to pass this exam which would permit them to go about doing class work individually. The Decision of State government from 1885 proclaimed that assistant teachers were able to work only under the supervision of permanent teachers. However, the situation in education was still very poor, the lack of teacher still present and occasionally the authority approved individual work for assistant teachers, but only in the rural regions. They were controlled and supervised all the time by the state referees⁴³.

Different actions and activities required and expected from teachers

After more than two decades of the implementation of the institutionalized educational system in Bosnia and Herzegovina, teaching was promoted in schools by qualified lecturers who also then in turn became very good pedagogues. Experienced teachers had been introducing classroom work to students. Libraries within the schools had a satisfactory amount of pedagogical text-

⁴² N.N., *Promjene u organizaciji školstva u Bosni i Hercegovini* [Changes in Schooling Organization in Bosnia and Herzegovina], «Skolski Vjesnik», n. 1-4, 1909, p. 3.

⁴³ Papic, *Tragom kulturnog nasljedja* [Following the cultural heritage], cit., p. 81.

books. The Austro-Hungarian authority was aware of how influential education was. Because of this, the tasks assigned to teachers who dealt with the rural and urban population were considered to be very important. Therefore, there was a regular control of these schools and especially the teachers' promotion of prescribed curriculum which cleared up national histories, literature, geography and all facts which could provoke national feelings of young people.

Teachers were initiators and founders of several educational and other magazines. They established libraries, reading rooms in schools, villages and towns. The first educational magazine in Bosnia and Herzegovina was *Skolski vjesnik* (1894-1909). This magazine had an official appendix which published legal regulations of the school authorities and government related documents concerning education. The editor was well-known pedagogue and counsellor appointed by the government Ljuboje Dlustus who came to Bosnia and Herzegovina from Croatia. He knew from his own experience about the teachers' position because he used to work as a teacher.

Teachers too established teacher's associations which were publishers of the magazine «Uciteljska zora» (*The dawn of teachers*) in 1905. From 1910, this magazine became the magazine of the Alliance of all teachers' associations in Bosnia and Herzegovina. The initiator was Ante Jukic, a teacher and writer from Mostar. This magazine introduced publicly pedagogical and cultural needs of teachers. The first professors of the Teacher training schools and gymnasiums participated in much of the work of the mentioned educational magazines⁴⁴.

The Authority attempted to promote its political influences through education creating suitable state awareness. This was proved with the use of the curriculum that was legally grounded in the entire Monarchy. The style of the educational process was following European, Herbartian standards⁴⁵. This meant that theory included the basis for conventional, formalistic and mechanical teaching. Still, this insufficiency were fully apparent, because of the state's tendencies for complete control of school functioning and teachers' work in the public education system⁴⁶.

Teachers were not supposed to be politically active in any manner or to publically reflect their nationality. The regime considered them as the closest to the people because of their work and this was explained as the reason for constant and rigid control of their behaviour and activities. And for this reason, every teacher had to present a *Certificate on civilian behaviour* during

⁴⁴ Bevanda, *Pedagoska misao u Bosni i Hercegovini, 1918-1941* [Pedagogical Thought in Bosnia and Herzegovina, 1918-1941], cit., p. 57.

⁴⁵ *Ibid.*, p. 56.

⁴⁶ E. Protner, *Herbartisticna pedagogika na Slovenskem (1869-1914)* [Herbart's Pedagogy in Slovenia (1869-1914)], Maribor, Slavisticko drustvo Maribor, 2001.

the procedure of his/her employment or promotion. This certificate proved the national and political orientation of teachers. Naturally, this document was accepted readily by the teachers or the Bosnian Parliament⁴⁷.

The Law of Education (1911)

The law of compulsory education was declared in 1911 in the Bosnian Parliament. However, this law referred neither to children from confessional schools nor to female Muslim children. Children with physical or psychological disabilities were excluded from this law as well⁴⁸.

The new educational law emphasized the role and importance of the systematic education which controlled and led by the teachers who were loyal to the authority. The level of the attendance of the elementary and secondary schools was better than in the previous situation. Concerning the elementary level of schooling, two tendencies were present, inclusion of all children in the educational process and the education of new generations who were educated to be loyal to the regime.

Together with the overall legal regulation of education system and the reformation of the structure of school system on various scales, significant changes were made in connection with the methods and means of the regulation concerning the content of school activity. The main point of this approach was the increase of direct government influence and the reduction of the schools and teacher's rights. As emphasized above, the process of educational control and administration reflected political interests.

Social position of teachers

Nevertheless, the purpose of this work is to introduce the position of teachers. We will present the everyday concerns and problems that teachers faced in their social and private life. We have already analysed legal regulations and state acts which dictated the rules of behaviour and lives of teachers in Bosnia and Herzegovina. As pointed out, conditions of their professional work were complicated; the teacher's profession was neglected and ignored. Despite the fact that the period of Austro-Hungarian domination in Bosnia and

⁴⁷ Papic, *Skolstvo u Bosni i Hercegovini za vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hungarian occupation (1878-1918)], cit., p. 77.

⁴⁸ *The Law of Compulsory Education*, «Skolski glasnik» n. 7, 1911, p. 162.

Herzegovina was a period of educational and cultural prosperity and in spite of the development of school system, the function and importance of teachers was disregarded. There are many examples from their everyday lives which proved that their task was not simple at all. The following examples showed clearly that authority forgot and dismissed the teachers' role more frequently. Furthermore, constant inequity and different treatment among male and female teachers additionally complicated this problem. Namely, the position and work of female teachers was considered less worthy during the period of Austria-Hungary. Regardless of these concepts, teachers continued to be the main promoters of cultural and educational progress and they had a large and multiple responsibilities in the society, not only for pupils but for all inhabitants of the area where they used to work:

A good teacher is the one who educates pupils in a proper way, giving them the opportunity to work and harmonize their body and spirit. School will never reach its task if the teacher does not have the characteristics which one teacher-educator needs to have⁴⁹.

The active role of the teacher in the social community was of the great importance. The teacher kept getting more obligations in order to modernize life in their region and improve the position of inhabitants. The authority became aware of the importance of teachers who worked among the people. Their influence was of great value. Therefore teachers were supposed to know issues related to politics, medicine, and economy; and were expected to response to these challenges. The teacher had to put great effort in preparation for schoolwork. His duty was to treat all students equally, regardless of their social status. Teachers were always obliged to evaluate the student's knowledge objectively. Despite of all these efforts, teachers were not recognized in the community in the proper manner.

Their legal and social status was not of a high level and was not recognized to the proper extent by the Government. All obligations and duties that made the teachers' position universal, did not improve their position within society. They were always put in a second place, as they claimed⁵⁰.

Teachers protested against their mistreatment. They formed teachers' associations and published their own magazine *The Dawn of Teachers* in which they were writing about their position. They also publicly protested, writing a petition to the Ministry of Finance in 1905, asking that they be treated as equally as state employees. The representative of the government concerning the educational issues, Ljubomir Dlustus also wrote to the Ministry pointing out carefully and clearly:

⁴⁹ N.U., *Uciteljev ugled i autoritet u skoli* [Teacher's Reputation and His Authority in the School], «Uciteljska Zora», n. 9-10, 1914, p. 258.

⁵⁰ A. Prelodin, *Pravni položaj učitelja i skola* [Legal Status of School and Teachers], «Uciteljska Zora», vol. 4, n. 5-6, 1912, p. 166.

In general, teachers were in the state of depression and tiredness. Teachers' disappointment and disillusion were probably caused also by the fact that the official promises in connection with teachers' better position turned out to empty words and were not really kept. Teachers continued to live together with their families in insecure and miserable conditions, financially unsafe. It is really strange that they are still capable to fulfil their duties [...] ⁵¹.

After such letters and petitions, the Government reacted with a gradual increase of teachers' salaries in 1906 and 1908. They equalized teachers with state employees of XI and XII pay-ranks. These were the lowest levels of employee's ranks ⁵².

The teachers' position was a topic of the Bosnian Parliament as well. Namely, teachers sent their petition to the Parliament in 1910, asking for protection and support. The Parliament supported the petition analysing and comparing position of teachers with position of other state employees. Thanks to this, the position of teachers was slightly improved.

Concerning the social position of teachers, the State Government declared a recommendation for this issue, in late 1855. The political authorities were obliged to invite teachers to various manifestations and social events in order to pay special attention because of their educational activity in a particular social setting ⁵³.

Twenty years later, this recommendation was repeated because of the unequal treating of all state employees. This time it was announced:

The reason why teachers of elementary public schools are not integrated into the category of state employees does not lay in the fact that their profession is less worthy or because of their social status but exclusively and only because of the fact that public elementary schools in which they are engaged are not in a position of the category of State institutions where teachers used to have a character of state employees ⁵⁴.

In order to protect themselves in any way possible, teachers gathered in various association or class unions as Papic commented. The first such union was a Foundation for Teachers' Orphans from 1901, and was popular all over Bosnia and Herzegovina. In the same year, The Teachers' Association for Elementary Public schools for the Mostar region was constituted. Nevertheless, the Government was against such gatherings and did not support this project, explaining that it was forbidden to constitute associations for the wider region.

⁵¹ Bogicevic, *Istorija razvitka osnovnih skola u BiH* [History of Elementary School Development in BiH], cit., p. 165.

⁵² *Ibid.*

⁵³ Papic, *Skolstvo u Bosni i Hercegovini u vrijeme Austrougarske okupacije (1878-1918)* [Schooling in Bosnia and Herzegovina during the Austro-Hugarian Occupation (1878-1918)], cit., p. 76.

⁵⁴ *Ibid.*, p. 76.

Teachers were persistent in their requests and the Government approved this society after three years of negotiation. Later on, The Alliance of Teachers' Associations of Bosnia and Herzegovina was also established⁵⁵.

Legal regulations for elementary school teachers in Bosnia and Herzegovina

In order to be better informed regarding the social positions of teachers in Bosnia and Herzegovina during the Austro-Hungarian Empire, I will present the legal basis from 1906 which regulated the legal position of teachers in public education. There were 40 articles with clearly defined the position of male and female teachers, their obligations, limitations and duties in their teaching profession. The main directions considering this issue will be defined here.

This law consisted of general directions that obliged all teachers in Bosnia and Herzegovina. Only a teacher who passed the exam of maturity was able to be appointed as a teacher employed on a temporary basis while a teacher from public elementary school was able to work independently. The exam was held before the exam commission appointed by the State Government. Teachers had to work at least one year at school practicing in public, confessional or private elementary school which had the right to function. To become a teacher at a higher public school (town schools) or training school, a person had to attend a special exam to prove his capabilities under the condition that the candidate had a minimal of three years spent working in a public elementary school. Female persons were able to get a teaching position only if they were single or widowed, or to be married to a teacher⁵⁶.

If teacher candidates did not have the chance to work for five years after passing their exams (being capable to work as teachers), they had to pass the exam again. Exceptions were made only under determination of the Government. The Government defined public school teachers as public employees. The levels of teacher profession depended of their qualifications and years spent in school services. These levels determined teacher salaries, awards, promotions and later pensions. Included here were teachers of elementary and higher public schools and training courses, teachers of theology, principals and other employees in educational services. Assistant teachers only received monthly awards.

The Government ensured apartments to teachers if they served far from their places of residence. They had the school's gardens, land for agriculture and other economic buildings that belonged to the school. For the transport

⁵⁵ *Ibid.*, p. 77.

⁵⁶ *Legal Basis on the Position of Elementary Public School Teachers in Bosnia and Herzegovina*, «Uciteljska Zora», n. 7-8, 1912, p. 201.

of teachers from one place to another, they used to receive reimbursement for travel costs. If there was a case of a married couple who were both teachers, the travel costs were given to the person who was transferred for official reasons.

Teachers whose behaviour within or out of the school damaged the profession's image, would be punished or moved from the service. Female teachers who got married to persons who were not teachers also lost their position and it was considered that they voluntarily resigned⁵⁷.

Therefore, the social position of teachers was defined in accordance to the mentioned regulations. It was proclaimed that their position was the same as the position of state employees, but this was not true in reality. In consideration of previously mentioned facts a conclusion may be drawn, that the teacher's inequity in regard with state employees was evident and they were not respected in a way as to be expected in accordance to their position.

The Control of Teachers

Teachers were controlled by the state authority and their political orientation was always under question. Namely, each urban and rural area had its professional supervisor who controlled the work of teachers and the functioning of the school. Supervisors were loyal to the state and their task was to make reports on the teachers' everyday activities.

They also checked the teacher's loyalty to the state and their teaching concerning national subjects. Those supervisors were persons who were not competent to deal with educational work and to evaluate the teacher's work, as it was the case with the expert in other state institutions. They wanted teachers to follow their instructions how to work, even though they did not possess pedagogical knowledge⁵⁸.

Teachers were humiliated by the fact that they were judged by people who were not qualified to do this.

They provoked teachers putting them in a contradictory position in front of the pupils and giving their own instructions for 'better' teaching. «The teacher becomes nervous and depressed because of the behaviour of supervisor. He feels as if he needs to learn and pass exams again»⁵⁹.

Supervisors were ignorant and rigid. They accused teachers of working in their own way not respecting their advices, but also humiliated those who listen to them and followed their instructions⁶⁰.

⁵⁷ *Legal Basis on the Position of Elementary Public School Teachers in Bosnia and Herzegovina*, cit.

⁵⁸ Prelodin, *Pravni položaj škole i učitelja* [Legal status of school and teachers], cit.

⁵⁹ *Ibid.*

⁶⁰ N.N., *Starjesine i podređeni* [Commanders and Subordinated], «Uciteljska Zora», n. 2,

If teachers wanted to get a position as supervisor, they were obliged to pass the exam test. This was absurd that the political authority requested the experienced teachers to do this, while in a same time, non-professionals were posted to these places without passing the exam. This selection and exclusion additionally humiliated teachers. Their disagreement and revolt was published in the magazine «The Dawn of Teachers» in 1912⁶¹. This was the teachers' way of attracting attention to their position.

The society of that time consisted of civil servants, who did not accept teachers as their equals, but only as unpleasant companions. The first reason was the bad material position of teachers, which often provoked pity or sympathy in the bureaucratic society. In their everyday life, teachers faced managers, bureaucrats school clerks and other employees who had authority and more rights than teachers ever dreamed of. Teachers who worked in villages were paid for their work, but were not refunded for fuel and flat rent, while those who worked in towns were paid more. Schools which were financed by the municipality gave smaller salaries to teachers. Female teachers were in a worse position regarding payments. If they were married, they did not get additional payments such as rent, fuel or travelling and moving costs, and they were paid 50% less⁶².

The Position of Female Teachers

The legal regulation from 1906 clearly emphasised that female teachers were allowed to work only if they were single or widowed, or married related to a teacher (article 2) This decision was unfavourable to the position of female teachers who were limited in choosing their future husbands. They were allowed to be married only to a teacher. If a female teacher excluded from consideration a colleague teacher as her husband and got married to a trade-man, for example, it would be considered as her release from the service. She would never be allowed to work as a teacher any more (article 28.). The practice of being unjust and unfair towards female teachers reflected also in their salaries. Even in a situation when they married teachers, their salary would be reduced for 50%. This decision had the aim to prevent a better financial position of teacher population in Bosnia and Herzegovina, humiliating female teachers by considering their work less worthy then their husbands. It was not a rare case that the authority transferred and removed married teachers to the small and

1913, p. 41.

⁶¹ Prelodin, *Pravni položaj škole i učitelja* [Legal status of school and teachers], cit., p. 166.

⁶² *Ibid.*, p. 95.

back-warded villages where living conditions were more difficult, especially if they had children. During their transfer, the cost payment was ensured only to a teacher who was officially transferred (Article 27)⁶³.

There were numerous examples which clearly disclosed the unenviable position of female teachers in that period of time. Namely, it was considered that female teachers would fulfil their duties to a greater degree if they were not married. There was a presumption that married female teachers would neglect their pupils and take care only for their own children. The reaction of the teachers was not in concordance with the regulation. Teachers viewed themselves as free persons with basic right to get marry. Each law concerning different regulation had harmful and discriminative effects. Their explanation started with the fact that the married teacher was favourable for a school in contrast with a non-married teacher could be good lecturer and could dedicate herself fully to her pupils reaching excellent results, but that love was never as strong as it was love of teacher who was a mother at the same time:

A teacher who is a mother understands the soul of a child. She lives with its life. She can read from its eye weather it does something bad or good. She can heal, support and calm them down. When a child is restless she does not use a rope. Quite the opposite, she questions the conditions, society and family. She sympathizes with her pupils in every aspect of the child's life⁶⁴.

Pointing out the favours of being mother and a teacher in the same time, female teachers attempted to fight the official prejudice that the best teacher was an unmarried teacher. On the other hand, there were some rumours that pregnant teacher would confuse pupils and put them in an unpleasant situation. This presumption was inadequate and inappropriate. These pupils mostly came from the multiple families⁶⁵.

The appointed legal regulations met numerous objections from single teachers but also married teachers who spent 5, 10 or 15 years in a teacher's position. Before this regulation, they used to have the same salaries as male or single teachers. Now, their income was significantly decreased. Those who lived with their husbands lost flat rent. Teachers who lived and worked in villages were in a worse position than those in towns who got bigger amount of money for their costs. Their children were also in a better position having the opportunity to attend town's school⁶⁶.

⁶³ *Legal Basis Related to Teachers of Elementary Public Schools in Bosnia and Herzegovina*, cit.

⁶⁴ N.N., *Dvije, tri za udaju uciteljica* [Two or three female teachers], «Skolski Vjesnik», n. 4, 1907, p. 271.

⁶⁵ *Ibid*, p. 273.

⁶⁶ D. Janjčić, *Nasi pravedni zahtjevi* [Our Rationalized Requests], Mostar, «Uciteljska Zora», n. 4, 1910, p. 103.

All these facts reflected on how badly teachers were treated and how silent their words were. It seems that the authority made so many efforts in order to make the teacher's life more difficult.

Conclusion

The period of the 40 years of Austro-Hungarian government in Bosnia and Herzegovina was very short in comparison with the 400 years of the Ottoman period of government. Therefore, it requires a great effort to comprehend the achievements of the new educational policy brought by the Austro-Hungarian monarchy. It seems that the obvious contradictions related to positive or negative judgment appeared because of national issue.

However, this period was regarded as a period of prosperity at the field of education, especially considering that the Austro-Hungarian monarchy realized the importance of education and faced the challenge to do something in order to make literate 97% of the illiterate population.

The relation between government and teachers had its negative and positive moments; in short it was a very controversial issue. Teachers were fighting for their rights all the time and against their exclusion from the level of state employees.

During the period 1878-1918 numerous schools were built and teachers got the opportunity to discover their own talents and to improve their profession. The Authority was against any kind of outer or inner ambitions of national activities. This could be a reason for the suppression of teachers as they had been seen as national tribunes. It was not something that teachers asked for. They were put in this situation by the interest of the regime. They were servants and opponents at the same time. If they wanted to work as teachers they had to take an oath of allegiance promising the loyalty to their sovereign.

The modification of legal regulation in Bosnia and Herzegovina offered some option to teachers that were not really welcomed by the teacher community. The educational authorities made a great effort to restrict teachers dealing in every field of public life in which teachers took part. However, teachers kept asking for their rights and their associations did a lot in improving their insignificant position. Nevertheless, their profession was evidently not financially safe or secure but it was full of controversy and always measured by double standards. They were state employee but without privileges.

Even though the period of Austro-Hungarian governing in Bosnia and Herzegovina determined a turn in educational policy, the promotion of elementary schools and larger number of educated teachers did not correspond with a degree of literacy in the people which still left very high.

The development of primary school teacher education in Montenegro

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ABSTRACT: This work represents a completed theoretical research, organised with an aim to present and analyse primarily the phenomenon, process and development of the systematic teacher education in Montenegro, i.e. their professional development, schooling and specialisation. In realising this goal, we set off with an analysis of the work of the first educational teacher training institutions and their development till the present day. Having considered all those important background circumstances and elements that influenced their foundation, work and development, we have studied some of the curricula used in their work. To a certain extent we have analysed the status and the quality of the teaching staff. By applying the method of theoretical and historical analysis we have researched the relevant facts which refer to the education of teachers in Montenegro in certain historical periods. Greatest attention has been given to the presentation and analysis of the beginnings of the systematic and institutionalised education of teachers in the period from 1869 to 1914, but we have also provided insight into some later phases of its development, i.e. the following historical periods: from 1918-1941; 1944-1963; 1963-1993 and from the year of 1993 till the present day. Our research has shown that in its continuous development teacher education in Montenegro has taken various forms, transformations and reforms, each of which is extremely important with all of their peculiarities; very frequently teacher education was exposed to various political, national, religious, ideological, economic, cultural and pedagogical influences coming from the region or other European countries; as the time went by it became a modern system of education which is compatible with most of the teacher education models across Europe.

EET/TEE KEYWORDS: Teacher Education; History of Education; Curriculum Development; College of Education; Educational System; Montenegro; XIX-XX Centuries.

Introduction

The history of teacher education in Montenegro largely reflects evolution of the society and the state through the centuries. This development has been exposed to a variety of influences and has taken a variety of different forms which were shaped by historical circumstances and coloured by political, economic, national, cultural, educational, ideological and religious elements.

The beginnings of a systematic and institutional teacher education in Montenegro can be traced back to the seventies of the nineteenth century. This is the age when the first Ministry of Education and Religious Affairs was set up in 1882¹, subject to and heralded by the prior adoption of a number of statutes and regulations (pertaining to labour and teacher education), and due to the real needs and events, i.e. the expansion of primary schools and the opening of the first high schools.

Teacher education in Montenegro has had a relatively long tradition. The basis of its foundation can be traced back to the *Interim Seminary*, which existed in 1863 in Cetinje. A more proficient teacher education took place from its renewal within the *Seminary* (1869-1876), and finally a proper teacher education for that time was established by its transformation into a *Theological-Teaching School*, which intermittently worked between 1887-1916. Also, as far as the beginnings of education of teaching staff are concerned, it is important to point out the work of *Empress Maria's Maiden Institute* in Cetinje in the period from 1869 to 1913. However, it was not until after World War II that the process of transformation into teacher-training schools at a higher level began, and then into university education, for which particularly important was the formation of the Pedagogical Academy in Niksic (Nikšić), which grew into a *Teacher-training school* i.e. the Faculty of Philosophy (a branch of University of Montenegro).

This paper presents the results of the research on the development of teacher education in Montenegro. The greatest attention has been devoted to a review and analysis of the occurrence of systematic and institutionalized teacher education in the period 1869-1914. We have also given an insight into the later stages of its development, i.e. during the following historical periods: 1918-1941, 1944-1963, 1963-1993 and since 1993 to the present day. In doing so, the author has analyzed some curricula used by certain teacher training schools. He has also analysed the circumstances under which these institutions were created and influences under which they evolved.

¹ V. Cvijovic, B. Kovachevic, *Upravljanje prosvjetom u Crnoj Gori* [Enlightened Management in Montenegro], Podgorica, Kulturna prosvjetna zajednica Podgorica, 1996, p. 17.

Primary school teacher education from 1869 till World War I

1. Seminary (1869-1875) and Theological-Teaching School at Cetinje (1887-1916)

It is important to point out that in 1863, besides the existing primary school, the first, although incomplete, vocational high school in Montenegro was established in Cetinje. It was organised in the form of a set of theological and lay pedagogical courses for mature students who desired to dedicate themselves to a priestly career, but who also sometimes worked as teachers². It was conceived as a three-year school, but was cancelled after less than a year (due to a lack of funds) for the reason of which in the literature, it is often mentioned under the name of *Interim Seminary* (instead of Seminary). The school's three-year curriculum is the only document that has survived. However, there is no mention of the syllabus and textbooks on the basis of which it could be judged on the implementation of the teaching at the school. Although it only worked for one year, two of the school's students have been placed as teachers, because the need for them was great having in mind that there was already a fast expanding network of primary schools in Montenegro.

The school was re-opened in 1869 in Cetinje when a three-year *Seminary* began with its work. Previously, Prince Nikola I Petrovic (Nikola I Petrović), the ruler of Montenegro, received financial support from Russia for its foundation. The seminary was also enrolling students from other countries.

The school was supposed to educate both future priests and teachers. The following subjects were included in the curriculum: General Catechism, Church History of Old Testament, Mother tongue, Russian language, Church Slavonic Language, General History, Anthropology with Physiology, Dialectics, Physics, Church singing, Moral Theology, Homiletics, Church History of New Testament, Holy Scriptures, Economics, Pastoral Theology, Liturgics, Church Law, Church History, Teaching Methods, Mathematics, Pedagogy, General Geography, Short History of General Literature and Military Exercises³.

In 1873/74 the Seminary was moved to the monastery of Ostrog, near the town of Niksic, and on the completion of the school year 1874/75 it closed due to the war⁴. For the Montenegrin education the Seminary was important, among other things, because it educated a significant number of people who in

² S. Backovic (ed.), *Knjiga promjena* [The Book of Changes], Podgorica, Ministarstvo prosvjete i nauke, 2001, p. 179.

³ M. Kostic, *Škole u Crnoj Gori od najranijih vremena do današnjeg doba* [Schools in Montenegro from the earliest time to the present day], Panchevo, 1876, pp. 193-198.

⁴ *Bogoslovija Svetog Petra Cetinjskog* [Seminary of St. Peter of Cetinje], <http://www.bogoslovija.me/?page_id=17#p2> (last access: October 16th, 2012).

the decades to follow worked in schools and in other important educational and cultural jobs, diplomacy and public administration, while some were engaged as writers and wrote articles in various fields⁵.

After its closure, the relevant government and education officials took a position that without the specialized schools for future teachers, primary schools, vital for education of population, would not be able to develop properly⁶. There existed a need for establishing special schools for priests and school teachers. It was found that it was essential to publish a *Draft for the Montenegrin Teacher Training Schools*⁷ in order to start a discussion of whether and how to change something in the system of education for teachers and priests in Montenegro. The *Draft* prescribed a teacher-training school with a practice classroom and a free boarding facility for 25 best deprived male or female trainees of at least 14 years of age who had successfully completed four years of primary school (until the establishment of an eight-year school), and passed the entrance exam. The candidates were to commit themselves to at least 10 years of teaching. The Board of Teachers was expected to select the best and the poorest students in the first three weeks of instruction. The *Draft* contained the disciplinary rules for students, the terms under which male and female teachers were received in service, the duties of teachers and the Board of Teachers, retirement and way of rewarding teachers and their assistants, the duties of principals, curricula for four grades and for 16 subjects (3 of which were clerical), instructions in textbooks, exams and evaluation of students, practice classrooms (local primary school, which was supposed to be an eight-year school), supervision of the Minister of Education, church work, and others.

Finally, in the fall 1887 a three-year *Theological-Teaching School* was established in Cetinje (with minor interruptions it worked until 1916, and since 1920 just as a Seminary) and it worked until 1913, when the Teachers' School was established in Pec (Peć), the only school for education of teachers in Montenegro.

The school had boarding facilities and an entrance prerequisite was a completed four-year grammar school. The school was intended for education of future priests and teachers⁸. Only the most successful students who had completed grammar school were able to enrol. It is interesting that mostly the same teachers taught both in the Grammar School and the Theological-Teaching school in Cetinje.

When the school started with its work, the following subjects were taught: General Introduction to Theology, The Bible: Old and New Testaments, Dogmatic

⁵ Z. Deletic, *Ogledi iz istorije prosvjete* [Essays in History of Education], Prishtina, Narodna i univerzitetska biblioteka Prishtina, 1998, p. 53.

⁶ Dj. Pejovic, *Razvitak prosvjete i kulture u Crnoj Gori, 1982-1916* [The development of education and culture in Montenegro, 1982-1916], Cetinje, Obod, 1971, p. 120.

⁷ «Glas Crnogorca», Cetinje, 1879, pp. 18-21.

⁸ «Glas Crnogorca», Cetinje, 1888, p. 31.

and Polemic Theology, Moral Theology, Pastoral Theology, The History of the Orthodox Church in General, with a particular stress on Peoples' Church, Church (Canonical) Law, Liturgy, Homiletics with Oral and Written Practice, Church Slavonic Language, Russian language, The principles of Church Singing, Anthropology and Dietetics with Home Remedies, Pedagogy (theoretical and historical), Methodology with practical exercise and Agriculture⁹. It can be seen that the curriculum is missing some subjects which were represented in primary schools. Thus, future teachers for mathematics, geography, history and native language had to do with what they had learnt in primary and high schools. Still, the method of vocational education, its character, and quality were not without significance for the later work of teachers.

In 1890/91 the concept of school, which was still a three-year school was adopted and used until its temporary closure in 1905. The following subjects were included in the curriculum: Dogmatics, History of the Christian Church, the Scripture with Hermeneutics, Moral Theology, Fundamental and Polemical Theology, Liturgy, Homiletics, Pastoral Theology, Canonical Law, Introduction to Philosophy, Methodology, Slovene Language, Russian Language, History of Russian literature, History of National Literature, Pedagogy, History of Pedagogy, Anthropology, Greek language, Agriculture, Hygiene, Home Remedies, Church Singing and Typicon, Annotated singing, Drawing, Military Exercise and Geography¹⁰.

This curriculum did not equally have mother tongue, mathematics, history, i.e. those school subjects which are fundamental for education of teachers and their presence in primary school. Theological-teaching school renewed its work in 1908/09. Most of the previous rules were kept in the school, but it now became a four-year school. However, some significant changes took place.

For a long time since the establishment of school until 1908 the classes were bifurcated in the third year, when students chose to study to become either teachers or clergy. Only since 1908, when the school grew from three years to four years, students midway through their training opted for one or the other calling. After being educated to become priests, they could not be both priests and teachers, as it was the case previously¹¹.

⁹ *Pravila o ustrojstvu Bogoslovsko-uchiteljske Shkole na Cetinju* [Rules on the organization of Theological-Teaching School in Montenegro], Cetinje, Bogoslovsko-uchiteljska škola, 1887, article 30.

¹⁰ *Nastavni plan i program za Bogoslovsko-uchiteljsku školu i knjazevsku crnogorsku drzavnu gimnaziju u godini 1890/1* [The curriculum for Theological-Teaching School and state high school Prince of Montenegro in the year 1890/1], «Prosvjeta», vol. 11/12, Cetinje, 1890, pp. 269-289.

¹¹ B. Ivanovic, *Škola i obrazovanje u Crnoj Gori juče i danas* [School and education in Montenegro, yesterday and today], Cetinje, Obod, 1981, p. 52.

Also, it is important to point out that the new curriculum at the school represented to a greater degree those subjects and contents of the importance for education and work of prospective teachers.

So, from 1908 the following subjects were studied at the school: the Holy Scriptures with Biblical Hermeneutics; Liturgy and the Church Archaeology; Canonical law; History of the Christian Church with Elements of Patrology; Dogmatics with Rhetorical Theology; Ethics; Pastorship; Apologetics; Homiletics; Church Slavonic Language; Pedagogy; (theory of teaching, didactics; methodology of all subjects in the primary school); Mother tongue; Russian language; National and General History; Geography of Neighbouring Countries and Geography of Montenegro; Mathematics; Science; Agriculture; Hygiene with Home Remedies; Knowledge of the Law (state and social order); Church singing; Annotated Chant; Drawing and Calligraphy; Gymnastics with Military Exercises and Craft Work¹². Both theoretical and practical education were organised at the school.

Although the Seminary continued to work after the First World War, the role of teacher education was taken over mainly by specialized schools for teachers. Theological- teaching school played a very important role in the Montenegrin education and culture. It educated priests and teachers who played the major enlightening role in the Montenegrin society.

2. *Empress Maria's Girls' Institute at Cetinje (1869-1913)*

Empress Maria's Girls' Institute was opened at Cetinje on September, 8, 1869. It was the first female high school in Montenegro and the Balkans, and it was probably the most renowned South Slavic school of the time. At the time, this was the only school in Montenegro in which, among other things, female teachers were educated¹³. In the final year of studies theoretical and practical activities relevant to the work and education of future teachers were realised, although it was not the primary objective of the school. This educational institution worked until 1913 (with interruptions during the liberation wars from 1876-1878).

Milos Starovlah (Miloš Starovlah)¹⁴ points out that the ruler of Montenegro Prince Nikola I Petrovic was the principal initiator of the Institute, as during his stay in St. Petersburg (Saint Petersburg; Санкт-Петербург) he met with the

¹² Pejovic, *Razvitak prosvjete i kulture u Crnoj Gori 1982-1916*, cit., p. 124.

¹³ P.A. Rovinski, *Djevojacki institut "Carice Marije" na Cetinju* [Empress Maria's girls' institute at Cetinje], Cetinje, Obod, 2000, p. 5.

¹⁴ M. Starovlah, *Škola između vlasti i slobode* [School between authority and freedom], Cetinje, Makarije, 1993, p. 116.

Russian nobility, and noted the presence of a great number of educated women. Prince liked the idea of turning the capital Cetinje into a nursery of culture and of improving the education in Montenegro. The establishment and work of the Institute was funded from the personal funds of the Russian Empress Maria Alexandrovna (Мария Александровна), and its work was under the direct supervision of Montenegrin Princess Milena, the wife of Montenegrin sovereign Nikola I Petrovic¹⁵. Female administrators were appointed by the Russian empress and these were all famous Russian teachers, and the institution was formally governed by the Committee¹⁶. The first head of the Institute was a Russian called Nadezhda Petrovna Pacevich (Надежда Петровна Пацевичь).

One can say that the aim of establishing the maiden Institute was twofold¹⁷:

- political, i.e. the tendency of the Russian and Montenegrin courts to, through upbringing and education of young girls, gain a stronger impact on the consciousness of the Slavic people in the Southern Balkans who were under Austro-Hungarian and Ottoman domination; and
- of educational nature: that students were educated in the spirit of Orthodoxy and love for their country; to promote family life; become good teachers, housewives and mothers.

Most information on the work of the maiden institute was provided by Pavel Apolonovich Rovinski (Павел Аполович Ровински) in the study *Devichin institut inperatoricy Marii v Cetinje v Chernogorii*¹⁸ published in 1895 and much later translated in Montenegro¹⁹. In the first academic year only five teachers worked at the Institute²⁰. Although it lacked teaching staff and there were times when the teaching was done only by two teachers, the situation improved, so that in the academic year 1888/89 there were 8 teachers and the principal who was also involved in teaching. Besides Pacevich, the teaching was also done by part time teachers: Deacon Filip Radichevic (Filip Radičević), teacher Milan Kostic (Milan Kostić) and Archimandrite Visarion Ljubisha (Visarion Ljubiša).

The Institute had very good financial standing. Rovinski²¹ states that there was a rich selection of books in Russian, French and native language, a few well-equipped classrooms and collections (Physics Laboratory, Chemistry Laboratory, a mineralogical collection, telescope, various maps, 2-3 pianos, and

¹⁵ Rovinski, *Djevojachki institut "Carice Marije" na Cetinju*, cit., p. 5.

¹⁶ *Ustav Djevojachkog Instituta Carice Marije na Cetinju* [The Constitution of Empress Maria's girls' institute at Cetinje], Cetinje, 1885, article 1 and 3.

¹⁷ R. Delibašić, *Djevojachki Institut kao regionalna škola i rad knjaza (kralja) Nikole na otvaranju Velike škole-fakulteta* [The Girls' Institute as regional school and the work of Prince Nicole for the opening of the Great School], «Vaspitanje i obrazovanje», Podgorica, Obod, p. 19.

¹⁸ P.A. Rovinski, *Devichin institut inperatoricy Marii v Cetinje b Chernogorii* [The Empress Maria's girls' institute at Cetinje in Montenegro], Sankt-Peterburg, Slavjanskoe blagotvoriteletija obshetstvo, 1895 (in Russian).

¹⁹ Rovinski, *Djevojachki institut "Carice Marije" na Cetinju*, cit.

²⁰ *Ibid.*, p. 5.

²¹ *Ibid.*, p. 7.

other musical instruments, a collection of models and other necessary supplies for teaching drawing and calligraphy). The Institute had a large gymnasium (with mostly gymnastic props) and a dispensary clinic for the treatment of sick students.

It was expected that the students were girls between 9 and 12 years of age, that they possessed basic literacy skills, knew the basic prayers, how to write numbers and count to a hundred. However, in the beginning it was not possible to meet this condition, because more than half of the students were completely illiterate, so the Institute also took on the role of primary schooling. Thirteen students were enrolled in the first year, of which six in the prep-class. On occurrence of primary schools which also enrolled female children, the Institute required from the candidates some demonstration of knowledge. Best students were given the opportunity to continue their education, after which they were entitled to be female teachers in primary schools, which, at the time, were only a few.

An important feature of the school was that it educated girls from the privileged social groups. At first, these were the children of Montenegrin governors and wealthy parents²². From 12 to 14 students were enrolled, but in the last school year (1912/1913) there were even 112 of them²³. Although the Constitution of the Institute, i.e. the curriculum²⁴ prescribed an annual enrolment of 30 charges (of which 20 had their tuition fees paid for by the Institute, whilst 10 of them were self-financed), this regulation was not complied with. It is clear that during the first 10 years of its work, the Institute was attended by 65 students, of which 42 were from Montenegro, and the remaining 23 from the Bay of Kotor, Dalmatia (under the rule of Austro-Hungarian Empire at the time), Shkodra and one Italian girl from Zadar. For the 40 years of its existence, the Institute was attended by 450 students, of whom 205 came from Montenegro, whilst 245 female students came from other countries (203 were from the territory of the Austro-Hungarian Empire, 25 from the neighbouring regions under Ottoman rule etc.)²⁵. This indicates that the Institute was not only a national school, but had a character of a regional educational institution.

In the first phase of its work the curriculum of the Institute was compatible with the one of the Russian female grammar schools. Rovinski²⁶ states that foreign languages were favoured (Russian and French), and in terms of skills

²² *Ibid.*, p. 6.

²³ *Ibid.*, p. 7.

²⁴ By moving into the new premises the Institute got its Constitution and its Curriculum, which were produced by the main administrator and were endorsed by King Nikola I Petrovic on April 12th, 1873.

²⁵ Rovinski, *Djevojački institut "Carice Marije" na Cetinju*, cit., p. 7.

²⁶ *Ibid.*

women's handicrafts and music were particularly emphasized. Housekeeping, upbringing of children and nice manners found their place in the educational process.

By the beginning of the school year 1873/74, the Institute was a four-year school, divided into two classes, each lasting two years. Students who wanted to become teachers remained in the Institute the fifth year in order to gain practical training by teaching new students and study additional teaching-related subjects. The school was a state boarding school. Exams were organised upon enrolment, on the transition from junior to senior classes and at the end of schooling. The following subjects were taught: Christian Science, Mother Tongue, Russian, French, History, Geography, Mathematics, Sericulture, Singing, and they were also taught household skills²⁷.

In 1874, education was extended to six years with three classes, each lasting for two years. After completing the second grade students were ending their education, and the best ones who were trained to be teachers stayed for two more years predominantly dedicated to practical activities²⁸.

On several other occasions, the curriculum of the Institute experienced transformation. According to the one from 1879, in the five existing grades the following subjects were taught – in the first four grades: Religion, Mother Tongue, Russian, French, Mathematics (calculus and geometry); Geography, History, Zoology, Mineralogy, Botany, Chemistry, and Physics; Handicrafts, Household Management, Calligraphy, Drawing, Singing, Music, Gymnastics; – and, in the fifth grade (intended for future teachers): Pedagogy, i.e. Psychology, Logics, Education Science and Methodology²⁹.

The new curriculum came into effect on September 1885. During the six years the following subjects were studied: Mother Tongue, Russian, French, Calculus, Geography, History, Environmental science, Calligraphy, Handicraft, Physics, Teaching Methods and Hygiene³⁰. According to the curriculum from 1889/90, the schooling was extended to seven years and the new subjects were Drawing, Gymnastics, Singing and Annotated Chant. The curriculum from 1890/91 extended the schooling to eight years and introduced the new subjects: Knowledge of Homeland, National History and the History of Russia³¹.

According to the curriculum from 1894, 21 subjects were taught at the Institute: Religion, Mother Tongue, Russian, French, Knowledge of Homeland, World History, National History, Russian History, Geography, Mathematics,

²⁷ *Ibid.*, p. 34.

²⁸ Ustav zenskog crnogorskog instituta, prema: Z. Dragović, *Izvjesh taj o dvadesetogodishnjoj radnji djevojackog instituta Carice Marije na Cetinju* [Report on twelve activities at the Empress Maria's institute for Girls], «Prosvjeta», Cetinje, 1889, pp. 398-400.

²⁹ Rovinski, *Djevojacki institut "Carice Marije" na Cetinju*, cit., p. 36.

³⁰ Ustav zenskog crnogorskog instituta, prema: Dragović, *Izvjesh taj o dvadesetogodishnjoj radnji djevojackog instituta Carice Marije na Cetinju*, cit., pp. 413-415.

³¹ Cvijovic, Kovachevic, *Upravljanje prosvjetom u Crnoj Gori*, cit., p. 48.

Physics, Natural history, Pedagogy, Methodology, Calligraphy, Drawing, Music, Handicraft, Gymnastics, Piano Lessons and Household Management. This was an eight-year school³².

In 1907 a curriculum was adopted according to which the Institute worked up to its closure as an eight-year school. In order to raise the knowledge bar and even out the difference between the students, a special preparatory class was created. The following subjects were studied: Christian Science, Native Language, Russian, French, Geography, General History, The History of the Serbs, Montenegrin History, Russian history, Mathematics, Physics, Science, Calligraphy, Drawing, Handicraft, Household Management, Gymnastics, Pedagogy, Psychology, Didactics, Logics, History, Pedagogy, Methodology, Music and Singing. German was not a mandatory subject from the third grade and was introduced gradually until the end of grade eight³³.

This sort of program was more suited to a teacher training-theological school in Germany than to a female high school institution in Montenegro, so that the objections on its being demanding and its maladjustment were justified. There were many complaints about the program. For example, it was felt that too much emphasis was placed on teaching foreign languages, native language whilst national history and geography were not studied sufficiently³⁴. In 1906 the Institute was also discussed in the National Assembly. The Institute was financially supported by the Russians, who therefore appointed a number of school's administrators and teachers and thus strengthened Russia's influence in Montenegro. The situation escalated with the conflict between the school's administration and the Ministry of Education and Religious Affairs concerning the acknowledgment of the right of supervision over the Institute by the Kingdom of Montenegro. The growing dissatisfaction with the Russian influence on school's work and poor relations between the Russian and Montenegrin courts led to a more serious conflict and the closure of the Institute in 1913³⁵. Archival documents were taken from the Institute to St. Petersburg. There was a plan to relocate the Institute and its administration to Nis according to an agreement with King Peter Karadjordjevic (Petar Karadorđević). However, this did not happen due to the major political events which were on the horizon – the First and the Second Balkan Wars 1912-13 and the First World War³⁶.

Despite the objections, the results achieved as regards the education of female population were still significant. It should be noted that only a small number of students who had graduated from the Institute went into teaching

³² *Nastavni plan za Djevojachki institut carice Marije na Cetinju* [The curriculum for the Girls Institute of Empress Maria in Cetinje, 1894], Cetinje, 1894.

³³ *Nastavni plan i program za Djevojachki institut "Carice Marije" na Cetinju* [The curriculum for the Girls Institute of Empress Maria in Cetinje, 1907], Cetinje, 1907.

³⁴ Deletic, *Ogledi iz istorije prosvjete*, cit., p. 57.

³⁵ Pejovic, *Razvitak prosvjete i kulture u Crnoj Gori 1982-1916*, cit., pp. 130-131.

³⁶ Rovinski, *Djevojachki institut "Carice Marije" na Cetinju*, cit., p. 21.

(only 15-20)³⁷, and the reason for this is the fact that they, given the family background and educational level, got married right after the graduation to governors (secular government) and other senior officials, and of course the teaching profession was not too interesting to them³⁸. However, they were, among other things, using the education gained at the Institute to become exemplary wives, mothers and homemakers. The work of the Institute was also a forerunner and the basis for the mixed-teacher schools in Montenegro.

3. *Teachers' school in Pec (1913-1915)*

Up until the Balkan Wars (1912-1913) the need for teaching staff was generally satisfied in Theological-teaching school in Cetinje. After these wars, Montenegro obtained a large territory, which had previously been under the rule of Turkey, where there were very few schools. However, the need for more teachers constantly grew as in the newly liberated areas the new schools were opened.

Immediately after the liberation of Metohija, Montenegrin government opened a Teachers' school in Pec for residents of Berane, Gusinje and Metohija (the school worked from December, 1913 till December, 1915)³⁹. The Schools' Statute⁴⁰ prescribed that the schooling should last for three years. Students who completed four years of grammar school or technical high school were able to enrol. Teachers' School, in contrast to the local grammar school, had a large number of students and was very popular. It was envisioned that, in addition to the practice classrooms, the school would have a library, a garden, and a selection of books necessary for teaching. The school was well equipped with teaching aids and had a pretty skilled teaching staff.

An ambitious project was behind the establishment and operation of the school. That is «Montenegro wanted to obtain capable teaching staff, better educated than those teachers who were working in these areas and were mainly coming from elsewhere»⁴¹. However, the outbreak of the First World War meant the end of the school, so that we cannot talk about its impact on the improvement of the Montenegrin teaching staff, for it failed to fully educate

³⁷ M. Stojovic, *Djevojachki institut na Cetinju* [The Girl's Institute in Cetinje], «Nastava i vaspitanje», n. 2, 1970, p. 216.

³⁸ R. Delibashic, *Razvoj shkolstva i pedagogshke misli u Crnoj Gori 1830-1918* [Development of educational and pedagogical thought in Montenegro, 1830-1918], Titograd, Republichki zavod za unapredjivanje shkolstva, 1980, p. 107.

³⁹ Backovic (ed.), *Knjiga promijena*, cit., p. 179.

⁴⁰ *Uredba o shkolama u oslobodjenim krajevima i Pravila za uchenike uchiteljske shkole* [Regulation of the schools in the liberated areas and Rules for students in teachers' school], Cetinje, 1913, articles 22-52.

⁴¹ Ivanovic, *Shkola i obrazovanje u Crnoj Gori juče i danas*, cit., p. 63.

not even a single generation of students. During the upcoming war 35 teachers died⁴², and a new teacher training school was to be set up as soon as possible. Since there were no favourable conditions for its work in Pec, following the liberation it was relocated to Danilovgrad.

4. *The status, quality, and professional development of teachers from the second half of the nineteenth century until the beginning of World War II*

From the beginning of the seventies of the nineteenth century considerable effort and resources were invested towards education and training of teachers in Montenegro. The improvement of the education system was made by opening new schools and improvement of the existing curricula. In addition, a significant number of teachers were trained abroad. For example, by the end of the 1915 a significant number of primary school teachers were trained in seminaries, teacher-training schools and other schools in Prizren, Belgrade, Sremski Karlovci, even in Russia, and amongst secondary school teachers there were those who had been educated in other European countries.

Although there was a relatively significant number of trained teachers, some of whom were notable cultural and public figures, scientists and authors (according to the criteria and circumstances of the time) in a variety of areas, still throughout this period there were problems in the provision of teaching staff in Montenegro. This was caused by the increased demand, but also by the brain drain. When it comes to the organization of professional development of teachers, the efforts of both the state and individuals in positions should be pointed out, as well as teachers' own efforts to work on self-education and training. Biographies of a number of teachers, as well as bibliographies of journals attest that many of them were successful in their endeavours. However, there were also teachers without the necessary qualifications, especially in poor villages. A certain number of teachers graduated from grammar schools in Cetinje, Kotor, Dubrovnik, Belgrade and other places; there were teachers who had completed vocational schools, even those who had completed only primary schools, a class or two of a seminary or grammar school. Some of them invested considerable efforts towards their specialisation and got good grades in observations of their work.

*The Law*⁴³ from 1884 did not precisely stipulate the required qualifications of teachers. Article 31 of the Act prescribed that the Main educational inspectorate

⁴² R. Vukovic, *Otvoranje i prve godine rada Učiteljske škole u Danilovgradu* [Opening and first year of the Teacher Training School in Danilovgrad], «Vaspitanje i obrazovanje», n. 2, 1979, p. 146.

⁴³ *Zakon za osnovne škole u Knjazevini Crnoj Gori* [Act for primary schools in the Principality of Montenegro], *Zakon, uredba, uputstva i dr.*, Cetinje, 1884.

appointed teachers temporarily, and only if after a year the teacher proved to be properly performing his/her duty, the inspectorate confirmed him/her as a permanent teacher. However, by means of their acts (for example the decree of the Main educational inspectorate from September 6, 1886)⁴⁴ and concrete actions the authorities were trying to encourage the professional development of teachers: publishing their lectures, updating their literature, acquiring books and journals and establishing school libraries⁴⁵.

One of the old ideas was that an important means of specialisation were libraries and reading rooms. «That is why at the teachers' assembly at the beginning of 1874 a decision was made on setting up a travelling teachers' library. The war of 1876 prevented the implementation of this idea»⁴⁶. On January 1898 the Minister of Education and Church Affairs issued a Decree to the Main educational inspectorate on establishing school libraries at each school⁴⁷. Because of the poverty of teachers, schools and their being isolated, the formation of libraries went slowly. Still, the school authorities insisted on this and asked from school inspectors and teachers to report on the state of the libraries. Funds for the purchase of books came to a lesser extent from tuition fees, and mostly from the donations and gifts. School libraries, however, never achieved the expected success, because many of the books contained ideas and knowledge that could not be applied or useful to the public, teachers, and students, whose interests were also shaped by the poor living conditions.

Primary school teacher education in the period 1918-1941

Between the two world wars, teachers were educated in teacher-training schools which worked for shorter or longer periods in Danilovgrad, Cetinje, Berane and Herceg Novi.

The opening of *Teachers' school in Danilovgrad* on May 19, 1919 represents the establishment of the first school for teachers in Montenegro between the two world wars. The school stopped enrolling students in 1926 and was closed down in 1929. Its opening and activities that were conducted in this regard, virtually represented the continuation of the first school for teachers which, after the Balkan wars, was established in the areas which were annexed to Montenegro – in Pec. In fact, with the beginning of the First World War, this

⁴⁴ *Arhiv Crne Gore – MP*, 1886.

⁴⁵ Starovlah, *Shkola izmedju vlasti i slobode*, cit., p. 48.

⁴⁶ Deletic, *Ogledi iz istorije prosvjete*, cit., p. 128.

⁴⁷ Pejovic, *Razvitak prosvjete i kulture u Crnoj Gori 1982-1916*, cit., p. 87.

school stopped with its work, and as a part of newly obtained areas became a part of Serbia after the war, Montenegro remained without a school for teacher training and it started lacking teaching staff⁴⁸.

At the Teachers' School in Danilovgrad the lectures were initially organised both in the morning and afternoon since there were only two teachers who taught eight hours a day. In the beginning, but also later, the school lacked teaching staff. That is why the school had to employ individuals who did not have the necessary qualifications for the job (for instance, a postmaster who studied electrical engineering in Paris was engaged as a French teacher), which, among many other factors, inevitably affected not only the success and pedagogical competence of future teachers, but also the relationships and the atmosphere in the school.

First year, 194 male students and 17 female students were enrolled into the four classes (117 of them completed their studies). In the course of ten years of school's existence, 437 students completed their schooling. The following subjects were studied: General Pedagogy, Methodology, Psychology, School Work, Mother Tongue, Mathematics, Physics, Chemistry, Geography, General History, National History, Christian Science, Church Singing, Agriculture, Hygiene, French and Gymnastics⁴⁹.

Pedagogical department of the Senior Grammar School in Berane, which began with its work in 1919, was designed for education of future teachers in two years of schooling. The first class of 24 teachers graduated in June, 1921. This class studied within grammar school until 1925, when a *Teachers' school* was set up in Berane. The school existed for one year only. Enrolment was terminated in 1926, and the school stopped working in 1929. During the ten years of school's existence 499 teachers graduated from it.

In 1922 *Women's Teacher Training College* was opened in Cetinje and in 1925 it was turned into a mixed school (with boarding facilities for female students). In school year 1925/26 a *Teachers' school* was started in Herceg-Novi (after the cease of enrolment in Danilovgrad and Berane). This school was temporarily closed down in 1927 and re-opened in 1929. In addition to the teacher-training school in Cetinje, which worked continuously until 1941, the school in Herceg-Novi, though with interruptions, worked the longest.

At the end of the school year 1923/24, 436 students were educated in teacher-training schools (247 in Berane, of which 26 female students; 163 in Danilovgrad, of which 8 female students and 26 female students in Cetinje). That year, 0.13% of the total population was educated in these schools⁵⁰. Three

⁴⁸ R. Vukovic, *Napredni učiteljski pokret u Crnoj Gori između dva rata (1918-1941)* [Advanced Teacher Movement in Montenegro between the two world wars (1918-1941)], Titograd, Republicki zavod za unapređivanje vaspitanja i obrazovanja, 1985, p. 21.

⁴⁹ *Ibid.*, p. 28.

⁵⁰ D. Vuksan, *Škole u zetskoj oblasti školske 1923/1924*, «Lovcenski odjek», 1925, pp. 58-59.

years later, at the end of the school year 1926/27, in the four teacher-training schools, there were 500 students, including 125 female students. The schools had 48 teachers, of whom nine female teachers. 68% were children from rural areas (341)⁵¹. Finally, in 1929/30 at the schools in Herceg Novi and Cetinje 169 students were taught, including 77 girls⁵².

Primary school teacher education in the period 1944-1963

In 1944 at the Third ZAVNO Session for Montenegro and Boka⁵³ a decision was made that in the absence of expert teachers all those who «although they do not have qualifications, but have the necessary knowledge and love of the work» could be engaged⁵⁴. Numerous short-lived training courses for teachers were organised, and this was a concept and process implemented in all of Yugoslavia. «In all of the republics in the immediate post-war period, the problem of the severe lack of teachers was solved by organising three- to six-month courses in which participants quickly qualified as teachers»⁵⁵. A somewhat serious four-month course in Montenegro was held at the Teachers' school at Cetinje mid-1945 (70 took the course and 66 graduated). In late October 1945, Teachers' School in Cetinje was closed down, and its archive was transferred to Herceg-Novu, where the following (1945/46) academic year, a six-month course was organised for those who had completed at least three years of high school, and had actively participated in the national liberation⁵⁶.

After the Second World War future teachers were for the most part educated in Teachers' school in Herceg-Novu (from 1945 to 1948), which was later relocated to Niksic (from 1949/50 it operated as one-year course), as well as at teacher training courses which lasted for three, four and six months. The school in Herceg-Novu had 300 students, and on its relocation to Niksic, the number rose to 650. In spite of so many students, there was still a lack of teaching

⁵¹ D. Vuksan, *Škole u zetskoj oblastish školske 1926/1927*, «Zapisi», vol. 3, 1928, p. 180.

⁵² D. Jakshic, *Prosveta u zetskoj banovini*, «Almanah-shematizam Zetske banovine», 1931, p. 101.

⁵³ Third session of ZAVNO (*Zemaljsko antifashističko vijeće narodnog oslobodjenja* [Antifascist Council of National Liberation]) of Montenegro and Boka held in Kolashin on 14.07.1944 (*Crnogorska antifashistička skupština narodnog oslobodjenja* [Montenegrin Antifascist Assembly of National Liberation], Kolashin, CASNO, 1944, n. 1, p. 25).

⁵⁴ *Organizacija narodne vlasti u Crnoj Gori* [National organization for government in Montenegro], Kolashin, CASNO, 1944, n. 2, p. 56.

⁵⁵ E. Protner, Z. Medvesh, Sh. Batinic, S. Miovska Spaseva, I. Radeka, V. Spasenovic, S. Shushnjara, V. Zoric, N. Vujisic Zivkovic, *The Development of Teacher Training in the States of Former Yugoslavia*, in H. Nemeth, E. Skiera (edd.), *Lehrerbildung in Europa. Geschichte, Struktur und Reform*, Frankfurt am Main [etc.], Peter Lang, 2012, p. 245.

⁵⁶ M. Starovlah, *Putevi i stranputice srednje škole* [Roads and meanderings of high school], Nikshic, Unireks, 1994, pp. 67-68.

staff, especially in the northern part of Montenegro. So, in 1949 the Teachers' school was reopened in Berane, this time as a four-year course. However, the academic year 1951/1952 the school was not enrolling any first year students, as the closing down of the school had already been discussed. The school was closed down in 1954; 210 teachers graduated from it. The school was closed because it was believed that one teacher-training school, i.e. the one in Niksic, was sufficient for Montenegro at that time.

In school year 1953/1954 *Teacher-training school for housewives* was founded in Andrijevica which worked until 1961 and educated 65 female students. Andrijevica proved to be too little a place for meeting the needs of this type of school and the students were mainly trained to be professional teachers and teach the subject Household Management in primary schools.

Training and additional training of teachers who did not have complete or appropriate education continued until the school year 1962/63. That year, in Niksic even four parallel five-month courses were implemented for additional training or retraining of teachers.

It is important to note that the first college in Montenegro, i.e. Pedagogical College in Cetinje was founded on October 10, 1947. At the beginning of its work this was a two-year course, and starting from the academic year 1952-1954, the course lasted for three years. «There was a demand to quickly produce teachers for primary schools which were being renovated and set up. There were a couple of departments at the school where future teachers were being educated in subjects studied in primary schools»⁵⁷. While the school worked, 1022 full time and part time students graduated from it.

Primary school teacher education in the period 1963-1993

The fusion of *Teacher-training school in Niksic* and *Pedagogical College in Cetinje* resulted with establishing the *Pedagogical Academy in Niksic* on October 1, 1963.

Pedagogical Academy was initially designed in a specific way. It was a six-year term and the teaching was organised at two levels. The first level was a four-year high school, treated as the first stage of the newly formed Pedagogical Academy, while the second level was a two-year college. Due to the vague organisation of the newly formed Pedagogical Academy, problems emerged at the very beginning, which both the educators and students themselves had to deal with. Amongst the mentioned problems, two were most evident: first level students did not receive certificates for the completed high school and were thus unequal with their peers who had completed other high schools

⁵⁷ Ivanovic, *Škola i obrazovanje u Crnoj Gori juče i danas*, cit., p. 129.

of the same rank, and were forced to continue their education at one of the Academy's departments; the second problem was that students from all pedagogical departments were obliged to, apart from gaining their qualification proper, become qualified teachers. Thus, every teacher of Russian, philosophy or geography, had to be trained as and certified primary school teacher. Two professionals in one person.

This organisation of teacher education proved to be inadequate and inefficient and was abandoned in search for a different one. Of course, there was no return to the old concept of teachers' school despite the relatively positive experience and the results it had given. The first stage of the Pedagogical Academy was discontinued and the academy continued to develop as a two-year higher education institution⁵⁸. At the same time the problem of teacher training was solved when in 1967 a two-year *Program for Classroom Instruction* was set up. For the first time in Montenegro, teachers were educated at a university level for the first four years of primary school⁵⁹.

Undoubtedly, it was a new quality of teacher training in Montenegro, but the newly formed institution encountered numerous difficulties. Rade Delibasic (Rade Delibašić)⁶⁰ points out that until the interruption of the first stage of the Academy, A and B high school students chose to study at the Department of Classroom Instruction. Upon termination of the first stage of the Academy, a sudden shift came about. When it comes to high school students, only those who graduated from a grammar school met the requirements for admission to the Department of Classroom Teaching. However, as the grammar school students were reluctant to enrol this program, the department was practically left without adequate new generations. In short, only the weakest high school students applied for the Department for Classroom Instruction or those who failed to enrol other programs. Therefore, in the seventies of the twentieth century the Department lowered the entry criteria for high school students, and in order to ensure the continuity of the Department, students with a previously inadequate education i.e. secondary education, incomplete secondary or completed primary education could now get enrolled in case they successfully passed the qualifying or entrance exam. High school reform, whose implementation began in 1976, further worsened the quality of high school students who opted for the Department for Classroom Instruction. Practically the critical period lasted more than a decade, i.e. from 1970 until 1982 which represents a turning point. The interest in this department grew rapidly and

⁵⁸ Zakon o Pedagoškoj Akademiji, *Sluzbeni list NRCG*, 6, 1967, article 4.

⁵⁹ Ivanovic, *Škola i obrazovanje u Crnoj Gori juče i danas*, cit., p. 129.

⁶⁰ R. Delibashic, *Filozofski fakultet u Nikšiću* [Faculty of Philosophy in Niksic], Nikšic, Svetigora, 2003, p. 137.

better high school students began to opt for the teaching profession. Since then, the Department has generally been getting excellent and very good high school students.

Pedagogical Academy was transformed into the *Teachers' faculty* in 1977. Since 1979 and appearance of *The Concept of Development of Teachers' faculty*⁶¹ there was a tendency to transform the college-level teacher training course to an appropriate university degree. It was a trend and the process that took place in all of the republics of the former Yugoslavia, mostly during the seventies of the twentieth century⁶². In 1988 *Teachers' faculty* was renamed into *the Faculty of Philosophy* in accordance with the *Program for Rationalization of Higher Education and Scientific Research*⁶³. Only in the course of the school year 1992/93 preparations were made towards turning the two-year Program of classroom instruction into the four-year higher education program. Its implementation started in the academic year 1993/94.

Primary school teacher education from 1993 till the present day

Faculty of Philosophy in Niksic, a part of the state University of Montenegro (established on April, 1974 with its Head Office in Podgorica), is a complex educational and research institution which as a part of its main activities offers undergraduate and masters' studies at the *Program for Education of Primary School Teachers*, whilst organization of doctoral studies is under way. From academic year 2003/2004 the first year of studies at the University of Montenegro has at almost all university units been organized in accordance with the Bologna Declaration. In academic year 2004/2005, this model was applied to the first years of study at all university units. The application of the European Credit Transfer System (ECTS) was aimed at enabling better studying conditions and student mobility within the European academic space. Full implementation of this system was performed in 2009.

Unlike most other study programs at the University of Montenegro which are designed as 3 +2, i.e. 3 +1 +1 systems (undergraduate, specialisation and master's studies), teacher training is organised as a 4 +1 program (undergraduate and master's studies). It is important to point out that in the last ten years and

⁶¹ *Koncept razvoja Nastavnichkog fakulteta* [The Concept of Development of Teachers' faculty], Nikšić, 1979, p. 4.

⁶² Protner, Medvesh, Batinic, Miovska Spaseva, Radeka, Spasenovic, Shushnjara, Zoric, Vujisic Zivkovic, *The Development of Teacher Training in the States of Former Yugoslavia*, cit., pp. 247-249.

⁶³ *Program racionalizacije visokoshkolskog obrazovanja i nauchno-istrzivachkog rada* [Program for Rationalization of Higher Education and Scientific Research], «Prosvjetni rad», n. 9, Titograd, 1986, pp. 1-4.

depending on the demand, the department has organised studies that have had the function of additional training for teachers who graduated from teacher training colleges which used to offer two-year teacher-training programs. Through the additional two-year study they earned higher education degrees, i.e. university degrees.

One of the planned programs of study at the University of Montenegro, Faculty of Philosophy was a Study Program for *Primary School Teacher Education* in the Albanian Language which was set to start with its work in 2002/03. However, there has been a change of location and an independent *Program for Teacher Training in the Albanian Language* was set up in Podgorica. It started with its work in 2004 and currently offers four-year undergraduate teacher training studies for the first two levels of primary school in Albanian. Classes are taught by teachers from University of Montenegro (Faculty of Philosophy), University of Tirana and teachers from University of Shkodra (Albania).

Since 2005 Primary School Teacher Education has been offered at *Teachers' Faculty* in Berane, whose implementation has been entrusted to the staff and departments of the Faculty of Philosophy in Niksic.

There are two private universities in Montenegro (Mediterranean University and University of Donja Gorica) and several other higher education units, but they do not offer teacher education programs.

Concluding remarks

For a long time the harsh living and working conditions in the Montenegrin schools, low pay, poor training conditions, limited opportunities to practice research or to advance professionally, meant that the teachers from other areas were reluctant to come to Montenegro. After completing their studies abroad, many students from Montenegro did not want to return from the environments that provided them with better living standards, working conditions and advancement opportunities. On the other hand, teachers employed in government agencies and cultural institutions of Montenegro were often contributors and editors of newspapers and magazines, this being the most creative distraction from schools which increased the need for trained teaching staff. Some of these are remembered as prolific educational and cultural workers, as well as academics. Moreover, teachers accounted for the major part of intelligence in the nineteenth century and the first half of the twentieth century in Montenegro⁶⁴. The teaching profession has always had an enviable social status in Montenegro, generally not coupled with an adequate economic status, which led many teachers to finding work outside

⁶⁴ Deletic, *Ogledi iz istorije prosvjete*, cit., p. 112.

of educational institutions, i.e. primary schools. However, from the end of the nineteenth century up to now, continued efforts have been made towards the formation and development of education and teacher training, improvement of teachers' positions, greater attractiveness and profitability of the teaching job, and affirmation of the teaching profession in general.

We may conclude that the systematic and institutional training of primary school teachers in Montenegro has taken a number of specific phases with the following characteristics and challenges:

1. 1869-1914. This period was characterized by the opening of the first teacher-training secondary schools in Montenegro. Although they were primarily intended for education of future priests, nannies etc., they for the first time in Montenegro educated a significant number of male and female teachers. The religious coloration and the impact of Russian and German education on teacher-training in Montenegro weakened over time and also helped the shaping of educational models and contents that were based more on scientific grounds of pedagogical theory and practice. Also, the institutions in which teachers were educated created a significant number of intellectuals who for decades worked in schools and other important educational and cultural jobs, for diplomacy and public administration, while some preferred literary work and wrote articles in various fields. It was very important in the formation of larger professional and institutional capacity, particularly in respect of primary schools and teacher education.
2. 1918-1941. The period between the two world wars was a period of strengthening the educational capacity and the number of institutions for education of future teachers by opening four teacher training schools in all regions of the country. Also, there is a positive trend of creating mixed schools which educated boys and girls together. Although there were many problems and shortcomings in their work, teacher-training schools between the two world wars were a major step towards a systematic, professional and more science-based education of future teachers.
3. 1944-1963. Due to the post-war circumstances, this period was characterized by a lack of teacher training schools and teaching staff. As a result, the level of education of teachers was unsatisfactory due to their poor training, usually through the courses that lasted for a few months. This period was characterized by the lack of a vision and conception of institutional and systematic education of teachers, and as a result there were frequent relocations, closings and openings of teacher training schools throughout Montenegro. However, it is important to note that at this time a significant number of teachers were trained to meet the urgent needs of elementary schools. This was particularly important because of the implementation of a massive literacy scheme for both children and adults. Also, the opening of the first high school in Montenegro was of

great importance (*Pedagogical College in Cetinje*), which later laid the foundations of the university education for teachers.

4. 1963-1993. This period was characterized by a merge of institutional and human capacities for the sake of organising better teacher training (integration of Teachers' School in Niksic and Pedagogical College in Cetinje into Pedagogical Academy in Niksic). In spite of the many problems encountered, particularly in the planning and organization stage of the studies and enrolment policy, it can be argued that this period was characterized by a strong progress in the development of teacher education, which is reflected by the fact that for the first time in Montenegro real and nominal teacher education rises to the level of a college, and then to the level of higher education.
5. 1993 up to date. The most specific feature of the last two decades of development of teacher education in Montenegro is its alignment with the educational policies of the EU and close connection and cooperation with other degree programs, faculties and universities across Europe. The decision that the Program for primary school teacher training should be conceived as before, i.e. remain as a four-year program is generally considered as being the right kind of decision. In fact, considering how important and extensive teacher education is, it would be detrimental if like most other programs of study it lasted for three years. At the same time, it should be noted that in order to work in a primary school in Montenegro, teachers do not require a master's degree, as is the case with some countries in the region, but only a four-year undergraduate degree. Also, in recent years a more realistic estimate of the number of teachers needed has been produced as well as an adequate regional approach which suits the education of future teachers in their native languages. However, an important issue and a challenge remains as to whether, when and how the state university will get more competition in teacher education, i.e. whether other teacher training programs would be set up at private colleges and universities.
6. This research has shown that the systematic and institutional teacher education in Montenegro has had various forms, transformations and reforms; often has been subjected to numerous political, national, religious, ideological, economic, cultural and educational influences from the region and the countries of Europe, and gradually it has become a modern model of teacher training, compatible with most European models of teacher education.

Development of primary teacher schooling in Macedonia (1869-1963). Roots and fruits of a century-long tradition

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ABSTRACT: The article examines the development of the schools for teachers¹ in Macedonia since their origins in the middle of the 19th century up to the second half of the 20th century when this type of schools ceased to exist. During the period of almost one hundred years primary teacher schooling has undergone significant changes. The analysis is focused on the main characteristics of teacher education in several historical stages: the second half of the 19th century up to World War I, the period between the two world wars, and the first two decades of the socialist development of the Macedonian society after the Second World War. The roots of teacher education in Macedonia are to be found in the period of National Enlightenment in the mid-19th century, when Macedonia was part of the Ottoman Empire. During this period the first schools for primary school teachers were founded, with the aim of providing predominantly general and religious education. In the period between the two world wars, when Macedonia became a part of the Kingdom of Serbs, Croats and Slovenes, the teacher education was very poorly developed. Only two secondary schools for teachers existed and the education they provided was increasing progressively from 3 to 4 and 5 years. After the Second World War the institutional system of primary teacher education was established with a purpose to increase the number of students and teachers. Hence,

¹ With the changes made in the legislation in the late 1990s unified term *teacher* for all levels of education up to higher education was promoted. However, in the history of education in Macedonia, the first and for a long period the only term that designated person who taught children in primary schools was *ucitel* (master). This term was contained in the name of the first secondary schools for teachers (*ucitelski skoli*), it was the main profile of the two-year teacher colleges and, later, of the pedagogical faculties. It was even part of the name of some teacher higher education institutions. Since the late 1990s the term *ucitel* is not in use in official documents and is replaced with *class teacher* or similar terms. Nevertheless, it is still to be found in some of the primary school textbooks. In this article, the English term primary school *teacher* refers to the first term *ucitel*, not to its successors.

during the period of socialist development of Macedonia within the Yugoslav Federation the system of teacher education gradually expanded in duration and level of training: from four-year secondary schools through two-year post-secondary teacher training colleges, later renamed in Pedagogical Academies.

EET/TEE KEYWORDS: Teacher Education; College of Education; Curriculum Development; Educational System; Educational Policy; Macedonia; XIX-XX Centuries.

Setting the scene: historical overview of the schooling until mid-19th century

The education in Macedonia is deeply rooted in the history of the Macedonian people and its centuries old cultural traditions. Its origins are to be found in the late 9th century when St. Clement of Ohrid, one of the closest disciples of the holly brothers Cyril and Methodius, founded in Ohrid the first school in Macedonia and in the wider region². During the seven years of its existence (886-893) more than 3,500 teachers and priests were trained to spread literacy and establish the Christianity throughout Macedonia. Consequently, St. Clement of Ohrid represents the generation of Macedonian educators who preserved and continued the tradition of the Pan-Slavonic work of Cyril and Methodius and strengthened the awareness of the Slavs as an equal and active participants in the civilized world.

Up to the 19th century, the development of the education in Macedonia was marked by two main characteristics:

- *Religious character of schooling*: for more than ten centuries it was directly connected to monasteries which played an important role in the preservation of the cultural identity of the Macedonians.
- *Teaching in foreign languages*: the history of Macedonian education is a history of schools founded by outside powers to spread foreign propaganda within Macedonia, attempting to convert Macedonians to other ethnicities by imposing classes in foreign languages.

During the period of Turkish rule (15-19th centuries) the opportunities for development of schooling and education in Macedonia were very unfavourable. Monasteries were the only centres of literacy and culture that continued the tradition of copying liturgical manuscripts and, at the same time, played the role of primary schools. These schools are known as *cell schools* and they were the only educational centres in many towns in Macedonia until the mid-19th

² S. Antoljak, *Srednovjekovna Makedonija* [Middle-age Macedonia], Skopje, 1985, Vol. I, p. 211; B. Panov, *Misionerskata dejnost na Kliment Ohridski vo Makedonija* [Missionary work of Klement of Ohrid], in *Kliment Ohridski i ulogata na Ohridskata knizevna skola vo razvitokot na slovenskata prosveta* [Klement of Ohrid and the role of the Ohrid school in the development of the Slavic literacy], Skopje, MANU, 1989, p. 311 (in Macedonian).

century. According to the available data, in 16th and 17th century there were 44 monasteries in Macedonia within which primary schools operated³. They provided basic literacy, and at the same time children studied church singing, religious order and services, and some crafts (such as bookbinding). As a result of the influence of Constantinople Patriarchy that had privileged position in the Ottoman Empire, Greek language was imposed for use in churches and schools. This pressure especially increased with the abolition of the Ohrid Archbishopric in 1767. But, even then, the monasteries managed to preserve the old Slavic literacy and tradition, and cell schools continued their work. Actually, besides monastery schools, during the 18th and 19th century other types of cell schools were opened:

- *Church cell schools* at the beginning of the 18 century with the same religious character as monastery cell schools.
- *Private cell schools* in the mid-18th century were founded in economically more developed cities by literate artisans who taught children some practical knowledge.
- *Municipal cell schools* at the beginning of the 19th century. Their opening represents significant step in the development and democratization of education in Macedonia: schooling was free and the schools were founded and maintained by the local church and school municipalities. The first such school was opened in 1810 in Veles, a town in central Macedonia, and it provided education for both boys and girls. Municipal schools soon became the most widespread schools in all towns and villages in Macedonia.

In all types of cell schools teachers were mostly priests or craftsmen who were practicing teaching as additional job. They had poor educational background and worked in bad conditions: with almost no furniture inside the room and without any books and teaching materials. Still, their work is of great historical and cultural significance because they were teaching in people's mother tongue and thus contributed to the preservation of the spirit and traditions of the Macedonians.

Education in the period of the national Enlightenment in Macedonia

The mid-19th century is very important stage in the history of Macedonian people, as well as in the history of the Macedonian schools and education. It covers the period from the 30s to the 70s of the 19th century during which the

³ R. Kantardziev, *Istorija na obrazovaniето i prosvetata vo Makedonija* [History of Education in Macedonia], Skopje, Prosvetno delo, 2002, p. 93 (in Macedonian).

conditions for spiritual and national revival of the Macedonian people were created. Three of those conditions are crucial for the education in this period: the socio-economic development, especially the development of crafts and trade; strengthening of the Macedonian towns and forming of the middle-class that was gradually becoming significant social and economic factor of the cultural and educational development; and the cultural influences from the Western Europe which penetrated in Macedonia through the neighbouring countries of Greece, Bulgaria and Serbia. As a result of these processes the two already mentioned characteristics of education of the previous period were undergoing a radical change:

- Instead of religious, new *secular* schools emerged and rapidly developed, substituting gradually the cell schools.
- Instead in foreign languages, teaching was delivered in Macedonian. The inherited tradition in the preservation of the Macedonian language in the schools has played a crucial role in the formation of the national consciousness and identity of the Macedonian people in the late 19th century.

The first secular schools in Macedonia were Greek, with instruction in Greek language. They were established in the 30s, after the liberation of Greece in 1821, in the towns of southern and western Macedonia where the Greek influence was dominant. Around the middle of the 19th century, when the movement against the Greek influence was intensified, secular schools with teaching in Macedonian language started to appear. The first such schools were established in Veles (1838), Stip (1840) and Skopje (1848). Their number was constantly increasing, as well as their significant impact in the social life. At the end of the 70s secular schools in Macedonian language operated in almost all Macedonian cities and larger villages⁴.

There were two types of secular schools: primary schools (called *zaemni*, which means *shared teaching*) and middle schools (called *class* schools because students were grouped in classes). The primary schools were organized on the principles of the Bell-Lancaster system of work: the teacher had older students as assistants who taught younger students under his guidance. This teaching method was a way to handle with the shortage of teachers. In addition to basic literacy (reading, writing, and arithmetic) students were given the fundamental knowledge of grammar, geography, arithmetic, history and church history. The primary schools lasted two or three years and they were first set up in Veles (1837) and Skopje (1848).

The middle schools were lower vocational schools for students who had completed primary education. The first class school with teaching in Macedonian language was opened in 1857 in Veles. This type of school lasted

⁴ R. Kantardziev, *Makedonskoto prerodbensko uciliste* [Schools in the period of Enlightenment in Macedonia], Skopje, Studentski zbor, 1985, pp. 39-41 (in Macedonian).

2, 3 or 4 years, depending on the conditions for school work and possibilities to find teachers who were competent to teach on a higher level. There was not unified curriculum for different class schools.

The establishment of the secular school system in Macedonia directly influenced the appearance of the teaching job as separate and autonomous profession. Compared to the cell schools, in secular schools a larger number of students were gaining more profound knowledge, and the teaching organization and methodology were more complex. Therefore, a need arose for a specially prepared people who would do teaching as their only job. Still, the first secular teachers were not much different from the teachers of cell schools. At best, they had completed the middle school and possessed basic knowledge in the field of sciences that they had acquired during their education. At that time a large number of Macedonian teachers got their education in the schools of the neighbouring Slavic countries (Serbia, Bulgaria) and Russia. Teacher training in the schools in Macedonia initiated during the 60s and 70s of the 19th century. In this period several generations of competent and innovative teachers walked out of the first Macedonian schools for teachers. However, the need for qualified teachers was still great, and that is why in some towns and villages in Macedonia cell schools were still working besides the secular ones.

During the period of the National Enlightenment there was no central government that would take charge of the organization and funding of the schools in Macedonia. On the contrary, the operation and management of schools were decentralized. There were state laws that regulated the education of the Muslim population of the Turkish Empire, but not the education of the Christians. According to the decree of 1857 released by the Patriarch of Constantinople, Christian municipalities in Turkey were allowed to create municipal councils in which participated both religious and secular people. As a consequence, this Tanzimat act intensified the process and movement of the emancipation from the Patriarchy⁵.

Schools in Macedonia were developing in heterogeneous conditions, according to the local financial resources and professional skills of teachers. The basic form of local self-government was a church-school community. These local education authorities were the expression of the struggle of the Macedonian people for the liberation from the Greek influence. They were given the right to self-regulate and manage the religious, educational and social issues of the people living in the diocese territory. Although they were not formally recognized by the Turkish government, they were working in a legal manner and were independent in municipal decision-making.

⁵ M. Karahasan, *Obrazovaniето vo Makedonija vo vremeto na Tanzimatot* [Education in Macedonia during the Tanzimat reform], in Lj. Lape (ed.), *Skolstvoto, prosvetata i kulturata vo Makedonija vo vremeto na prerodbata* [Schooling, education and culture in Macedonia in the period of Enlightenment], Skopje, MANU, 1979, pp. 645-660 (in Macedonian).

The educational issues were in competence of the school board, which acted independently, but was accountable to the municipality and submitted regular reports to it. Its main task was to take care of the material needs of the school: preserve the entire school property, purchase textbooks and guidebooks, hire teachers and provide their salaries, give support to the poor students etc.

Beginnings of teacher education (1869-1914)

The teacher education in Macedonia was born in the period of the National Enlightenment, in the conditions of expansion and struggles for national and cultural emancipation. Its historical roots are in the middle of the 19th century when Macedonia was still a part of the Turkish Empire. The inducement for its development was given by the appearance of the first secondary schools, which was a result of the economic growth of the Macedonian towns in that time and the increasing interest of the newly formed Macedonian middle class for higher education.

The first school for teachers was founded in 1869 in Stip, a town in the eastern part of Macedonia. Its founder was Josif Kovacev, one of the most significant representatives of the period of the National Enlightenment. The school of Kovacev was the first vocational school in Macedonia that was preparing primary school teachers in two years. Students were taught in general and religious subjects and that is why it was called *pedagogical and theological school*⁶. This school became very popular in Macedonia and the wider region because of the new class and subject system of schoolwork and innovative teaching methodology that was introduced. Actually, Kovacev was the first in Macedonia who imported from Russia the phonetic analytical-synthesis' method of teaching language literacy and wrote the first textbook for primary students based on this methodology⁷. At the same time he was organizing training courses for teachers who wanted to adopt the new teaching methodology. Therefore, his school in Stip became a centre where teachers from Macedonia and Bulgaria were trained, and then contributed to spreading the new phonetic method in their schools.

In the following years Kovacev founded another school for teachers in Prilep that lasted only 3 years (1874-1877). Even though the religious character of the education was present too, the priority was given to the pedagogical

⁶ R. Kantardziev, *Josif Kovacev-osnovac na prvite pedagogski ucilista vo Makedonija* [Josif Kovacev-founder of the first pedagogical schools in Macedonia], «Prosvetno delo», n. 7-8, 1966, pp. 36-37 (in Macedonian).

⁷ R. Kantardziev, *Prvot bukvar izraboten po glasovnata analiticko-sinteticka metoda vo Makedonija (1875 god.)* [The first primary textbook in Macedonia based on phonetic analytical-synthetic method], «Prosvetno delo», n. 5-6, 1966 (in Macedonian).

subjects, especially to the methodology of the primary teaching. In both schools Kovacev introduced new teaching tools and textbooks thus contributing to the improvement of the organization and methodology of the primary education in Macedonia.

Kovacev schools, as well as the other schools in this period were municipal schools administered by the church-school municipalities. Even though several generations of teachers were educated in Kovacev schools, still the shortage of teaching staff in this period contributed to co-existence of the modern secular and the 'old-fashioned' religious schools which were dominant in the first half of the 19th century.

After the Berlin congress (1878) schooling in Macedonia continued to develop under the Turkish rule, but in terms of increased competitive efforts of the Greek, Serbian and Bulgarian bourgeoisie to achieve the largest possible influence in Macedonia. For this reason a large number of educational institutions in Greek, Bulgarian and Serbian language were founded. The number of different type and level of schools increased significantly. According to some statistics at the beginning of the 20th century there were 1,375 Greek schools, 303 Serbian schools and 781 Bulgarian schools in Macedonia⁸. There was not a high quality teaching in these schools because of the insufficient pedagogical and methodological preparation of the teachers. Teacher education was provided by few teacher schools that had status of secondary vocational schools, as well as by teacher classes within several gymnasia. The most popular was the secondary school for teachers in Skopje that was founded at the end of the 19th century. It was the first three-year teacher school in Macedonia and it was active until the beginning of the first Balkan war.

The partition of Macedonia after the Balkans wars between Bulgaria, Greece and Serbia meant the ban of the use of Macedonian in schools, and imposing of Serbian, Bulgarian or Greek as teaching language. Macedonian church-school community and Macedonian schools were abolished. At that time the first state regulation of education in different parts of Macedonia was established. On the territory of present-day Macedonia the first laws in the field of education were established by the Kingdom of Yugoslavia.

Teacher Schools between the Two World Wars (1918-1941)

After the First World War the part of Macedonia that was under the rule of Serbia became a part of the Kingdom of Serbs, Croats and Slovenes, founded in 1918, and later of the Kingdom of Yugoslavia. It was named as Vardar's

⁸ Kantardziev, *Istorija na obrazovanieto i prosvetata vo Makedonija* [History of Education in Macedonia], cit., pp. 331-365.

Macedonia and compared to other territorial entities (so called *banovinas*) it represented the most underdeveloped area of the kingdom. Macedonians were treated as South Serbs and Macedonian language and culture were not recognized. Consequently, since the education represented a tool for realization of the political agenda, Macedonians didn't have right to education in mother tongue.

The system of education in Macedonia in the pre-war Yugoslavia was characterized by dualism, selectiveness and lack of institutional setting. The preschool, higher education and special education were not developed at all, the network of secondary schools, both gymnasias and vocational schools, was poorly developed, while the in-take of children of age 7-11 in the four-year compulsory primary education was only 46,2%⁹.

According to the data, in 1939 in Macedonia there were 289 schools without teachers, in 1940/41 the number raised to more than 500, while more than 250 primary schools were closed¹⁰. In the school year 1939/40 there were 850 primary schools with 95 010 students and 1,561 teachers¹¹. Teacher-student ratio in this school year compared to the previous years was significantly increased from 1:42,2 to 1:60,9 which indicates the lack of qualified teaching staff and educational institutions that will train them. These data indicates that the political establishment of the Yugoslav federation had no interest in developing the network of primary schools and of raising the cultural and educational level of the population in Macedonia.

This lack of interest was evident also regarding the preparation of teachers in Macedonia. In this period there were only two secondary schools for teachers: in Skopje and in Prilep (the latest lasted only six years: from 1923 to 1929). It was a very limited number compared to the one in the other parts of Yugoslavia and to the total number of teacher schools: 24 in the immediate years after the foundation of the Kingdom and 46 in 1928/29¹². As a result of this situation in the three districts of Vardar's Macedonia there were unfavourable conditions for creating teacher intelligentsia that would lead the struggle for change and improvement.

The teacher school in Skopje was founded in 1898. In the school year 1913/14 there were 287 students that graduated from this school, and the number of

⁹ *Osnovni statistički podaci o razvoju i stanju školstva u FNRJ* [Fundamental statistical data on development and situation on schooling in the Federative People's Republic of Yugoslavia], Dokumentacija uz Deklaraciju o sistemu obrazovanja i vaspitanja u FNRJ, Belgrade, [s.n.], 1957, p. 7 (in Serbo-Croatian).

¹⁰ Kantardžiev, *Istorija na obrazovanieto i prosvetata vo Makedonija* [History of Education in Macedonia], cit., p. 461.

¹¹ K. Kamberski, *Od bukvar do univerzitet* [From primer to university], Skopje, Prosvetno delo, 1994, p. 19 (in Macedonian).

¹² M. Krstić, *Razvoj učiteljske škole u Jugoslaviji od 1918-1938* [Development of teacher schools in Yugoslavia 1918-1938], in M.R. Majstorović, *Pedagoška Jugoslavija 1918-1938*, Belgrade, Štamp. Privrednik, 1939 (Pedagoška biblioteka; 9), pp. 292-298 (in Serbian).

teachers was 15. In the following year the number of students decreased to 85, while the one of teachers rose to 18¹³. During the war the school was relocated in Prizren, but since 1918/19 it was reopened in Skopje. At the beginning the teaching was organized in courses that lasted 3, 6, 12, 18 and 24 months. During the next two decades the duration of the teacher education gradually expanded to three years (up to 1924/25), four years (1925/26-1928/29) and five years (1929/30). The last change of five-year study was introduced by the Law on teacher schools that was adopted in 1929, which finally brought the countries of the Kingdom of Yugoslavia their first unified legislative regulation of teacher training in both content and organization¹⁴.

The teacher school in Skopje was mixed, for boys and girls, even though they studied in separate classes and lived in separate sections of the school dormitory. The number of students was gradually increasing: from 122 in 1920/21 to 338 in 1925/26 and 257 in 1928/29¹⁵. More than 40% of the students of this school were from Macedonia, but all of them were registered as Serbs, Croats or Slovenes. Most of the students were coming from poor families and had to pay scholarship. The teaching was delivered in Serbian, and the textbooks that were used in the school were in the same language, too. In the school year 1940/41 in teacher school in Skopje there were 401 student enrolled and 28 teachers that worked with them¹⁶.

The greater part of teachers in the school had secondary education, and only few of them had a university degree. Almost all of them were Serbs and few were Croats and Russians. Some of the teachers were part-time professors of the Faculty of Philosophy in Skopje, which, at that time, was the only higher education institution in Macedonia (founded in 1920 as a branch of the Faculty of Philosophy in Belgrade). The educational background of teachers of Skopje school reflects the overall law qualification structure of secondary teachers in Vardar's Macedonia. However, this situation in the following years was gradually improving: the percentage of non-qualified teachers decreased from 48% in 1923/24 to 30% in 1928/29¹⁷.

¹³ M. Jovanovic, *Prosvetno-politickite priliki vo Vardarska Makedonija (1918-1929)* [Educational and political conditions in Vardar's Macedonia], Skopje, Student. Zbor, 1983, pp. 226 (in Macedonian).

¹⁴ E. Protner, Z. Medves, S. Batinic, S. Mlovska-Spaseva, I. Radeka, V. Spasenovic, S. Susnjara, V. Zoric, N. Vujisic-Zivkovic, *The Development of Teacher Training in States of Former Yugoslavia*, in A. Nemeth, E. Skiera (edd.), *Lehrerbildung in Europa. Geschichte, Struktur und Reform*, Frankfurt am Main [etc.], Peter Lang, 2012, p. 243.

¹⁵ Jovanovic, *Prosvetno-politickite priliki vo Vardarska Makedonija (1918-1929)* [Educational and political conditions in Vardar's Macedonia], cit., pp. 228-229.

¹⁶ *Skolstvo u FNR Jugoslaviji, 1945-1946 do 1950-1951 godine* [Schooling in the Federative People's Republic of Yugoslavia], Belgrade, Savet za nauku i kulturu Vlade FNRJ, 1952, pp. 82-84 (in Serbo-Croatian).

¹⁷ S. Markovic, J. Ivanovic, *Skolstvo juzne Srbije od 1912-1937* [Schools in South Serbia from 1912 to 1937], in *Spomenica dvadesetpetogodisnjice oslobodjenja Juzne Srbije 1912-1937*, Skopje, [Južna Srbija] 1937, p. 942 (in Serbian).

All teacher education institutions in Yugoslavia were implemented the same curriculum that was adopted in 1931. Its overview is given in the table below¹⁸:

Table 1. *Curriculum for teacher schools in Yugoslavia*

<i>Subjects</i>	Teaching hours by years of study				
	I	II	III	IV	V
Psychology with logics	-	-	4	-	-
General pedagogy	-	-	-	4	-
History of pedagogy	-	-	-	-	2
Teaching methodology	-	-	-	2	2
School practice	-	-	-	4	6
School organization and administration	-	-	-	-	1
People's economy and foundations of sociology	-	-	-	-	2
Religious education	2	2	2	2	2
People's language	4	4	3	3	3
Foreign language	3	3	3	3	2
History	2	2	2	3	2
Geography	2	2	2	-	1
Science	3	2	2	2	-
Chemistry with technology	2	2	-	-	-
Physics	3	3	3	2	-
Mathematics	3	3	3	2	-
Hygiene	-	-	-	-	2
Agriculture and household	2	2	2	-	-
Singing	1	1	1	1	1
Playing instrument	2	2	1	1	-
Manual work	2	2	2	-	-
Gymnastics	2	2	2	2	2
<i>Total</i>	33	32	32	31	28

The main attention in the curriculum was given to the national and pedagogical subjects. Serbian language and literature, history and geography were the most important subjects for the formation of the students in the spirit of the Yugoslav unity, while the pedagogical subjects (general pedagogy, history of pedagogy and teaching methodology) were essential for preparation of teachers. The largest share of teaching hours was given to the practical work

¹⁸ *Povijest školstva i pedagogije u Hrvatskoj*, Zagreb, Pedagoško-književni zbor, 1958, p. 340 (in Croatian).

in primary classes that usually were part of the teacher schools. The school in Skopje at the beginning didn't have any, but later practice class was attached to it as a place for practical training of the students.

Compared to other regions of the Kingdom where in this period the reform movements of the new education were entering from the western countries in Europe, such as Kerschensteiner *Arbeiterschule*, Ferrier active school, Montessori methods¹⁹, in the schooling in Macedonia at that time teachers were still practicing pedagogical principles of Herbart and his disciples. His universal scheme of the four formal degrees was the main tool for structuring the teaching process in the teacher school in Skopje and the future teachers were trained to implement this type of teaching organization.

Teacher schools in the socialist Macedonia (1944-1963)

When Macedonia became a part of the Yugoslav Federation after the Second World War, it inherited a formed, but slowed down school system, with a poorly developed school network, with uneven distribution of the schools that were run by insufficient number of teachers, and with very short compulsory education of 4 years. Therefore, during the next fifty years of the socialist development, the education in Macedonia was aimed towards:

- increasing the educational and cultural level of the population (48,8% of the population above the age of 10 was illiterate)²⁰;
- extending and equally distributing the school network on all levels of education;
- increasing the number of students and teachers.

In the immediate post-war period, great efforts were made to eliminate the illiteracy and to increase the enrolment of the students in the compulsory primary education. One of the serious problems that impeded the successful realization of these goals was the severe lack of professionally qualified teaching staff. In the beginning of the school year 1944-1945 in Macedonia there were only 337 teachers with formal pedagogical education and 28 graduated professors, while for the normal functioning of the schools there was a need of 3,000 to 3,500 teachers²¹. Therefore the Presidium of the first Macedonian Assembly (Antifascist Assembly of the National Liberation Of Macedonia-ASNOM) made several decisions for overcoming the problem of lack of teachers:

¹⁹ *Ibid.*, pp. 356-357.

²⁰ *Statisticki godisnik na SRM* [Statistical Yearbook of the Socialist Republic of Macedonia], Skopje, Republicki zavod za statistika, 1968, p. 61 (in Macedonian).

²¹ A. Hristov, M. Todorovski, N. Veljanovski (edd.), *ASNOM, Dokumenti* [ASNOM, Documents], Skopje, Arhiv na Makedonija, 1984, Vol. I, book 2, p. 446 (in Macedonian).

- all teachers were released from the army so that they could work in schools²²;
- all students that graduated from VI, VII and VIII class of gymnasium and attended one-month pedagogical course could work as teachers;
- all students graduated from V class had to attend short teacher courses and work as teachers 1 to 2 years²³.

Besides these measures, the efforts were made for the establishment of institutions for teacher preparation right after the War. The first secondary school for teachers in the post-war Macedonia was founded in 1945 in Skopje and in the next five years three more were opened: in Bitola, Stip and Tetovo. Three of them were the first teacher education institutions in which students learned in Macedonian language while in the one in Tetovo (later relocated in Skopje) the teaching language was Albanian. In 1950/51 there were 1,410 students enrolled in the four teacher schools²⁴. They provided education that lasted three or four years, and two generations (1953/54 and 1954/55) followed five-year program. These schools prepared teachers for the lower classes (first to fourth grades) of primary education (class teaching). The curriculum consisted of general education, pedagogical, psychological and art subjects.

The four teacher schools, especially the one in Skopje, soon became centres of continuous education during the whole year. There was no winter and summer break for Skopje teacher school, after finishing the regular classes there were different types of courses (full-time and part-time courses with different duration and curricula) that were organized for students with different educational background. At the end of the first summer course in 1945, there were 412 graduated teachers from the teacher school in Skopje, out of which 369 were Macedonians, 13 Albanians and 30 Turks²⁵. In the following years, as a result of the need to satisfy the rapid development of the primary education in Macedonia, new teacher classes were established within many gymnasia in different towns throughout Macedonia. Hence, the number of qualified teachers in the 40s and 50s was constantly increasing and the quality of teaching was gradually improving. As an illustration, at the end of the school year 1954/55 there were 1,990 graduated students from the teacher schools in Macedonia²⁶. However this number of qualified teachers was still not enough to satisfy the needs of the society.

²² *Ibid.*, p. 313.

²³ N. Veljanovski (ed.), *ASNOM, Dokumenti* [ASNOM, Documents], Skopje, Arhiv na Makedonija, 1987, Vol. I, book 3, pp. 36-37 (in Macedonian).

²⁴ Kamberski, *Od bukvar do univerzitet* [From primer to university], cit., p. 103.

²⁵ D. Veljkovik, *Skoluvanjeto na nastavnickiot kadar za osnovnite ucilista* [Education of primary school teachers], in N. Andovska (ed.), *Vospitaniето i obrazovaniето vo Makedonija* [Upbringing and Education in Macedonia], Skopje, Prosvetno delo, 1985, p. 103 (in Macedonian).

²⁶ Kamberski, *Od bukvar do univerzitet* [From primer to university], cit., p. 104.

The dynamic growth of the primary schooling in Macedonia in the first decade after the liberation is evident from the table below:

Table 2. *Comparison of primary schooling in 1939/40 and 1957/58*²⁷

<i>Primary education</i>	<i>1939/40</i>	<i>1957/58</i>
<i>Schools</i>	850	1 692
<i>Classes</i>	1 808	6 182
<i>Students</i>	95 010	201 768
<i>Teachers</i>	1 561	6 144
<i>Students per class</i>	52,6	32,6
<i>Student-teacher ratio</i>	60,9	32,8
<i>Student enrolment (age 7-14)</i>	46,2%	77,2%

A profound shift in the concept of teacher education took place with the legislation that introduced the unified eight-year primary schooling in Yugoslavia. The reform of the primary education in Macedonia was based on the General Law on Education that was promulgated at federal level in 1958 and on the 1959 Law on Primary schooling that legitimized eight-year compulsory primary education in Macedonia²⁸, According to the law regulation new curriculum was introduced that contributed to the qualitative development of the primary education. As a result of the reform activities, in 1958/59 compared to the school year 1950/51, the number of students of age 11-15 increased 69,7%, and the number of teachers that were educated in teacher schools increased for more 100%²⁹.

The activities for spreading the primary school network and expanding the duration of compulsory schooling were closely connected to initiatives to raise the level of teacher education. Actually, beginning from 1947/48, post-secondary teacher training colleges (two-year colleges of pedagogy) were created. The first one was set up in Skopje in 1947 as an institution of the Ministry of Education with the aim to «prepare teachers for the lower classes of the secondary schools and upper classes of the primary schools, as well as educators for the students' homes and dormitories»³⁰. This institution had two departments: for teachers

²⁷ *Osnovni statistički podaci o razvoju i stanju školstva u FNRJ* [Fundamental statistical data on development and situation on schooling in the Federative People's Republic of Yugoslavia], cit.; *Statistički godišnik na SRM* [Statistical Yearbook of the Socialist Republic of Macedonia], cit.

²⁸ *Zakon za osnovnoto uciliste* [Law on Primary Schooling], «Sluzben vesnik na NRM» [Official Gazette of the People's Republic of Macedonia], n. 35, 1959 (in Macedonian).

²⁹ Kantardziev, *Istorija na obrazovanieto i prosvetata vo Makedonija* [History of Education in Macedonia], cit., p. 568.

³⁰ *Uredba za osnovanje visa pedagoska skola vo Skopje* [Decree for establishment of Teacher college in Skopje], «Sluzben vesnik na NRM», n. 31, 1947, p. 312.

and for educators. Department for teachers was providing five areas of study: Macedonian language and literature, Russian and Serbian language, History and Geography, Biology and Chemistry, and Mathematics and Physics. In the first academic year there were 66 enrolled students, and in the following years the number of students was constantly increasing³¹. The Pedagogical college in Skopje was also important for the preparation of teachers of Albanian and Turkish language and since 1965/66 teaching process was organized as bilingual: in Macedonian and Albanian.

The pedagogical school in Skopje remained the only two-year college in Macedonia during the next 10 years (in comparison, in 1951 in the Yugoslav Federation there were 21 such colleges)³². This situation indicates that at that time there was still not clear vision of the role, importance and status of these institutions in the system of higher education, which is also evident from the legal regulation for establishment of the first college in Macedonia³³. The development of the two-year colleges was intensified during the 60-ies with the adoption of the Law on establishment of the advanced vocational schools in Macedonia in 1960³⁴ and the Law on Higher education in Macedonia in 1961, which made the advanced school become an integral part of the higher education system in the country³⁵.

In 1959/60 the second teacher college was opened in Stip as a first higher education institution of the same type outside of Skopje. In 1961 both colleges in Skopje and Stip were renamed in Pedagogical Academies and in 1963/64 the new, third one was opened in Bitola. The pedagogical academies had a status of higher education institutions of first level and they responded to two growing needs of the Macedonian society to:

- provide comprehensive education for all teachers of the 8-year primary schools. Therefore besides the preparation of teachers for the upper classes (grades 5-8) of the primary education (subject teaching), pedagogical academies became responsible for the preparation of the class teachers (grades 1-4) as well. In comparison with the previous system, this was quite innovative, as training of class teachers and subject teachers was brought into line.

³¹ Kamberski, *Od bukvar do univerzitet* [From primer to university], cit., p. 114.

³² *Ibid.*, p. 114.

³³ There were three decrees on establishment and operation of the first college in Skopje: *Uredba za osnovanje visa pedagoska skola vo Skopje* [Decree on establishment of higher pedagogical school (HPS) in Skopje], «Sluzben vesnik na NRM», n. 31, 1947; *Uredba za VPS vo Skopje* [Decree on HPS in Skopje], «Sluzben vesnik na NRM», n. 30, 1948; *Uredba za VPS vo Skopje* [Decree on HPS in Skopje], «Sluzben vesnik na NRM», n. 19, 1949.

³⁴ *Zakon za osnovanje na visi strucni skoli* [Law on establishment of advanced vocational schools], «Sluzben vesnik na NRM», n. 32, 1960.

³⁵ *Zakon za visokoto školstvo vo NRM* [Law on higher education in the People's Republic of Macedonia], «Sluzben vesnik na NRM», n. 20, 1961.

- raise primary teacher qualifications from secondary to a higher education level. That is the main reason why the secondary schools for teachers gradually ceased to exist. This type of schools operated until the school year 1963/64 when the education of class teachers was entrusted to the Academies³⁶.

Rising of primary teacher education on a higher level was a necessary consequence of the socio-political and educational development in Macedonia and Yugoslavia during the 60-ies of the last century. Still, the closing down of the secondary schools for teachers meant the end of the continuity of teacher preparation, because instead of extension of teacher vocational education from four to six years, it was shortened to only two-year study in college. In other Yugoslav republics the previous five-year teacher schools were mostly reshaped into four-year high school pedagogical courses, which were more comprehensive in nature, such as vocational schools³⁷.

Conclusion

The schools for teachers have played an important role in the history of education in Macedonia. They represented a crucial factor for developing teaching staff for primary schools and for raising the cultural and educational consciousness of the population in Macedonia. The analysis has shown that teacher schools in Macedonia in different historical periods had the same task: to respond to the needs of society for qualified teaching staff. The overview of the historical development of teacher training allows us to identify the move towards an increasing level of education that follows two lines:

- lengthening of the duration of the teacher schools: they started as two-year schools and gradually the training was extended to three, four and five year- study;
- raising the level of teacher qualifications from secondary to higher education institutions. This shift was done with the introduction of the pedagogical academies that gradually took the place of the secondary schools for teachers.

During the hundred years of their existence, teacher schools were facing the same difficulties: poor facilities, lack of textbooks and teaching materials,

³⁶ *Preporaka za pobruvanje sistemot na nastavniot kadar vo osnovnite ucilista* [Reccomandation for improving the system of teaching staff in primary schools], «Sluzben vesnik na SRM» [Official Gazette of the Socialist Republic of Macedonia], n. 31, 1963, p. 597 (in Macedonian).

³⁷ Protner, Medves, Batinic, Mlovska-Spaseva, Radeka, Spasenovic, Susnjara, Zoric, Vujisic-Zivkovic, *The Development of Teacher Training in States of Former Yugoslavia*, cit., p. 246.

especially in mother tongue, lack of facilities for practical work. Still, they succeeded to earn a solid reputation based on teachers' hard work and their commitment to innovate the organization and the methodology of the teaching process.

The teacher schools in Macedonia had another important mission that needs to be emphasized: they actively participated in the socio-political and cultural life in the towns and regions where they operated. As carriers of the secular education in the period of Enlightenment they were empowering the newly-formed middle class to fight against the foreign influences and to preserve the cultural traditions and national identity of the Macedonian people. In the period between the two world wars, in the late 30s, within the only teacher school in Skopje there was an illegal communist organization formed as a centre of resistance to the dominating influence of the Serbian politics toward Macedonian people. Thus, many teachers that graduated from this school were actively engaged not only in the process of education of the illiterates, but in the revolutionary activities for their national and social rights as well. Finally, in the period after the liberation of Macedonia, teacher schools were fostering places where primary school teachers and teaching staff for pedagogical academies and different faculties were prepared. From the foundation of the first teacher school in 1945 up to the closing down of these institutions in 1964 there were 11,042 graduated teachers, out of which 8,357 were Macedonians, 2,354 were Albanians and 331 were Turks³⁸. They prepared the ground for higher level institutions for teacher education, but at the same time these teachers had enormous contribution to the election activities in Macedonia, to the collective efforts for the emancipation of the women, to the voluntary actions for revitalization and building up of the country. Therefore, teacher schools and teachers they prepared not only established the foundations of the Macedonian education, culture and science, but represented driving forces of the Macedonian social and political life as well.

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³⁸ Veljkovik, *Skoluvanje na nastavnickiot kadar za osnovnite ucilista* [Education of primary school teachers], cit., p. 105.

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Elementary school teachers in Milan during the Restoration (1814-1859): innovations and improvements in teacher training

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ABSTRACT: After decades of negative interpretation, it is nowadays clear that in the Restoration age the elementary school system in Lombardy experienced both a quantitative and a qualitative improvement, which was impressive and long-lasting. The essay, after recollecting the increased number of elementary schools and pupils and the differences in boys' and girls' statistics, which show the great improvement in female literacy, highlights the qualitative amelioration of teacher training, from the Normal method in Joseph II's and in Napoleonic age to Milde's pedagogy in the Restoration. The Normal School of Milan and its director Francesco Cherubini's action (who was the translator of Peitl's books for teachers) are analyzed with new archival sources, among which relevant are also the files of the examinations of candidate teachers in Milan, which show how the preparation got deeper and wider. The municipality of Milan appointment criteria are taken into account, too: they prove both the slowness of the teaching career and the control on merit. Finally, the appearance of female elementary school teachers, well prepared and keen, opened in Milan and Lombardy a new, highly requested job for women.

EET/TEE KEYWORDS: Educational Reform; Education System; Primary School; Teacher Training; Women's Education; Italy; XIX Century.

Italian historiography has long depicted Austrian school policy in the Kingdom of Lombardy and Venetia as a negative one: politically conservative, with a strong power given to censorship, aimed at a re-confessionalization of society. National aspiration were suffocated, intellectuals and patriots who were involved with mutual schools and infant schools were suspected, put under arrest or had to flee in exile. The Italian historiography has long

been conditioned by a national bias against Austria, and it is to mention also the ideological prejudice against a Catholic domination. Both these bias are rooted in the Italian Risorgimento and particularly in the after '48 liberal opinions. Nonetheless these theses have been gradually overcome by years of studies, which have shifted the attention from the greatest intellectuals and educationalists, such as Carlo Cattaneo, Federico Confalonieri or Ferrante Aporti, to other issues: the literacy level, the quantitative history and, more recently, the question of teacher training¹. It is nowadays clear that in the Restoration age the elementary school system in Lombardy experienced both a quantitative and a qualitative improvement, which was impressive and long-lasting.

Increased number of elementary schools and pupils

Xenio Toscani's works have proved the powerful increasing number of elementary schools opened under Austrian dominion in Lombardy. Between 1775 and 1796 in the Duchy of Milan the number of *Trivialschulen* doubled: thanks to Maria Theresa and Joseph II schooling, ca. 200 new schools were opened, which summed to the already existing more than 200 ones. When Bonaparte arrived in the Duchy, 1/3 of the municipalities had already a municipal school free of charge for families. French policy carried on the same policy of compulsory schooling and of diffusion of schools in every parish. Teachers' salary was to be paid by local administrations. Thanks to the Napoleonic policy elementary schools doubled again, reaching the number of 800 ca in 1814². In 1814 the territory of Lombardy included not only the area of the old Duchy of Milan, but also areas of the ex-Republic of Venice: it had tripled, whereas population had doubled, when compared with Maria Theresa's age.

After 1814 Vienna carried on the same policy of compulsory schooling free of charge for pupils. The net of male *Trivialschulen* (first 2 years) was already solid, hence the government pushed more the opening of new male *Hauptschulen* (following 3 years). To the contrary, the government urged the

¹ S. Polenghi, *Die Österreichische Schulreform in der habsburgischen Lombardei*, «History of Education & Children's Literature», vol. 6, n. 1, 2011, pp. 77-91; Ead., *The latest Historiography on Austrian Schooling Reform in Habsburg Lombardy*, «Neveléstörténet – History of Education», n. 14, 2011, pp. 103-112; Ead., *La formazione dei maestri nella Lombardia austriaca*, in Ead (ed.), *La Scuola degli Asburgo. Pedagogia e formazione degli insegnanti tra il Danubio e il Po (1773-19918)*, Torino, SEI, 2012, pp. 45-89 (pp. 45-50 on historiography). This last essay deals with the topic of the present article in a more extensive way.

² X. Toscani, *Scuola e alfabetismo nello Stato di Milano da Carlo Borromeo alla Rivoluzione*, Brescia, La Scuola, 1993; Id., *La politica scolastica nel Regno lombardo-veneto: scuole elementari*, in L. Pazzaglia (ed.), *Chiesa e prospettive educative in Italia tra Restaurazione e Unificazione*, Brescia, La Scuola 1994, pp. 318-353.

opening of female *Trivialschulen*, which were particularly lacking, making little of female *Hauptschulen*. When comparing the data, one can easily see the difference in this male/female policy: being the female attendance to school still very backward, the government greatly improved the first step of schooling (*Trivialschulen*). The table n. 1 shows this process: in nearly 40 years, female *Trivialschulen* boosted of 1762, 7%, male *Trivialschulen* just grew of +31, 6%. On the contrary, male *Hauptschulen* raised of 336, 8%, whereas female *Hauptschulen* grew of just 36, 3%.

Table 1. '*Trivialschulen*' and '*Hauptschulen*' in Lombardy 1815-1855³

	Male <i>Trivial- schulen</i>	Increase %	Female <i>Trivial- schulen</i>	Increase %	Male <i>Haupt- schulen</i>	Increase %	Female <i>Haupt- schulen</i>	Increase %
1815	1.798		102					
1822	2.108	+17, 2%	492	+382, 3%	19		11	
1832	2.279	+26, 7%	1.185	+1061, 7%	57	+200%	14	+27, 2%
1842	2.314	+28, 7%	1.623	+1491, 1%				
1852	2.366	+31, 6%	1.900	+1762, 7%				
1855					83	+336, 8%	15	+36, 3%

Literacy spread in parallel: in more than 30 years male pupils of municipal elementary schools increased of 59, 5%, but female pupils reached a growth of 292, 5% (table n. 2).

Table 2. *Pupils of elementary municipal schools*⁴

	Boys	Increase %	Girls	Increase %
1822	81.241		26.524	
1841	113.444	+38, 6%	75.326	+184%
1855	129.510	+59, 4%	104.126	+292, 5%

³ Reworked data from X. Toscani, *La politica scolastica nel Regno lombardo-veneto: scuole elementari*, pp. 328-339. See also A. Sandonà, *Il Regno lombardo-veneto 1814-1859*, Milano, L.F. Cogliati, 1912, pp. 141-150; M. Meriggi, *Il Regno Lombardo-Veneto*, Torino, UTET, 1987, pp. 289-295.

⁴ Toscani, *La politica scolastica nel Regno lombardo-veneto: scuole elementari*, cit., pp. 331-336. In the district of Pavia, in 1791 only 2 schools existed, where the normal method was used. After Napoleonic time, in 1814, municipal schools were 60 and in 1843 they had stepped to 251, M.T. Cigolini, *L'istruzione elementare a Pavia dalle riforme teresiane al Risorgimento*, Milano, La Pietra, 1983, pp. 110-111.

In 1855 out of 100 pupils who were supposed to attend school, 68% of boys and 55% of girls did. If one includes also public schools (private ones)⁵ the percentages raise to 74% for boys and 69% for girls⁶.

In Venetia, in 1856 only 41% of pupils who were supposed to attend school actually did (they were just 24% in 1824). Attendance of girls was poor, compared with Lombardy, and female schools were scarce: in 1851 Venetia had 1481 male *Trivialschulen* and 39 male *Hauptschulen*, but only 81 female *Trivialschulen* and 9 *Hauptschulen*⁷, whereas Lombardy could boast 1900 and 15 respectively. In 1856 only 6% of the municipal teachers in Venetia were women⁸.

The diverse results of the Napoleonic and Austrian policy on various Italian areas depended from the different social, cultural and economic conditions. In this respect, as Toscani has clearly shown, the State of Milan first and Lombardy then were favourite in more respects⁹. In itself, the goodness of a school policy is not sufficient to determine a rapid improvement of literacy, if other structural conditions are not present. This is also true when one compares the results of Austrian school policy in the Kingdom of Lombardy and Venetia: as above remembered, progresses in the first region were by far deeper and wider than in the second. Lombardy landed estates were divided among great, medium and small land-holding – the latter especially diffused in the mountains and interested in literacy; landed gentry was open-minded and looked at European models of mechanizations and farming methods; aristocracy was generally well cultivated, not idle but keen with work and philanthropy; the clergy had long absorbed cardinal Carlo Borromeo's lesson of a pastoral care that attended to literacy and education, too. Economic and social structure as well as religious tradition concurred in shaping a society that cared for literacy and schooling.

The above mentioned figures put Lombardy forwards in comparison not only with other Italian regions, but also inside the territories of the Habsburgic Empire (table n. 3).

⁵ The term «public schools» is used in this article with the British meaning of private schools.

⁶ Toscani, *La politica scolastica nel Regno lombardo-veneto: scuole elementari*, cit., p. 336; K.J.A. Mittermayer, *Delle condizioni dell'Italia, versione dal tedesco dell'abate Mugna*, Vienna-Milano, Tendler e Schafer, 1845, p. 214.

⁷ M. Gecchele, *Maestri e formazione nelle province venete (1814-1866)*, in Polenghi (ed.), *La scuola degli Asburgo*, cit., p. 120.

⁸ *Ibid.*, p. 121.

⁹ Toscani, *Scuola e alfabetismo nello Stato di Milano da Carlo Borromeo alla Rivoluzione*, cit.; Id., *La politica scolastica nel Regno lombardo-veneto: scuole elementari*, cit.

Table 3. ‘*Trivialschulen*’ and ‘*Hauptschulen*’ in the other regions of the Habsburg Empire 1828-1847¹⁰

	Male <i>Trivialschulen</i>		Male <i>Hauptschulen</i>		Female schools	
	1828	1847	1828	1847	1828	1847
Austria and Salzburg	1646	1714	29	26	41	20
Styria	611	627	7	9	1	11
Krain and Carinthia	336	380	9	10	9	8
Küstenland	78	185	11	13	16	44
Tirol and Vorarlberg	1339	1421	12	15	156	349
Bohemia	3121	3465	43	50	37	46
Moravia and Silesia	1829	1888	25	27	22	25
Galicia and Bukowina	1616	2195	31	43	23	42
Dalmatia	16	182	7	7	4	35

If this quantitative growth is known and relevant, not less important is the qualitative amelioration of teacher training.

Teacher training from Joseph II to the Code of 1818: from the Normal method to Milde’s pedagogy

Elementary teacher training officially started in in the State of Milan in 1786, under Joseph II, when the first *Normalschule* was set up in Milan. Teachers had to learn the new didactics, the Normal method that Felbiger had introduced in Austria in 1774. In 1791 the method was purged of the most mnemonic part, the *Tabellen*, under the criticism put forward in Austria as well as in the State of Milan, with F. Soave observations¹¹. Candidate teachers had to attend a 3 months course in the Normal School of Milan, in order to obtain a certificate that allowed them to be appointed teacher by a local municipality. In spite of contemporary doubts on the efficacy of such a short time of learning, put forward by father Moritz, it appears that Joseph II pressure gave also in

¹⁰ A. Ficker, *Geschichte, Organisation und Statistik des österreichischen Unterrichtswesens*, Wien, A. Hölder, 1873, p. 34.

¹¹ M. Gecchele, *Fedeli sudditi e buoni cristiani. La “rivoluzione” scolastica di fine Settecento tra la Lombardia austriaca e la Serenissima*, Verona, Mazziana, 2000; S. Polenghi, *La pedagogia di Felbiger e il metodo normale*, «Annali di storia dell’educazione e delle istituzioni scolastiche», n. 8, 2001, pp. 245-268; Ead., *La pedagogia austriaca tra Sette e Ottocento*, «Pedagogia e vita», n. 3, 2002, pp. 65-84; Ead., *Scuole elementari e manuali per i maestri tra Sette e Ottocento. Dall’Austria alla Lombardia*, in E. Becchi, M. Ferrari (edd.), *Formare alle professioni. Sacerdoti, principi, educatori*, Milano, Franco Angeli, 2009, pp. 398-418.

Italian territories an immediate result: when examining the enquiries and the statistics prepared by Napoleonic administrations in 1797 and 1802 and those drawn up by Austrian administration in 1799-1800, one can see that they agree upon depicting a rather good situation. In fact, 13-15 years after the opening of the Normal school of Milan, already 1/3 of the teachers (both private and appointed by the town halls) in Milan region knew the Normal method. Joseph II had in fact stated that without the Normal School certificate no one could be appointed teacher. Another key result of his policy was that at the beginning of the new century 40% of the elementary teachers of this area (of both public and municipal schools) were lay and not priests¹².

Napoleonic school policy, as said, followed the footprint of the Austrian one, but the results were better in those areas, which had already experienced Austrian school policy. In 1814 the vast majority of teachers in Italy belonged to the clergy, whereas in Lombardy 50% of elementary teachers were lay, a percentage that reached in Milan district 66%, and 70% in Cremona district. Nearly all municipal teachers in the city of Milan in 1814 were lay – in Venetia, for instance, they were still all priests¹³.

The way the Napoleonic Kingdom of Italy chose to diffuse literacy was, thanks to the clever thrust of Giovanni Scopoli, Director of the school system from 1809, to control the municipal budgets thorough the prefects, rejecting the budgets which did not foresee the cost of a teacher's salary. As for spreading the normal method, instead of opening Normal schools, the Napoleonic government preferred other systems, more economical: the imposition of «normal» books (mainly stepping back to Soave and Joseph's time) and the obligation for all elementary teachers, public as well, to take an examination and get a state certificate. In this way, only little competence in three subjects was tested: reading, writing and a bit of arithmetic (generally sums and subtractions, sometimes only sums, rarely also multiplications and even more rarely divisions too). The three «r» were the minimum knowledge a teacher was supposed to have, especially a rural teacher. The possess of the decimal metric system was the novelty: the government was very strict about this. On the other hand, no competence in education or didactics was tested, which was a draw back in comparison with the Josephinistic Normal School, where the short version of Felbiger's *Methodenbuch* was used. The Italic Kingdom was urged by the necessity of appointing many teachers, so it could not expect to

¹² S. Polenghi, *Maestri e istruzione di base nel Milanese negli anni della Repubblica Cisalpina (1797-1802)*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 2, 1994, pp. 103-148.

¹³ S. Polenghi, *La rete delle scuole elementari nei dipartimenti napoleonici delle aree lombardo-venete*, in A. Bianchi (ed.), *L'istruzione in Italia tra Sette e Ottocento. Lombardia, Veneto, Umbria. Studi*, Brescia, La Scuola, 2007, Vol. I, pp. 179-192; Ead., *L'istruzione primaria e i maestri 1800-1814*, in E. Brambilla, C. Capra, A. Scotti (edd.), *Istituzioni e cultura. Vita intellettuale, arte e scienza in età Napoleonica*, Milano, Franco Angeli, 2008, pp. 475-500.

provide all that many with pedagogical knowledge or indeed even deep possess of basic qualification, which one was supposed to get gradually by teaching, out of his own experience¹⁴. Somehow the Italian Kingdom would have to face the same problem, 50 years later, immediately after the unification: pressed by the need of defeating illiteracy, it chose to appoint many teachers of poor quality, rather than few, but well prepared.

The strategy of the Napoleonic Italic Kingdom worked well in areas that had already experienced Austrian dominion, such as Tyrol or Milanese areas, where in 1799, as said, 1/3 of the teachers mastered the normal method, in 1805 already the double (61%) and in 1814 nearly the whole did¹⁵.

The 1818 School Code introduced in the Kingdom of Lombardy and Venetia the *Politische Schulverfassung*, the School Act approved in Vienna in 1805 and enforced in 1806 in the Austrian Empire. The *Schulverfassung* retained the stamp of Maria Theresa and Joseph II's policy, particularly in the architecture of the school system, but stopped the secularization wanted by Joseph, prescribing that school directors and inspectors had to be priests. For this reason, Austrian school policy has been accused of being denominational. However, if it is true that elementary school framework was surely anchored to the Church, one has to take into account that Francis II's Vienna still retained Josephinistic thrusts, particularly in administration offices. The throne-altar alliance was intended in the tracks of jurisdictionalism: all priests involved with school were controlled directly by the State. Indeed that is way bishops of Lombardy and Venetia refused to accept the schools' direction and inspection¹⁶.

The *Politische Schulverfassung* confirmed the *Normalschulen* for teacher training, spreading them in the districts. That meant that not only the *Normalhauptschule* of Milan would open again, but also that every district had to have one *Normalhauptschule*¹⁷. That in itself was an improvement, because it made it easier for candidate teachers to attend a Normal school and because it reintroduced the teaching of pedagogy. The *Imperial Royal Normalhauptschule*

¹⁴ M. Roggero, *L'alfabeto conquistato: apprendere e insegnare nell'Italia tra Sette e Ottocento*, Bologna, il Mulino, 1999.

¹⁵ Polenghi, *La rete delle scuole elementari nei dipartimenti napoleonici delle aree lombardo-venete*, cit.; Ead., *L'istruzione primaria e i maestri 1800-1814*, cit.

¹⁶ Toscani, *La politica scolastica nel Regno lombardo-veneto: scuole elementari*, cit., pp. 334-335.

¹⁷ See the fundamental works of H. Engelbrecht, *Geschichte des österreichischen Bildungswesen, Erziehung und Unterricht auf dem Boden Österreichs*, 3 vols., Wien, Österreichischer Bundesverlag, 1982-1988; R. Gönner, *Die österreichische Lehrerbildung von der Normalsschule bis zur Pädagogische Akademie*, Wien, Österreichischer Bundesverlag für Unterricht, Wissenschaft und Kunst, 1967; W. Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an der Universitäten vom 18. bis zum Ende des 20. Jahrhunderts*, Wien, Verlag der Österreichischen Akademie der Wissenschaften, 2000, Vol. I, pp. 1-249. In Italian see Polenghi, *La pedagogia austriaca tra Sette e Ottocento*, cit.

of Milan (*Imperial Regia Scuola Caponormale*) opened in 1820, but the course for candidate teachers started in 1822, when the translations of the school books were ready (approved by Vienna and printed).

Teachers of *Hauptschule* (*Scuola elementare maggiore*) had to attend a six months course, for teachers of *Trivialschule* (*Scuola elementare minore*) a three months course was enough. Both had to pass a final exam, though, after a training of one year. Since rural schools just had the first two years (*Trivialschule*), the gap between country and city teachers was great – as indeed would be for rather a long time also in united Italy. The examination tests were different. Those for rural teachers were much easier and referred to countryside life. For example, the title of the essay submitted in 1854 to candidate rural teachers in the *Scuola Normale* of Milan was: «What are horse and ox used for». The essay had to be written in only seven lines¹⁸.

It is to be underlined that the 1818 Code encouraged the attendance of candidate teachers to *Normalschulen*, having spread them, but also improved greatly teacher training, providing a coaching both in theory and in practice. A part from the year training in school, important in itself, the contents of teachers' preparation were ameliorated, in comparison with Joseph II government and with Napoleonic time. The usage of sources so far not yet fully researched into, such as the pedagogical text-books for teachers and the documents of candidate teachers examinations allow to affirm it¹⁹.

All *Normalschulen* of the Habsburg Empire had to stick to the *Methodenbuch* written by Joseph Peitl (1820), director of the *Normalschule* of Vienna²⁰ and approved by the *Studienhofkommission*, which definitively replaced Felbiger's one (1774) as well as his smaller *Kern des Methodenbuches* (1775). A comparison between Felbiger and Peitl's books points out, even if in continuity line, the progresses in psycho-pedagogical approach and in teaching, due to the reception of Vincenz Milde's pedagogy²¹. Milde's *Lehrbuch der allgemeine Erziehungskunde zum Gebrauch der öffentlichen Vorlesungen* (1811-13) was translated into Italian in 1827 and was the compulsory book for chairs of

¹⁸ Archivio storico civico, Milan, *Istruzione*, (ACM, Istruz.), 159.

¹⁹ More extensively in Polenghi, *La formazione dei maestri nella Lombardia austriaca*, cit.

²⁰ R. Seebauer, *Lehrerbildung in Porträts. Von der Normalschule bis zur Gegenwart*, Wien, LIT Verlag, 2011, pp. 61-66.

²¹ On this comparison see Polenghi, *Scuole elementari e manuali per i maestri tra Sette e Ottocento. Dall'Austria alla Lombardia*, cit. About Milde, first professor of Education (*Erziehungskunde*) in the university of Vienna (1806-1810), archbishop of Vienna (1832-1853) see: H. Holstiege, *Die Pädagogik Vincenz Eduard Mildes 1777-1853*, Wien, Wiener Domverlag, 1971; Engelbrecht, *Geschichte des österreichischen Bildungswesen*, cit., pp. 215-217; Brezinka, *Pädagogik in Österreich*, cit., pp. 233-248; I.M. Breinbauer, G. Grimm, M. Jäggle (edd.), *Milde revisited. Vincenz Eduard Mildes pädagogisches Wirken aus der Sicht der modernen Erziehungswissenschaft*, Wien, Lit, 2006; Seebauer, *Lehrerbildung in Porträts*, cit., pp. 67-72. In Italian, Polenghi, *La pedagogia austriaca tra Sette e Ottocento*, cit.

pedagogy, In the University of Pavia it was already used in 1820²². Milde's educational theory was the most original and the deepest one of the time in Austria. He mastered a wide European pedagogical, psychological and medical literature. His theory was much more heir of the late Josephinismus than son of a conservative Catholicism: Milde knew and was influenced by Komensky, Rousseau, the German Philanthopists and partially by Pestalozzi.

Peitl was a follower of Milde. His *Methodenbuch* was translated into Italian by Francesco Cherubini, director of the *Normalschule* of Milan, a great philologist and dialect expert. The first edition's title was *Insegnamenti di metodica*, but later the first words were dropped, so that it become *Metodica*, more in adherence with the original title. Compulsory used by all the directors of *Normalschulen* of the Kingdom in their lessons to candidate teachers, it had various editions up to Italian unification²³. The *Metodica* was a thick volume of 282 pages, to be learned by town teachers of *Hauptschulen*. Peitl had also written the *Forderungen an Lehrer*, for rural teachers. In 1821 Cherubini translated this work, too, which consisted of only 74 pages, with very little space to few (but effective) pedagogical suggestions²⁴.

This introduction of Milde's pedagogy in the Kingdom of Lombardy and Venetia through Peitl's mediation was very important. Cherubini's translations were superb. His mastering of Italian language granted an excellent rendering of the German into Italian and a particularly good writing (which he himself provided) of the part of the *Metodica* dedicated to Italian grammar and language. The pedagogical content of Peitl/Cherubini books granted the educating of two generations of good teachers and was particularly significant for town and city teachers. The pedagogical deepness, the attention to the needs and aptitudes of every single pupil, the care for teaching ability and for the psychological capability of teachers that were in Peitl's pages provided teachers with a good learning, which put them forward in the Italian peninsula. The Kingdom of Sardinia, politically antagonist of the Habsburg Empire, could not openly accept an Austrian educational model, nonetheless that model was gradually known

²² V. Chierichetti, *Le nomine dei docenti di pedagogia nell'Ateneo pavese (1817-1859)*, in Polenghi (ed.), *La scuola degli Asburgo*, cit., pp. 91-112.

²³ *Insegnamenti di metodica ovvero precetti intorno al modo di ben insegnare proposti ai maestri delle scuole elementari maggiori e minori. Opera di Giuseppe Peitl tradotta dal tedesco e accomodata per uso delle scuole italiane da Francesco Cherubini*, Milano, Imperial Regia Stamperia, 1821.

²⁴ *Manuale dei maestri elementari o sia compendio dei metodi d'insegnamento e d'educazione prescritti per le scuole elementari nel Regno Lombardo-Veneto*, Milano, Imperial Regia Stamperia, 1821. On these translations of Cherubini see: S. Polenghi, *La formazione dei maestri nel Lombardo-Veneto: le traduzioni di F. Cherubini dei testi di J. Peitl (1820-21)*, in *Le carte e gli uomini. Storia della cultura e delle istituzioni -Secoli XVIII-XIX. Studi in onore di Nicola Raponi*, Milano, Vita e Pensiero, 2004, pp. 153-173. On the content of the books and the comparison with Felbiger's ones see Polenghi, *Scuole elementari e manuali per i maestri tra Sette e Ottocento. Dall'Austria alla Lombardia*, cit.

and recognized as good, particularly in the Forties. After Ferrante Aporti's²⁵ lessons about education in the University of Turin in 1844, Austrian pedagogy and teaching was openly presented, discussed and used²⁶. In 1845 the Piedmont magazine «Educatore primario» reviewed positively Milde's book²⁷.

The Normal School of Milan and the its director's action

The Normal School, which was located in the very center of Milan, in Mercanti Square, by the Cathedral, opened on December 1st 1820. On January 17th 1822 its director Francesco Cherubini started the first course of method (pedagogy and didactics), with weekly lessons. In 1820 he had been appointed temporary director by the Inspector of elementary schools Palamede Carpani, who had already given him Peit's books to translate. Carpani, a well cultivated priest, had rightly a high esteem of Cherubini²⁸. In 1832 he exempted Cherubini from the foreseen competition, praising his intellectuals and educational merits, well above average. Cherubini was therefore appointed stable director with an exceptional proceeding²⁹. He retained his appointment up to 1848, when he retired, out of illness, do die lonely three years later.

Cherubini directed the School with competence and was appreciated for his wisdom, his affability towards pupils and his judgment capacity when dealing with candidate teachers. Nowadays he is remembered for his edition of Carlo Porta's poems and as the author of the still used *Dictionary Milanese dialect-Italian*, but he was a very good educationalist as well as a fine linguist. When he retired, replacing him was clearly an arduous task. The solution taken (a makeshift) was to appoint as temporary directors two priests, fairly esteemed, but not so competent to stand in a state competition, which in fact was not called. From 1848 to 1854 the school catechist, Giuseppe Spreafico, was

²⁵ C. Sideri, *Ferrante Aporti: sacerdote, italiano, educatore*, Milano, Franco Angeli, 1999.

²⁶ P. Bianchini, *La ricezione della pedagogia austro-lombarda nel Piemonte sabaudo*, in Polenghi (ed.) *La scuola degli Asburgo*, cit., pp. 162-178 especially; on the influence of Cherubini on Sardinian priests, see F. Pruneri, *L'istruzione in Sardegna 1720-1848*, Bologna, il Mulino, 2011, pp. 188-189, 234, 262, 286, 288-291.

²⁷ V. Garelli, «L'Educatore primario», n. 29, 1845, pp. 473-479. Quoted by P. Bianchini, *Tra utopia e riforma della scuola: la metodica e il libro per l'istruzione elementare nell'Italia della Restaurazione*, in G. Chiosso (ed.), *TESEO, Repertorio degli editori per la scuola nell'Italia dell'Ottocento*, Milano, Editrice Bibliografica, 2003, p. xxxix.

²⁸ C. von Wurzbach, *Biographisches Lexikon des Kaiserthums Oesterreich*, Wien, Zamarski, 1859-1891, Vol. II, p. 290; *Dizionario Biografico degli Italiani*, entry by F. Vittori, Roma, Istituto della Enciclopedia italiana, 1977, Vol. XX, pp. 581-582.

²⁹ On this point see Polenghi, *La formazione dei maestri nel Lombardo-Veneto: le traduzioni di F. Cherubini dei testi di J. Peitl (1820-21)*, cit. On his life see: C. von Wurzbach, *Biographisches Lexikon des Kaiserthums Oesterreich*, Vol. II, pp. 337-338; *Dizionario Biografico degli italiani*, entry by F. Vittori, cit., 1980, Vol. XXIV, pp. 430-432.

acting director and therefore taught pedagogy. After his death, a priest from Como, Cesare Vigliezzi, was appointed temporary director, until 1859, when Lombardy was united to Piedmont. It was not an easy task to find somebody as competent as Cherubini, who was an intellectual with a widespread net of cultural relationships, and author of various literary works.

No documents on Cherubini's lessons of pedagogy are left. He had to stick to Peitl's book, but we can see that he actually agreed with Peitl's educational theory, stemming from Milde, when we examine the reports of his monthly meetings with the teachers of the Normal School. On July 5th 1821 he recommended that during the break hour teachers did not leave school, but stopped with pupils, going around among them, for that hour of free time was the most important one to really understand the boys³⁰. That was in agreement with what Peitl had written³¹. On March 3rd 1822 Cherubini exhorted the teachers not to leave pupils in punishment after school time. Moreover, every Monday pupils sitting in the desks of honour and of blame had to change: in no case a boy had to sit in the desk of blame longer than week, even better if only for few hours or days³².

Rewards and punishments still followed the educational theory of Karl Heinrich Seibt, first professor of *Erziehungskunde* in the University of Prague³³, a theory that appeal to pupils' sentiments of honour and emulation. Cherubini, though, preferred praises rather than castigations, pride rather than shame: it was a mistake to insist in stimulating a sense of shame. Too much humiliation could be counter effective. Therefore, on July 5th 1821 he had stated that no more than one pupil should be allowed to go out in the corridor to see the mate sitting in the desk of blame, and that exposition should last very briefly³⁴, just the time to make the feelings of shame and repent emerge, without soliciting other pupils' scorn and mockery. He clearly preferred mildness to rigid discipline. On March 12th 1846, two years before retiring he asked the teachers not to instill fear of him in the pupils' hearts. Boys had to face a «fatherly correction of the director»³⁵. Also in his late years he always treated boys with kindness and with a severity which was dampened by affection. In other words, he applied Peitl's

³⁰ ACM, *Istruz.*, 170, *Registro delle sedute mensuali della I.R. Scuola Normale di Milano: 1821-1849.*

³¹ Quote from the 4th edition, *Metodica ovvero precetti intorno al modo di ben insegnare le materie proprie delle scuole elementari maggiori e minori. Opera di Giuseppe Petil tradotta dal tedesco a raccomandata per uso delle scuole italiane da Francesco Cherubini*, Milano, Imperiale Regia Stamperia, 1835, pp. 219-220.

³² ACM, *Istruz.*, 170, *Registro delle sedute mensuali della I.R. Scuola Normale di Milano: 1821-1849.*

³³ On Seibt see Brezinka, *Pädagogik in Österreich*, cit., vol. 2, 2003, pp. 5-9 and G. Grimm, *Von der Bildungsphilosophie zur „Erziehungskunst“*. *Karl Heinrich Seibt und die Anfänge der Pädagogik als akademischer Disziplin in der Habsburgermonarchie*, Klagenfurt, Abt. für Histor. u. Vergleichende Pädagogik, Univ. Klagenfurt, 1998.

³⁴ ACM, *Istruz.*, 170, *Registro delle sedute mensuali della I.R. Scuola Normale di Milano: 1821-1849.*

³⁵ *Ibid.*

prescriptions because he really believed in them. Memories of his childhood and his sad experiences in Barnabite's school surely influenced his attitude in this respect. Proud and lively, he had been often punished and battered. When adult, he criticized heavily beating and whipping, stupid and humiliating punishments, merely mnemonic study, excessive spirit of competition³⁶.

On November 23th 1837, faced with the case of an entire class of pupils (4° form) which displayed negative marks in scientific subjects, instead of confirming the marks, he held the teacher guilty. So he gave the boys two months to put up with the program. He and Inspector Carpani «strongly recommended not to teach much, but little and deeply» particularly in arithmetic³⁷. Against encyclopedism he insisted on the solidity of a rationally assimilated knowledge, rather than a superficial vastity, trusted to memory. That, too, was in accordance with Milde, as well as with his own experience.

Examinations of candidate teachers in Milan

According to the few existing archival sources from 1823 to 1847 the course for candidate teachers in the Normal School of Milan was attended by 175 men, many of whom did not manage to come to the end of it and/or did not take the examination: a fact that confirms the increased difficulties of the tests. Cherubini's notes on the candidates show his attention to their learning capabilities, character and possible body impairments which would hinder teaching (such as a defective sight or a feeble voice)³⁸.

The number of candidates, in spite of the abandonments, was too high to be absorbed by the job market, so that on October 8th 1828 the government prescribed more strictness: «examinations must be rigorous, in order to discourage the excessive trend towards teaching profession»³⁹. Indeed, in spite of the year of training, the wideness of the exam program, the tightening up

³⁶ G.B. Capitani, *Della vita e degli scritti di Francesco Cherubini*, Milano, Pirota, 1852, pp. 10-22.

³⁷ ACM, *Istruz.*, 170, *Registro delle sedute mensuali della I.R. Scuola Normale di Milano: 1821-1849*.

³⁸ ACM, *Istruz.*, 170, *Elenco delle persone frequentanti l'I.R. Scuola Normale come aspiranti al grado di maestro 1822-47*. There are Cherubini's notes, such as: «diligent, capable, attentive; I cannot say anything precisely; very diligent and keen; should be good with boys; should be good with small boys; looks absent-minded but has sufficient capacities; lot of skills, should be good; should correct a certain harshness towards boys; attentive, zealous, capable; diligent, capable, sight and voice defective; very diligent; very good». Peitl had insisted on the importance of having a melodious voice, a pleasant and lively tone, not a boring one.

³⁹ ACM, *Istruz.*, 169.

of the selection, the job of elementary school teacher was sought-after, for it granted a certain economic security and the pension. It is worth noting that not few teachers were teachers' sons.

The sources are missing or are partially preserved for the decade 1848-59, but we know that from 1856 to 1859 in Milan at least 32-36 candidate teachers were examined every year and in 1854 at least 60: the job of elementary school teacher – for it had become a proper job in towns and cities – was more and more sought-after⁴⁰. These data ought to be compared with data from the other Normal Schools of the Kingdom of Lombardy and Venice – it is to be expected that the figures were higher in the capital, but we can foresee a similar trend, at least for Lombardy.

The files of the examinations preserved in the State Archives and in the Civic Historic Archives of Milan allow a comparison, which shows the transformation of the tests, their becoming deeper, more analytic and selective and clearly set out, in order to check both the subjects and the pedagogical-didactic knowledge. In Joseph II's years and in Napoleonic age examinations tested only the possession of a basic knowledge about the three «r» (and often not even all the three), not the real ability in teaching them. Often candidates who could not spell or write correctly or who could not multiply or divide were approved, so strong was the pressure to find teachers, as above said. During the Restoration things changed. From 1816 to 1822 the candidates were tested on 8 subject. From 1823 all candidate teachers, also those of *Trivialschulen*, had to sit in an examination where they were tested on 10 subjects⁴¹, receiving a double mark for each: one on the content and one on the teaching of the subject. Plus there was another exam on pedagogical theory and general didactic. All in all, 21 marks. True enough, as said, the tests were differently set for candidates for *Trivialschulen* or *Hauptschulen*, but the exam was much more difficult than before. Rejection in just one subject meant failure. One had then to wait for 6 months, before being allowed to take the exam again. Also the compulsory year of training must not be forgotten: this rule excluded those who had no practical experiences.

So whereas before quite often men without a real competence applied and not rarely were approved, that become impossible. The implementation of the Austrian school law determined a clear step forward in teachers' professionalization. The final examination gave a teaching qualification, which was necessary to get a job in municipal schools.

The questions about pedagogy and didactics asked to candidate teachers had obviously to refer to the principles of Peitl-Cherubini's books, but it is interesting to check which of all these were the most asked. The sources here

⁴⁰ ACM, *Istruz.*, 160.

⁴¹ Spelling, reading, writing and calligraphy, mental arithmetic, written decimal arithmetic, orthography, dictation, grammar, rules of composition writing, religion.

again are unfortunately scarce and discontinuous. Only some files of years 1847-59 are kept and can be used⁴². All three directors of the Normal School of Milan (in 1847 Cherubini was still there) focused on certain points. The figure of the teacher and his character appeared in 1847 («The teacher as a life-model for pupils»), in 1857 («How shall a teacher be esteemed by his pupils, how shall he deserve their affection and stimulate them to study?»), in 1859 («How to reconcile severity and mildness and love, father's affection and teacher's authority»). These questions were diffusely examined in the *Metodica*, but also the small *Manuale dei maestri elementari* dedicated space to teacher's qualities.

In 1847 and in 1859, moreover, it was asked which prizes and punishments had to be used – we have already pointed out that Cherubini was concerned by the question, which was widely faced by Peitl, Milde and by the educational theories in Europe in the Enlightenment and in the XIX century, from Locke, Rousseau, the Philantropists and Campe especially, Seibt and so on. In 1859 we also find a question of general didactics: «Explain what order, variety and clearness of teaching are». In 1857 the query dealt with the teaching of mathematics and the progression of it. In 1859 a relevant didactic point was raised: «How to make a subject in itself boring a pleasant one». The question concerned mathematics again: a difficult subject for candidate teachers as well as for pupils. Peitl recommended not to teach nude rules, to memorize passively, but to insert arithmetic in pupils' everyday life and experience, and provided many examples and useful suggestions.

Having said so far that the new model of examination and training was by far deeper and more difficult than in the past, we nonetheless have to stress that the selection was sometimes even in the Normal School of Milan mitigated by the necessity of appointing rural teachers. Candidates, in fact, came not only from the city, but also from towns and villages of the district. In 1840, for instance, Inspector Carpani wrote to Cherubini, presenting him two country teachers, who had been teaching since 20 years for a little salary and pleaded him to be merciful: «Dear Cherubini, let them somehow pass, for how can we find teachers for such a misery of 100 lire?». Similarly, he begged Cherubini to admit again to attending the course a candidate, who had failed in the subject pedagogy⁴³. An old and esteemed teacher, Luigi Porticelli, in 1821 and 1822 recommended some candidates to rural schools, both priests and lay, who knew more than required, but also one «out of sheer compassion»⁴⁴. Many rural teachers had in fact to keep another job, since their salary was too small for a living, in Lombardy as elsewhere⁴⁵.

⁴² ACM, *Istruz.*, 159, 160.

⁴³ Biblioteca Nazionale Braidense, Milan (BNB), *Carte Cherubini*, AH. XIII. 1/19, P. Carpani to F. Cherubini, Dec. 21st 1840.

⁴⁴ BNB, *Carte Cherubini*, AC, XI. 24/23.

⁴⁵ M.T. Cigolini, *L'istruzione elementare a Pavia dalle riforme teresiane al Risorgimento*, Milano, La Pietra, 1983, p. 118. A very good reconstruction is provided by C. Pancera, *Maestri e*

The municipality of Milan appointment criteria: slowness of a career

Having obtained a certificate of teaching qualification after the attendance of the course, the year of training and the final examination was an obligatory step, but not the last one to get a job. One had in fact to be appointed by the town council. In little towns and villages, that meant having the benevolence of the major, but in big towns a proper competition took place. If we check which criteria the municipality of Milan applied when choosing its teachers, we find that since Joseph II's age one fundamental rule was the one of the years of service in municipal schools. By that way, in few decades the town council established an employment procedure, which encouraged teaching in municipal schools. Actually, applicant teachers started as simple gratuitous aids, then as supply teachers. Meanwhile, they improved their didactics capabilities and the school directors could know them personally and evaluate their work. This system, used by the very beginning of the opening of the Normal School, was carried on in Napoleonic time.

Francesco Soave, who during the 13 months of the Austro-Russian occupation was director of the elementary schools, wrote in 1800 that: «having to appoint municipal teachers, the custom in the past has always been this one: in case of a teacher of 1st form, to promote a supply teacher, in case of a teacher of 2nd form, to promote a teacher of 1st class. The reason for this procedure is that we stimulate a useful emulation and we make sure we employ people already tested»⁴⁶.

The career progression was therefore controlled by school directors. With this system, younger men were always just gratuitous aids, then supply teachers, then 1st form assistant, then teacher, and lastly 2nd form assistant teacher and teacher. In 1818, for instance, 4 teachers of 2nd form retired. Immediately, 4 teachers of 1st form were advanced and a competition was opened for 4 places of 1st form⁴⁷.

Many applied to competitions, but just those who were already teaching in municipal schools had a good chance of winning. This system granted to Milan very competent teachers, stopping at the beginning the career of the less able ones. The drawback for that was that applicant teachers had to wait a long time: they had to put up with years of free work, before being steadily appointed. In 1846, for instance, a competition for 14 places of assistant teacher for 1st and 2nd forms was opened. Out of 35 applicants, 14 were already working in the municipal schools as supply teachers –in fact all the supply teachers of Milan applied. Their average age was of 28, 5 years and their service went from a

Istruzione popolare in Lombardia nel periodo preunitario, «I problemi della pedagogia», n. 4/6, 2000, pp. 299-337.

⁴⁶ Letter of Sept. 13th 1800, in F. Soave, *Epistolario*, ed. by S. Barelli, Locarno, Ed. dello Stato del Canton Ticino, n. 236, 2006, p. 334.

⁴⁷ ACM, *Istruz.*, 12.

minimum of 6 months to a maximum of 7, 5 years. Out of these 14, 12 won the competition. The other two were a gratuitous aid, already working in a municipal school, and finally a private teacher, the only one with no experience in a municipal school, but in a public one⁴⁸.

When in 1854 a competition was opened, for a place of 2nd form teacher, 10 candidates applied, 8 of whom assistant teachers in municipal schools and two private teacher. The average age of the assistant teachers was of 40 years, an evidence of the slowness of the career⁴⁹.

Previous experience in municipal schools was a fundamental requirement, but it was not the only one. The Municipality also took into account family situation, according preference to men with a family, since Joseph II's years.

Female teachers: a new job

A great novelty brought by Austrian school law was woman training. After Napoleon's fall, female teachers in municipal schools were still very few and it was not easy to find women who possessed the required abilities, particularly in the country. But the government effort in favour of female literacy, with the above mentioned multiplication of female *Trivialschulen*, went by with the necessity of training women teachers. Indeed the Austrian code eventually established a training path also for women. They were exempted from the attendance to the course at the Normal School, but they had to study the prescribed Peitl-Cherubini's books and had to take their examination in front of the Inspector in chief (who was by law a priest, to prevent every possible peril of moral corruption). The tests were as strict as those for men. After the qualification, women too had to stand in a municipal competition or be appointed by majors, in small towns. So after 1823 for the very first time there was in Italy a specific education for female teachers, in conformity with men.

The exam of the archival sources (*videlicet* the competition acts so far preserved and the judgments of the directors of the schools where the female candidates taught, produced when they applied to a competition) shows a very good picture, which is confirmed by the judgments on women teachers given by their directors in 1834-35. In that year, the school directors of Milan and outskirts described as «very good» 55% of them, «good» 50% and only 5% as «not sufficient». Out of 113 female teachers, only 4 obtained the low score (2 were assistant teachers)⁵⁰.

⁴⁸ ACM, *Istruz.*, 18.

⁴⁹ *Ibid.*

⁵⁰ Archivio di Stato, Milan (ASM), Studi, p. m., 880, *Prospetto sommario dello stato delle scuole elementari nella Delegazione di Milano per l'anno 1834-35.*

In 1827 Inspector Carpani had already stated that whereas in the past men had to be employed in female school, because of the scarcity of competent women, the situation had rapidly changed, with the enforcement of the Austrian law: «finding good female teachers nowadays is not difficult, since many gratuitous aids have so far acquired such knowledge, that they can stand comparison with the most experienced male teachers. I do not harm the truth, when I say that in my personal visits of elementary schools of first and second grade [*scuole elementari maggiori e minori*] I find that female schools with women teachers can generally be an example to male ones as for good discipline and true progress»⁵¹.

Superior approval for teachers depended from moral, religious, political behavior and from teaching competence. That was valid for both men and women, but for the second ones morality was the always highlighted and indispensable quality. Women teachers had to be an example of ethical life and a guide for their pupils, thanks to patience, tenderness, good-manners and morality. They were animated by the «sweet maternal feeling» and had the natural duty of transmitting to girls the sense of obedience and of family love⁵² (one may however observe that the majority of them were actually spinsters, quite the opposite to male teachers).

In comparison with men, women were given abundant chances of getting a steady appointment, as a consequence of the above mentioned opening of many female *Trivialschulen* in the Restoration age. However, the perspective of this new job attracted so many young women, that Lombardy soon had a surplus of qualified teachers. This favoured the employment in municipal schools of the very best ones, but the competition for merit was so very strong that many years were necessary to get a steady place. For instance one woman who in January 1828 had passed the examination in front of Inspector Carpani with

⁵¹ ASM, *Studi*, p. m., 883, Milan Apr. 23rd 1827, Carpani to the government.

⁵² On female education and female teachers in Italy see at least S. Soldani (ed.), *L'educazione delle donne: scuole e modelli di vita femminile nell'Italia dell'Ottocento*, Milano, Franco Angeli, 1989; C. Covato, *Sapere e pregiudizio: l'educazione delle donne fra '700 e '800*, Roma, Archivio Guido Izzi, 1991; Ead., A.M. Sorge (edd.) *L'istruzione normale dalla legge Casati all'età giolittiana*, Archivio centrale dello stato, Roma, Ministero per i beni culturali, Ufficio centrale per i beni archivistici, 1994; C. Covato, *Un'identità divisa: diventare maestra in Italia fra Otto e Novecento*, Roma, Archivio Guido Izzi, 1996; S. Ulivieri, *Essere donne insegnanti: storia, professionalità e cultura di genere*, Torino, Rosenberg & Sellier, 1996; Ead. (ed.), *Le bambine nella storia dell'educazione*, Roma-Bari, Laterza, 1999; C. Covato, S. Ulivieri (edd.), *Itinerari nella storia dell'infanzia: bambine e bambini, modelli pedagogici e stilieducativi*, Milano, Unicopli, 2001; C. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento: il contributo di Maria Magnocavallo (1869-1956)*, Brescia, La Scuola, 2005; A. Cagnolati, T. Pironi, *Cambiare gli occhi al mondo intero: donne nuove ed educazione nelle pagine de L'alleanza (1906-1911)*, Milano, Unicopli, 2006; C. Ghizzoni, S. Polenghi (edd.), *L'altra metà della scuola. Educazione e lavoro delle donne tra Otto e Novecento*, Torino, SEI, 2008; A. Ascenzi, *Il Plutarco delle donne: repertorio della pubblicistica educativa e scolastica e della letteratura amena destinata al mondo femminile nell'Italia dell'Ottocento*, Macerata, eum, 2009.

19 «very good» and 2 «good» marks, who was single and lived with the old and ill father, who had been praised by her directors, in 1846, after 16 years of work in municipal schools of Milan as supply teacher, was still waiting for a better place⁵³. Similarly, another one, assistant since 1822, in 1843, at age 45, after 22 years of service was still pleading for a place of teacher in 1st class⁵⁴.

The average age of women teacher steadily appointed in *Trivialschulen* Milan in 1833 was of 32 years. As for *Hauptschulen*, as a matter of fact women were not appointed in Milan before being 30 years old⁵⁵. So, in spite of the growing number of new schools opened, the abundance of women with a teaching qualification soon saturated the market of municipal schools, the most desired. Social situation was ready in Milan for such a new possibility of job for young women of low class –but also girls of impoverished noble family or widows with children or orphans who had to support younger brothers and sisters found the new job appealing⁵⁶.

The many who did not manage to enter in a municipal school looked for a job in public schools and some even left Lombardy to get a job. Indeed the fame of women teachers from Lombardy spread in Italy and they were requested in other States, where no specific training course existed yet, when new female elementary schools were set up⁵⁷, or indeed women from nearby States came to Lombardy to acquire the qualification. When Lombardy was annexed to the Kingdom of Sardinia, after the war of 1859, the municipality of Milan opened a competition for elementary school teachers, on September 15th 1860. Then also women from Piedmont applied, who had come previously to Milan, to get the qualification, but who then could not be employed in Lombardy, being subject of a foreign State⁵⁸.

⁵³ ACM, *Istruz.*, 13.

⁵⁴ ACM, *Atti del Consiglio Comunale di Milano (1802-1860)*, Jan. 18th 1822, Jun. 8th 1827, Mar. 12th 1834, Feb. 23rd 1835, May 31st 1844, Jun. 8th 1847.

⁵⁵ ACM, *Istruz.*, 9.

⁵⁶ For instance see the case of Emilia Gervasoni, of noble family, with old parents, who in 1843 pleaded to be accepted as teacher even if under age of two years. Her curriculum was brilliant, but that would not be enough. Her demand was accepted because the state of poverty of her family was considered injurious for the honour of nobles. ACM, *Istruz.*, 13.

⁵⁷ See the requests in Piedmont and, after unification, in Molise: M.C. Morandini, *L'istruzione popolare femminile alla vigilia dell'unità: il caso di Torino*, in Ghizzoni, Polenghi (edd.), *L'altra metà della scuola. Educazione e lavoro delle donne tra Otto e Novecento*, cit., p. 116; A. Barausse, V. Miceli, *Le origini e i primi sviluppi dell'istruzione normale femminile in Molise (1861-1898)*, *ibid.*, p. 144.

⁵⁸ Files of these cases in ACM, *Istruz.*, 13.

Conclusions

As pointed out, when evaluating the effect of Austrian elementary school policy we must not forget that the only impulse coming from the government and the implementation of the 1818 Code in itself – no matter how good they were – would not have produced such relevant effects, if they had not found a fertile ground, ready to accept the reforms. Indeed the reception of the Austrian law was different in Lombardy and in Venetia: rapid and effective in the first case, slower and with more difficulties in the second. Milan and its area had experienced the Austrian school reforms in the age of Maria Theresa and Joseph II, Lombardy and then Venetia had lived the Napoleonic schooling, but most important Lombardy in the XIX century was an area with an already entrepreneurial agriculture; with a gentry and a *bourgeoisie* aware of industrial progress and sensitive to European literary, philosophical, economic and scientific culture; with a middle class of small landowners, artisans, shopkeepers and clerks who gave importance to literacy and education; with a clergy still faithful to St. Carlo Borromeo's lesson and therefore committed to pastoral care and to school and education⁵⁹.

On this fertile ground Austrian pedagogy and school laws about teacher training put Lombardy, in few decades, in the lead of literacy progress, together with Piedmont in the Cavour age. Before unification, the Kingdom of Lombardy and Venetia realized the professionalization of elementary teachers, thanks to a rigorous path of study and training, and with the right to the pension. The level of competence and of self-esteem was raised by the pedagogy that came from Vienna, which insisted on the virtues of teachers as specific for their job. The work of Cherubini surely contributed to elevating the cultural level of the new teachers in Milan and its district. The municipality of Milan set the steps of the career: slow and gradual but very attentive to merit. Priests early disappeared from Milan elementary schools and women entered the scene, quick conquering a significant role and slowly opening a way to emancipation.

It was not a coincidence that in the post-unification decades Lombard teachers were competent, self-conscious and keen on their rights, with their school magazines and local trade unions which were in the lead of the national scene. Moreover, female teachers in Milan quickly outnumbered their male colleagues anticipating a national trend⁶⁰. Last but not least, the reception of

⁵⁹ Toscani, *Scuola e alfabetismo nello Stato di Milano da Carlo Borromeo alla Rivoluzione*, cit.

⁶⁰ Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento. Il contributo di Maria Magnocavallo (1869-1956)*, cit.; Ead., *Il maestro nella scuola elementare italiana dall'Unità alla Grande Guerra*, in R. Sani, A. Tedde (edd.), *Maestri e istruzione popolare in Italia tra Otto e Novecento: interpretazioni, prospettive di ricerca, esperienze in Sardegna*, Milano, Vita e Pensiero, 2003, pp. 19-80.

the normal method, of Milde's pedagogy and of text-books that came from Austria produced innovations in teaching which would be present also after the unification⁶¹.

⁶¹ Bianchini, *Tra utopia e riforma della scuola: la metodica e il libro per l'istruzione elementare nell'Italia della Restaurazione*, cit., pp. xxxvi-xi; Id., *La nascita delle discipline scolastiche nel Piemonte della Restaurazione*, in Id. (ed.), *Le origini delle materie. Discipline, programmi e manuali scolastici in Italia*, Torino, SEI, 2010, pp. 36-43. The text-book for candidate teachers *Primi principii di metodica* published in 1849 by G.A. Rayneri, professor of pedagogy in the University of Turin, for instance, depended on Peitl, and was used for many years after the unification, see G. Chiosso, *Alfabeti d'Italia. La lotta contro l'ignoranza nell'Italia unita*, Torino, SEI, 2011, pp. 211-214.

Formation and institutionalisation of education for female teachers, during the second half of the 19th century in the Czech Lands

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ABSTRACT: This paper aims to clarify the formation and institutionalization of girls' education, leading to teachers profession, in the second half of the 19th century in the Czech nationalist middle-class. To clarify the development will be approached from the perspective of discursive role of women. Attention will be paid, in the first part, to the historical context shaping of teaching as profession during the school reforms of Maria Theresa and normatives that restricted women in that profession. In the next section we will focus on clarifying changes discourse of femininity that was in the Czech environment depends mainly on educational concepts. The beginning of female teaching profession is placed in the 60s years of the 19th century, especially with the release of the Imperial School Act in 1869, which allowed women to perform the teaching in public. Attention will be also paid to current reactions provoked by women in a male teachers' stuff, during the second half of the 19th century.

EET/TEE KEYWORDS: Women's Education; Educational Reform; Teaching Profession; Women's Work; Role Perception; Czech Republic; XIX Century.

Introduction

Theme of women's education during the 19th century is nowadays a key issue in the modern and postmodern historiography in the context of women's history and gender history¹.

¹ Especially in this topic can be very inspirational source of Anglo-Saxon tradition of History

Within the Czech historiography is the issue of girls' education given smaller, but not insignificant attention. The tradition of that theme dates back to the turn of the 19th and 20th century², when girls' education was delicate issue. Just as it was important topics for post-revolutionary period in which we record the development from the 90s by the 20th century³.

Contribution of this paper is anchored in the discipline History of pedagogy⁴, focused on specific theme of formation of girl's education leading to their profession of teacher. The paper is also motivated by an underestimation of the issue in the current historiography of that discipline. The contribution of the work is also to integration of post-modern theoretical approaches with traditional themes. Theoretically, come out from the gender history, applied within the discursive formations of womanhood. As well as the traditional concept of separate spheres based on critical works of women's history. The aim is to outline the traditional topics in the current context of theoretical approaches from one point of view, but not to define the main direction of the history of pedagogy.

Framework of this paper is limited by the second half of the 19th century in specific context of the Czech lands⁵ and Czech environment⁶. This paper therefore seeks to clarify the transformation of teaching as a male profession to a female profession. The issue of women's professions generally related to the social position of women in society. This paper tries to use the knowledge of current historiography of women's history and gender history, to explain the process in the background of social position of women.

Firstly, attention would be paid onto historical context, which was based on the background of general dominant social discourse of separate spheres, by which is needed to reconstruct the formation of teacher as profession which was under the influence of dominant social discourse, by which were women from professions generally excluded.

education, where it became given theme crucial to the development of the discipline.

² At that time was the question of girls' education developed in the context of Czech women emancipation movement, as was the issue developed within the emerging discipline of History of pedagogy.

³ During the 90s of the 20th century is the issue of girls' education rather issue of general historiography, with prevailing interest of the history of women emancipation movement and the role of women in society in the 19th century.

⁴ Term History of pedagogy is used to different to various tradition of Anglo-Saxon tradition represented by History of education, traditionally is History of pedagogy specific for the countries of the former Austro-Habsburg monarchy. The origins of the discipline date back to the second half of the 19th century, were laid the foundations of pedagogy as a science.

⁵ During the second half of the 19th century, Czech Lands were the part of the Habsburg Monarchy and later on from 1867 to 1918 part of Austro-Habsburg Monarchy.

⁶ Czech environment is in that context understand as a Czech national movement which was defining against germanization, in politics, culture, language and also education (in a very simplistic view).

And secondly we would be able to delineate the penetration of women into the public sphere, which was implemented in the Czech Lands through education and socio-economic needs of women which appeared in the second half of the 19th century in the Czech environment. Attention will be focused on the transformation of the dominant discourse realized through female activism in the context of Czech national movement. Thanks to that, changes could be reconstructed also in formation of female teacher profession.

Historical context

Nowadays, in the Czech Republic we are facing to problem of ‘feminisation’ of teacher staff, which is very good seen at praxis, but also at proportions of female and male students at Faculties of Education. Teacher’s profession is currently predominantly occupied by women, from pre-primary to secondary education. On the other hand, teaching was historically shaped as a masculine profession, from which women were traditionally excluded.

In the historical context, we try to outline the conditions which preceded the formation of female teaching profession during the second half of the 19th century. Attention will be paid to construct of female roles, which determined the possibility of girls in terms of education and also in their professional career.

For clarification of the question is necessary to focus on the period when began the professionalization of teachers⁷, thus to the second half of the 18th century. At that time we firstly noted the emergence of the teaching profession as a whole, due to educational reforms of Empress Maria Theresa. As a result of the establishment of the state school system for elementary⁸ and secondary⁹ education was also to adjust the requirements for teachers. The teacher became a state employee receiving a state salary, with the necessity of a public teacher qualification and education separately for the elementary and secondary level¹⁰. Necessary qualifications for elementary level could be obtained in several months’ courses in so called *preparandy* realised by normal schools

⁷ Associated with a state paid professions.

⁸ Adjustment of elementary education was generally set in the Habsburg monarchy by issuing so called *Teresian General School Order* prepared by Johann Ignaz. Felbiger in 1774 and edited in 1775 (*Allgemeine Schulordnung für die deutschen Normal-, Haupt und Trivialschulen in sämtlichen Kayserlichen Königlichen Erbländern*).

⁹ Reorganization of secondary education was conducted in 1775 by Gratian Marx, thanks to this were most of grammar school (*gymnázium*) transferred under state control.

¹⁰ Given double-tracking of teacher training was in the Czech lands, characterized until 1947, when they were established Faculties of education, which merged the two teacher training degrees.

(*Normalschule*)¹¹. Later on was founded Institutions for teachers education realised by two years courses by general schools (*Hauptschule*). On the other hand, preparing for the secondary level was always realized at universities.

At the time, it is necessary to consider the status of women, by which women were in professional and public life excluded. Furthermore, we focus on the general theory, based on which we can explain the exclusion of women from public life career. Thanks to the definition of women's social roles and its changes, it is possible to describe the emergence of the penetration of women into traditionally male teacher training during the second half of the 19th century.

For an explanation of the social role of women will be looked at it from the perspective of ideology of separate social spheres mostly presented by feminist historiography¹². The ideology of separate spheres presumes that women and men are inherently different and that the sex differences as well as the resulting separation of spheres are so called 'natural'. According to separate sphere was the role of women predominated to private sphere (household), while man was determined to public sphere (profession).

For understanding a significance of given issues we needed to start at the beginning of the formation of separate spheres, which were constructed under the influence of Enlightenment ideas, with the requirement of natural law reflected also in the requirement of a new social order, which was undergoing by a change from the so called 'divine order' to the so called 'order of nature'. Normative differences between a man and a woman (new social order) were further developed and justified such as medical, philosophical, and legal discourses.

From the medical perspective were the biological differences between women and men crucial for distinction of sphere of influence and realization of their roles¹³, as illustrated Thomas Laqueur, were female and male body newly conceived under the influence of expansion of medical science, emerging physical differences between the sexes and involved in the new concept of the two-sex model, which changed yet valid one-sex model¹⁴. The newly discovered biological differences may be due to be considered as the beginning of the exclusion of women from the public sphere, as we could use quotation of T. Laquer: «Thus the equation of heat and menstruation could be the basis for

¹¹ *Allgemeine Schulordnung*, 1775, §11.

¹² The ideology of separate sphere is one of the basic theme and theory of feminist historiography developed by anglo-saxon tradition of women's history from the 60s and also by gender history from the 80s by the 20th century.

¹³ L. Jordanova, *Sexual Visions. Images of Gender in Science and Medicine between the Eighteenth to Twentieth Centuries*, New York, Harvester Wheatsheaf, 1989; Id., *The Social Construction of Medical Knowledge*, «Social History of Medicine», n. 7, 1995, pp. 361-382.

¹⁴ T. Laqueur, *Making Sex. Body and Gender from Greeks to Freud*, Cambridge, MA., Harvard University Press, 1990.

case against women's participation in public activities [...]»¹⁵. The work of cited author was one of impulses for rethinking of reconstruction of women role according to her body during the 18th and 19th century¹⁶.

Significantly was concept also presented in the philosophical discourse where we can record the important representatives of philosophical thought as Kant, Hegel, Fichte, received the concept of women designed for private sphere. Many philosophers dealt especially justification the legal definition of women, as we could represent by words of Geneviève Fraisse:

Philosophical discourse about women and sexual difference necessarily stands at the crossroads of history [...] and the eternal philosophical questions of mind-body duality, nature versus civilisation, and private-public equilibrium¹⁷.

In the context of education can we bring about one of the most cited philosophers of education by Jean Jacques Rousseau, who determined the role of women in his work *Emil, or on Education*, where he outlined the role and education of Sophia as subordinate to Emil.

Therefore it is not fitting that a man of education should choose a wife who has none, or take her from a class where she cannot be expected to have any education. But I would a thousand times rather have a homely girl, simply brought up, than a learned lady and with who would make a literary circle of my house and install [...] Her honour is to be unknown; her glory is the respect of her husband; her joys the happiness of her family¹⁸.

By this perception of social role of women was also reflected in the concept of education, which was, just as bipolar social sphere, divided into formal prepared to professional life and therefore reserved for men, while non-formal education (home education) has been determined to women.

Formation of female teacher profession

In the following section we will focus on the development of specific penetration of women into the public sphere, that is, so to assert teaching as

¹⁵ *Ibid.*, cit. p. 216.

¹⁶ As we can represented also in Czech environment presented for example by D. Tinková, *Přirozený řád a ideologie oddělených sfér. Příspěvek k otázce konstruování 'přirozené role ženy' v pozdně osvícenské vědě* [Natural order and the ideology of separate spheres. Contribution to the question of constructing 'natural role of women's in the Late Enlightenment science], «Kontext: Časopis pro gender a vědu», vol. 3/4, 2003, pp. 1-17.

¹⁷ G. Fraisse, *A Philosophical History of Sexual Difference*, in G. Fraisse, M. Perrot (edd.), *A History of Women in the West. IV. Emerging Feminism from Revolution to World War*, Cambridge, MA., Belknap Press of Harvard University Press, 1993, pp. 48-79, cit. p. 48.

¹⁸ Revised work of J.J. Rousseau, *Emile*, Middlesex, Echo Library, 2007, pp. 349-350.

a female profession. We start with changes which graduated during the 19th century, and disrupted dominant discourse, both within the social spheres as well hand in hand in the educational discourse. The changes would be captured only in specific conditions of the Czech lands within the Czech national bourgeois and rural middle-class.

The process must be viewed in the context of the Czech women's emancipation movement¹⁹ that created during the 19th century the conditions for changes in the status of women in Czech society, which took place especially through education.

The main role in this development played particular society's activity, within which there was promoted a formation and institutionalization not only higher girls' schools, but also schools for the preparation of teachers, mostly private.

The development, we could capture in major educational concepts that reflect the role of women and their transformation, but also a different institutionalization of girls' higher education during the second half of the 19th century. Due to the requirements of Czech women and the gradual transformation of their social roles, create the conditions for the professionalization of women teachers.

On the example of major educational concepts that determine the form of higher girls' education, we can show that changes.

In total, during the second half of the 19th century we can record three of these concepts.

The first educational concept was determined by prevailing social discourse of separate spheres, when girls' education was intended for their role in the private sphere. The concept can be called 'education of good housekeeper, wife and mother'. This concept was promoted especially within the informal education through *prescriptive literature*²⁰ and private courses for girls.

For the representation of the goals of the concept we can quote one of the most important representatives, Sofia Podlipská:

To be a good housewife, understand the kitchen and throughout the home, it should teach every girl, even one that deals with the otherwise quite different career dedicating to studies, the arts, commerce, and industry²¹.

¹⁹ Czech women's emancipation movement was very moderate movement that did not maintain radical political demands, as they did in Great Britain. Due to different social situations Czech women engage in patriotic struggle for the Czech nation against Germanization. This patriotic battle was also through requirements for Czech schools where they just added a strong voice of Czech women with a requirement for Czech girls' schools.

²⁰ Prescriptive literature is a term that is used in the context of the guidance advice literature on how to educate girls at home, given literature can also be seen as the first female feminist literature, despite its importance lies in the preservation of the traditional role of women.

²¹ S. Podlipská, *Přednášky Spolku Domácnost* [Lectures of Household society], 3. Praha, Nákladem spolku Domácnost, 1889. Citation translated by author.

This concept was predominantly important throughout the 19th century, whose origins can be observed in the first half of the 19th century. The origins are linked with the activities of one of the first Czech feminists Marie Dobromila Rettigová²², known for her cookbooks for girls, where there are also tips on how to be a good wife and especially patriot. On her legacy continue many representatives in the second half of the 19th century, namely Františka Hansgírgová, Věnceslava Lužická-Srbová²³ Sofia Podlipská²⁴ or Růžena Jesenská, whose ideas on the education of girls were institutionalized through association named *Household* («Domácnost»), and subsequently *Household cooking school*, established in the mid-80 years of the 19th century. The influence of the educational concept can be observed also in the informal private initiative consequently in establishment of the Housewife schools²⁵.

For the monitoring formation of teaching as a female profession is significant other educational concept, which can be named as ‘careers education’ or ‘education to the profession’. The second educational concept became increasingly important during the 60s in the 19th century, mainly due to a number of interconnected factors that contributed to the disruption of the traditional discourse of womanhood, which started by the social demand for higher girls’ education, which would lead to their economic independence as we could picture by original citation of a member of school council by František Mareš «It is necessary that the girl was given the opportunity to educate also to economic independence»²⁶. Incidentally, we can also notice the anchoring

²² M.D. Rettigová, *Mladá hospodyňka v domácnosti, jak sobě počínati má, aby své i manželovy spokojenosti došla. Dárek dcerám českoslovanským* [Young housewife in a household, how to behave in order to satisfy herself and her husband. A Gift to Czech-Slavic girls], Praha, J.H. Pospíšil, 1840.

²³ V. Lužická Srbová, *O působení matky v rodině* [The effect of the mother in the family], Praha, Al. Hýnek, 1877.

²⁴ S. Podlipská, *Listy staré vychovatelky k někdejší schovankám: Sestrám Slovanským* [Leaves of old former nanny for the girls: To Slavic Sisters], Praha, Tiskem a nakladem Dr. Ed. Grégra, 1868; or Id., *Příklady z oboru vychovatelského* [Examples in the field of preceptorship], Praha, J. Otto, 1874-1875.

²⁵ Housewife schools focused on education in areas such as domestic farming, animal husbandry, dairying, husbandry, cooking, cleaning, hygiene, sewing clothes, washing and ironing, canning; For example, the issue more in M. Bahenská, *Počátky emancipace žen v Čechách. Dívčí vzdělávání a ženské spolky v Praze v 19. Století* [The beginnings of the emancipation of women in the country. Girls’ education and women’s groups in Prague in the 19th century], Praha, Libri-Slon, 2005, pp. 124-130; or M. Neodorfová, *České ženy v 19. století. Úsilí a sny, úspěchy a zklamání na cestě k emancipaci* [Czech women in the 19th century. Efforts and dreams, successes and disappointments on the road to emancipation], Praha, Janua, 1999.

²⁶ F. Mareš, *O dívčím vzdělávání, psáno roku 1896* [The girls’ education, written in 1896], in Veletovská-Humplová (ed.), *Ženy na Moravě. Ve prospěch chudých dětí českých škol brněnských*, cit., p. 11.

of the right to education and profession in the Imperial Act N. 142²⁷ in which literally states that «each has the right to choose their profession and education leading to it as he likes»²⁸.

The concept was based on public demand in the Czech lands mainly motivated by the economic situation of girls. From 60s years began to decline a number of unmarried girls of the middle class²⁹, which led to question of who these women economically secured. Among the first who reacted to this new situation, were women's societies. Under the influence of ideas ensure women skilled jobs were created also the first *vocational schools*, which were in hands of private associations. New centres for vocational training for girls were soon in the 60s years formed in Prague by well known as *Female Manufacturing Czech Society*³⁰ («Ženský výrobní spolek český») later on in 70s years in Brno by association *Vesna*³¹, also schools were represented in other towns in the Czech lands as in Olomouc at the end of the 19th century presented by *Society Institute of Earl Pötting* («Spolek Ústavu hraběte Pöttingas»). It is also necessary to mention crucial personalities in the formation and institutionalization involved and promotes it, which were also famous Czech writers, such as Karolína Světlá, Eliška Krásnohorská, Sofie Podlipská etc.

The most common types of schools were industrial schools, trade schools, drawing schools, lace schools, training schools for teachers and nurses but not with the public's right, and always private.

Thanks to the institutionalization of girls' education, although private, was broken the traditional boundaries between the public and private sectors, within this could be seeing the beginnings of the professionalization of women as teachers.

Significant shift in the girls' education began in the 60s years, gradually turning women's role, and shifted the development of girls' education still further. The shift in girls' education can be observed on the third educational concept simply named as «complete education» led to study at university, which is among the most adventurous and unique in the countries of the Habsburg monarchy.

²⁷ *Reichsvolksschulgesetz bezeichnete Gesetz für die im Reichsrat vertretenen Königreiche und Länder das Schulwesen in Österreich*. 21. December 1867, no. 142.

²⁸ *Ibid.*, article 18.

²⁹ The situation was caused by the decline of men, due to the Prussian-Austrian war.

³⁰ The activity of the the association is described for example in the work: Bahenská, *Počátky emancipace žen v Čechách: Dívčí vzdělávání a ženské spolky v Praze v 19. Století* [The beginnings of the emancipation of women in the Czech Republic: Girls' education and women's groups in Prague in the 19th century], cit.; also J. Malínská, *Do politiky prý žena nesmí – proč?* [No women in politics – why?], Praha, Slon-Libri, 2005.

³¹ For more information see: A. Kalinová, L. Nováková, *Dcerám českým: brněnský vzdělávací spolek Vesna v letech 1870-1920* [The daughters of Czech: Brno Vesna Educational Association in 1870-1920], Brno, Moravské zemské muzeum, 2007.

The first requirements emerged from the 70s years, but the study of girls at grammar schools were allowed only in the form of private persons. The first requirements emerged from the 70s years, but the study of girls at grammar schools were allowed only in the form of private persons. Most girls the option not used because of social norms still girls did not allow such a study; in addition, isolated cases have been considerably limited. Much more significant support to that concept came up in the late 80s years, thanks to the initiative by Eliška Krásnohorská. The result was the establishment of the first girls' grammar school in the Habsburg monarchy, according to the founding association named Minerva³². Many graduates also became the first female students at the university at the end of the 19th century.

Formation of female teacher profession was determined by several mutual aspects. As outlined above, the professional sphere was within the dominant social discourse addressed to men, until the second half of the 19th century. Women were determined by the private sector, which also limited their education on an informal and private. Thanks to the breaking traditional role of women, in particular due to the mentioned second educational concept, it was also possible to started professional career for women³³. Among the first professions that women could hold in public was just teaching, whereas the education was tolerated as one of the natural activities of women. It should be noted that the role of teachers obviously have a much longer tradition where women played the role of governesses in the upper social classes, as well as women teachers occurred in the past, especially in private schools³⁴. Women could not therefore play the role of teachers of publicly³⁵. As we indicated above, the teacher profession on the other side had to be viewed from the perspective of government employee, paid by State and with the necessity of required qualifications (the teaching competency).

³² Attention was paid to that issue in Czech publications such as: H. Směřičková (ed.), *První české dívčí gymnázium. Sborník ke 100. výročí založení* [The first Czech girl's grammar school. Proceedings of the 100th anniversary], Praha, Ústřední ústav pro vzdělávání pedagogických pracovníků: Minerva, 1990; further F. Morkeš, *Když se řekne Minerva* [When you say Minerva], «Česká škola», n. 3, 1996; and other sub-studies.

³³ An interesting overview to the girls' careers into the 1916, compiled by J. Kafka, where most represented was the craft professions, social care, a governess and teacher, as well as business, management, arts, academic, light industry, etc. see J. Kafka, *350 ženských povolání: příručka nezbytná pro rodiče, jejich zástupce, vychovatele, rádce mládeže dívčí, dívky i ženy všech tříd, jež připravují se k manželství a hledají povolání a výdělek* [350 female professions: essential guide for parents, their representatives, educators, mentor young girls, girls and women of all classes, who are preparing for marriage and seek occupations and earnings], Praha, F. Šimáček, 1916.

³⁴ Private teacher can perform her role without qualification, or since 1849 to attend private two-years courses for educators and teachers, carried out sporadically in some higher girls' schools.

³⁵ M. Lenderová *et al.* (edd.), *Žena v českých zemích od středověku do 20. Století* [A woman in the Czech lands from the Middle Ages to the 20th century], Praha, Lidové noviny, 2009, pp. 428-429.

The turning point in the development of that issue can be seen therefore issuing of the *Imperial Education Act*, commonly known as Hasner School Act, in 1869³⁶. Leaving aside general importance for teacher education, it must be emphasized the establishment of both private and public teaching institutes for girls³⁷. Especially for girls it was essential that the education was for free³⁸. Common qualifications for girls and boys was so called «certificate of maturity»³⁹, but the condition for the further functioning as a teacher, was a teacher qualification examination (*Lehrbefähigung zeugnis*) with receiving certificate of the teaching competency (*Ehrbefähigung prüfungen*), after two years of practice⁴⁰. This qualification only allowed teaching at the newly established 'civic' and 'national schools' (*Volksschulen und Bürgerschulen*)⁴¹.

Among the first public teacher-training institutes could be represented by the St. Anne Institute in Prague⁴², originally it was the private teaching institute, dates back to 1866, which was just changed to public status in 1970. In the Czech lands we can record rather an increase number in private teaching institutions, most of which were in the hands of the church. This could be illustrated by the overview of teaching institutes, compiled by the one of the leading historians of pedagogy by Otokar Kádner⁴³. Based on his facts of the Austrian countries, including the Czech lands, were established into 1913 a total of 77 state teachers' institutes, of which only 2 were Czech girls teacher-training institutes, in Prague and Brno⁴⁴. It follows that most Czech girls' institutions were private, primarily established by churches. By which the most important orders were generally Ursulines, the most important were founded in Kutná Hora, 1891 and Olomouc, 1898⁴⁵. New possibilities for realization for number of female teachers were in addition to educational activities, also in charity, community care or nursing⁴⁶.

Although theoretically conditions for women were set very welcoming, the practice shows us a different perspective. As an example for all, we could see

³⁶ *Reichsvolksschulgesetz für die im Reichsrat vertretenen Königreiche und Länder das Schulwesen in Österreich*, 14. Mai, 1869.

³⁷ *Ibid.*, in section III, §30 was also enshrined the curriculum, consisting of: religion, manners and science of teaching, history of education, grammar, literature, geography, history, mathematics, science, drawing, singing, home economics, foreign language, women's handicrafts, gymnastics.

³⁸ *Ibid.*, § 37.

³⁹ *Ibid.*, § 34.

⁴⁰ *Ibid.*, § 38.

⁴¹ *Ibid.*

⁴² Lenderová *et al.* (edd.), *Žena v českých zemích od středověku do 20. století*, cit., p. 428.

⁴³ Otokar Kádner (1870-1936) is today considered as one of the most important founders of Czech history of pedagogy, especially thanks to its extensive processing development of education system in the Czech lands.

⁴⁴ O. Kádner, *Vývoj a dnešní soustava školství I* [Development and today's education system I], Praha, SFINX Bohumil Janda, 1929, p. 222.

⁴⁵ Lenderová *et al.* (edd.), *Žena v českých zemích od středověku do 20. století*, cit., p. 429.

⁴⁶ *Ibid.*, pp. 431-432.

a view of male colleagues, which appeared on particular pedagogical press⁴⁷ from the 70s years of the 19th century. Mostly negative review was dealing problems of natural role of women and their ability to be a teacher, which was required certain qualification and skills. Most of them were focused on the prevailing views questioning feminine intellect, presented as «women are not good teachers as men»⁴⁸, which could be pictured also on the salary, which was for women reduced to 80 per cent for the same position during 70s years.

During the 80' years we could register mostly positive reactions, largely focused on the positive contribution of female elements at schools, especially at rapidly growing of private girls' higher schools. There were also underlined their roles in local community «as a models for young girls»⁴⁹.

Most part of positive reaction occurred also in male colleague in «Teacher Newspaper»⁵⁰.

These attitudes were justified by natural essence of female as governesses and mothers, which were also in fact limitation of their profession.

Central issues of female teachers was the question of celibacy, which was legalised in 1875 with validity up to 1919 and by which was provoked several discussions solving prevailing opinions of traditional role of women as mother, wife and housewife, which couldn't be tolerated with profession. So when female teacher got married she had to leave her job and pay attention to her new family.

Despite the problems that stood in front of the girls during the second half of the 19th century, we can generally say that the Czech lands, created the conditions that allowed women to further their career opportunities, where the most important was just teaching. Together with the abolition of celibacy after 1919 was started the new era for female teachers, which was directed through socialist schooling, to nowadays situation of feminisation of teachers staff, but it is a question if it is good way for our education for nowadays.

⁴⁷ Among the most important was: «Journal of National School», 1869 («Časopis národní školy»), «Teacher Newspaper» 1884, 1887 («Učitelské noviny») and also «Journal for Female Teacher» 1885, 1888 («Časopis pro učitelky»).

⁴⁸ J. Dběra, *Bylo by obcím prospěšno, aby ustanovovaly světské učitelky na školách dívčích? Jsou-li ženské s to, aby plnily všechny povinnosti, jež vyučování dítek vyžaduje?* [It would be beneficial to municipalities that ordained secular teachers in girls' schools? When women in a position to fulfill all the obligations that requires teaching of children?], «Národní škola», n. 7/10, pp. 73-74.

⁴⁹ M. Geislerová, *O úkolu učitelek ve škole a mimo školu* [The task of the teachers in the school and outside school], «Učitelské noviny», n. 5/38, 1887, pp. 448-449.

⁵⁰ J. Hylák, *K otázce učitelek* [The question of female teachers], «Učitelské noviny», n. 2/37, 1884, pp. 437-439.

Conclusion

In conclusion, it is necessary to summarize the previous findings. The aim of this paper was to outline the evolution of the formation and institutionalization of girls' education, leading to the profession of the teacher.

In this issue, we proceeded to the solution in the context of changes of women's role in society that accompanied the women from the second half of the 18th century from the time when they were laid foundations of teaching as a profession, thanks to Maria Theresa. Attention was paid to the definition of women within separate spheres through which the women were from the public professional life excluded, as well as from the possibilities of public education.

The main part of the paper is focuses on the second half of the 19th century, which can be considered as the beginning of the professionalization of female teachers. There were outlines key aspects that are involved in the process, both growing emancipating activity of the Czech girls and women, particularly in the societies' activities, as well as the growth of private girls' schools. There were also outlined key educational concepts that have shaped the institutionalization of higher girls' education, within which it is possible to record the tendency for vocational education, from the 60s years of the 19th century. Beginning of professionalization of female teachers can be seen in the release of the *Imperial School Act* in 1869, thanks to which women were allowed to exercise the profession publicly and also be educated. The following years were not for the women in this profession easy, in society and among male colleagues could be recorded, especially from the beginning, considerable resistance. Change came from the 80s of the 19th century when there was a vindication of female teachers that have been associated with their natural role as mothers. At the same time were set other conditions for the performance of the profession, and that was celibate.

However, the profession of a teacher provided one of the important women's emancipation and economic independence, through which very soon was profession dominated by women.

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Die berufliche und nationale Emanzipation der tschechischen Lehrerschaft im letzten Drittel des 19. Jahrhunderts. Motive, Ziele, Erfahrungen und Reflexionen

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Professional and national emancipation of Czech teachers in the last third of the 19th century. Reasons, objectives, experience and reflection

ABSTRACT: In pedagogical discussions, the last third of the 19th century can be understood as the outcome of both Czech teachers' effort and efforts of personalities of Czech pedagogy to gain professional and national emancipation in education in Czech lands of the Austrian monarchy. On the basis of liberal laws and, in particular, the so-called associational law, with regard to dynamically changing pedagogical discussions and reality after release of modern school Hassner Act, it is possible to reconstruct a purposeful and ideological effort of Czech teachers on development of national education. Active work of associations was meant to support development of national issues in educational debates in Czech lands, as well as establishment of self-help teachers' organizations which should contribute to professional development of teachers. Teachers' congresses, unions, and associations wanted to help educate teachers, identify main problems of educational system, and contribute to their solution. The discussion on school reform issues was closely linked to current issues on the formation of Czech modern pedagogy. This paper discusses the connection between teachers and pedagogy as a science and explores the connection between mutual issues of teachers' educational programme and concepts of pedagogical theory. On the basis of reconstruction of discussions in major pedagogical and teachers' journals and in comparison with efforts of academic pedagogical discussions, the study searches for dominant and relevant discourse tendencies, practice and program points that formed pedagogical process.

EET/TEE KEYWORDS: Teacher Education; Pedagogical Theory; Educational Reform; Teacher Role; Teachers' Organisations; Czech Republic; XIX Century.

Betrachtet man die berufliche und nationale Emanzipation der tschechischen Lehrerschaft in den böhmischen Kronländern im letzten Drittel des 19. Jahrhunderts in den böhmischen Ländern, sind wir konfrontiert außer anderen Merkmalen mit einer hochgeladenen nationalen Diskussion. Es handelt sich um die Zeit, als in der Monarchie ein starkes nationales bis nationalistisches Bewusstsein zu wichtigsten Handlungsbedingungen und Identitätsmerkmalen wurde. Obwohl die kaiserliche Hofpolitik eine österreichische, nicht nationalistisch geprägte Identität, sondern wesentlich patriotische und vor allem länderbezügliche Identifizierung der Bürger mit der Monarchie unterstützen wollte, gelang es nicht so sehr solches Projekt durchzusetzen. Stattdessen wurde in der multinationalen Monarchie die nationale Frage immer wichtiger. Die politische Situation in der Mehrvölkermonarchie wurde deshalb vor allem vom Drang der einzelnen Nationen zu ihrer kulturellen, sozialen und politischen Emanzipation geprägt. Die politische Repräsentanz in den böhmischen Ländern wurde daher in nationale Lager geteilt und das Erreichen von politischen Aufgaben sowohl im Landtag, als auch auf der Reichsebene wurde im Paradigma des nationalen Kampfes gesehen. Die national geprägte Sichtweise des Alltags wurde desto intensiver, je weniger die politischen Forderungen der sich schnell emanzipierten tschechischen Nation ausgehört und durchgesetzt wurden und die privilegierte Stellung der deutschen Kultur in den böhmischen Ländern dadurch nicht ausgeglichen werden konnte, je intensiver und erfolgreicher die deutsche nationale Bewegung war und der nationalistische und völkische Diskurs im deutschösterreichischen Lager auf Relevanz und Kraft gewann. Statt einer Debatte, in der die nationale Gegebenheit im Gegensatz zur national neutralen und eher ländergeprägten Identität im Hintergrund gestanden hätte, zeigt sich leider sowohl auf der deutschen, als auch auf der tschechischen Seite ein Bemühen um Wohl der Nationen statt um Wohl der böhmischen Länder. In diesem Diskurs lief auch die Lehrerdiskussion in den Lehrervereinen, die nach 1869 im Großen in böhmischen Ländern entstanden sind und infiltrierten diesen Diskurs. Die Lehrervereine wurden zum Institut, das sich aktiv um die nationale Forderungen einsetzte und die nationale Identität intensiv aufbaute und pflegte, wie noch im weiteren analysiert wird.

Der Begriff Emanzipation, aus dem lateinischen *emancipatio* «Freiwerdung», bedeutete ursprünglich Befreiung des Sohnes von der Abhängigkeit oder Macht seines Vaters, als der Sohn wirtschaftlich selbständig wurde. Seit Ende des 18. Jahrhunderts begreift man die Emanzipation als «Bemühen um Befreiung von verschiedenen traditionellen, z.B. religiösen, kirchlichen, sozialen,

nationalen Einflüssen und Beschränkungen»¹. In diesem Sinne kann man die Emanzipationsbewegung der Schule, des Lehrers, des Volkes als Folge des Gedankens der Freiheit, Gleichheit und Humanität sehen. Der Beitrag beobachtet, wie die berufliche Emanzipation der Lehrerschaft als Befreiung von kirchlichen Einflüssen und von der staatlichen aufklärerischen und zentralistischen Bürokratie verlaufen ist und wie das berufliche Programm der Lehrerschaft der Volksschulen formuliert wurde, das auf autonomer und fachlich-pädagogischer Diskussion beruhte. Weiter fragt man sich, wie verliefen die Prozesse der Bildung von nationaler Emanzipation der tschechischen Lehrerschaft. Dabei fokussiert man, wie bei der tschechischen Lehrerschaft einerseits die Befreiung vom kulturellen deutschösterreichischen Einfluss verlief, andererseits konzentriert man sich auf die Dynamik der Förderung und Entwicklung des Prozesses des Nationalbewusstseins in ihrer Reihen, dabei handelte es sich nicht um «eine direkte Entwicklungslinie, sondern um ein Prozess, das voll von Konflikten und Überraschungen war»².

Der Lehrer als Berufsrepräsentant

Im Zusammenhang mit der beruflichen Emanzipation befinden wir, dass am Anfang des betrachteten Zeitraums die Vereinstätigkeit der tschechischen Lehrerschaft mit einer scharfen Kritik der österreichischen liberalen Schulpolitik begann, die für die Lehrer von Anfang an das im Mai 1869 angenommene Hasner'sche³ Schulgesetz und weitere Verordnungen zu seiner Durchführung verkörperte⁴. Obwohl es sich um eine Schulnorm handelte, die das Schulsystem modernisierte und die Stellung der Volksschullehrer professionalisierte, wurde sie seitens der tschechischen Lehrereleite scharf kritisiert, ebenso ihr Verfasser und seine Nachfolger in der Funktion des Schulministers im neu gegründeten Ministerium für Kultus und Unterricht (März 1867). Das Hasner'sche Gesetz

¹ *Masarykův slovník naučný*, Teil II, Praha, Nákladem československého kompasu, 1926.

² B. Kudláčová, *Dejiny pedagogického myslenia I.*, Trnava, Trnavská univerzita, 2009.

³ Leopold Hasner (1818-1891) war Prager Deutsche. Er studierte Jura und in den Jahren 1851-1865 war er an der Prager Universität tätig, nach 1865 hielt er in Wien Vorlesungen. Seit 1861 war er in der hohen Politik engagiert. Das Amt des Schulministers vertrat er nach der Ministeriumsgründung im Jahre 1867.

⁴ Hasners Gesetz vom 14. Mai 1869, bedeutete eine komplexe Norm, die jeweils das Schulsystem neu aufbaute (Einführung neuer Schultypen: Volks- und Bürgerschulen), den inneren Lauf der Schule und des Unterrichts betraf, die soziale und rechtliche Stellung des Lehrers bestimmte, als auch die Lehrerbildung generell neu regelte. Es wurden sog. Lehramtsinstitute als vierjährige Mittelschulen mit der Reifeprüfung gegründet.

wurde in der Lehrer-Presse als eine liberale, fremde und dem tschechischen Lehrer aufgezwungene Norm bezeichnet, die nationalen Spezifika des tschechischen Schulwesens nicht respektieren kann⁵.

Analysiert man die Diskussion in den tschechischen repräsentativen Lehrerzeitschriften⁶ betreffend beruflicher Anforderungen, zeigt es sich, dass es verlangt wurde, die aufgebauschte Schulbürokratie abzuschaffen, die konsequenten Kontrollen von Schulbesuchen zu intensivieren, rechtzeitig den Lehrern ihren Lohn zu zahlen, die Verfolgung von aktiven und patriotisch denkenden Lehrern zu beenden, die Entstehung von Lehrervereinen und der aufklärerischen Lehrertätigkeit zu fördern und die Anzahl der tschechischen Lehrerbildungsanstalten zu erhöhen. Ebenfalls wurde in der pädagogischen Fachdiskussion betont, die Schülerschaft mit dem übermäßigen Lernstoff nicht zu überfordern und nicht nur auf die formale, sondern auf die praktische Bildung Acht zu geben, die das Kind in seinem zukünftigen Leben nutzt.

Lenken wir unsere Aufmerksamkeit auf die beruflichen Anforderungen der tschechischen Lehrerschaft, die aus den Lehrerversammlungen in den Jahren 1870-1891⁷ hervorgingen, stellt man fest, dass gefordert wurde, das Schulwesen auf Landesebene zu verwalten und nicht zentral aus Wien. Somit sollten Spezifika der einzelnen Länder und vor allem ihrer Völker berücksichtigt werden. Im Jahre 1886 erscheint die Anforderung, dass die Ortsschulräte in den national gemischten Gebieten tschechisch und nicht deutsch sein und ihre Vertreter nicht durch Gemeinderat (falls er von deutschen Gemeindevertretern besetzt wurde), sondern direkt durch die Einzahler gewählt werden sollen. Es wurde verlangt, das Schulgeld an den Volks- und Bürgerschulen abzuschaffen und die Entwicklung von Bürgerschulen zu fördern. Unterstützt wurde auch die Gründung von Lehrervereinen, wo sich die Lehrer verbünden und weiterbilden sollten. Es

⁵ T. Kasper, D. Kasperová, *České učitelstvo a Hasnerovy zákony 1869*, «E-Pedagogium», n. 3, 2010, pp. 26-37.

⁶ Es handelt sich um folgende Lehrerzeitschriften: *Posel z Budče 1850-1900*, *Komenský 1873-1900*, *Beseda učitelská 1869-1900*.

⁷ Erste Lehrerversammlung fand vom 30.8.-2.9.1870 in Prag. Sie wurde von 1500 tschechischen Volkslehrern besucht, die aus Böhmen, Mähren, Schlesien, Slowakei jedoch auch aus entfernten slawischen Ländern – wie Kroatien, Slovenien kamen. Dadurch Wollte man ausser anderem die slawische Einheit demonstrieren. Die deutsche Volksschullehrerschaft aus den böhmischen Ländern nahm an der tschechischen Lehrerversammlung nicht statt und veranstaltete vom 20.-21. September 1870 eigene Versammlung.

Erste Lehrerversammlung der tschechischen Lehrerschaft wurde ausser anderem eine starke Demonstrierung von der Kraft und Einheit der tschechischen Volksschullehrerschaft betreffend ihrer Berufsanforderungen. Hier wurde erstes kompaktes Programm der tschechischen Lehrerschaft einstimmig angenommen.

Die zweite Lehrerversammlung fand vom 16.-19.8 1871 statt. Sie wurde eher eine nationale Feier zum 200. Todtgedenken von J.A. Comenius als eine Lehrerberufsversammlung.

Dritte Lehrerversammlung fand vom 4.-6. August 1880 in Prag statt. Es handelte sich um das Jahr 1880, als auch der Zentrallverband der tschechischen Lehrervereine gegründet wurde. Die dritte Lehrerversammlung zeigte sich deshalb als eine Verkörperung von Interessen des Lehrerberufsstandes. Weitere Lehrerversammlungen fanden im zweijährigen Zyklus statt.

wurde danach gestrebt, dass die Lehrer nicht den Dienstgesetzen unterliegen, sondern nur den bürgerlichen Normen, wie die anderen Bürger. Eine bedeutende Anforderung war die Reform der Schulinspektion. Diese Anforderung erscheint 1886, wo die Lehrerschaft verlangte, dass der Schulinspektor der Volksschule über eine genügende Praxis an diesem Schultyp verfügt und der Schulinspektor der Bürgerschule an jenem Schultyp. Die Lehrerschaft setzte sich darüber hinaus für die Möglichkeit einer engeren Zusammenarbeit mit den slawischen Lehrern, durch Teilnahme an den Versammlungen der slawischen Lehrerschaft oder an der Herausgabe der Zeitschrift *Der slawische Pädagoge* ein⁸.

Einen wesentlichen Meilenstein in der beruflichen Emanzipation des tschechischen Lehrerschaft stellt die Gründung des Zentralverbandes der tschechischen Lehrervereine in Böhmen im Jahre 1880. Laut der Satzung des Vereins war der Grundzweck der Organisation die Lehrerschaftsbildung zu unterstützen, ihre Interessen zu fördern und das Schulwesen zu verbessern. Diese Ziele sollten durch aktive Mitarbeit in dem Zentralverband, seine regelmäßige Bildungs- und aufklärerische Tätigkeit und Veranstaltung von Lehrerversammlungen erreicht werden⁹.

Widmen wir nun kurz die Aufmerksamkeit einem wichtigen Punkt in der beruflichen Diskussion der tschechischen Lehrerschaft im letzten Drittel des 19. Jahrhunderts, den pädagogischen Anforderungen in der Frage der Schul- und Bildungsreform. Obwohl wir erwarten würden, dass die Annahme des neuen Hasner'schen Schulgesetzes befriedigend ausfallen wird und ein Erkalten von Reformbestrebungen der Lehrerschaft verursacht, war das Gegenteil der Fall. Auch nach dem Jahre 1869 bemerken wir intensive Diskussionen bezüglich der Reformvorschläge im Bereich der Volksschulbildung und Erziehung. Bei der Analyse zeigt es sich deutlich, dass die reformpädagogische Diskussion der tschechischen Lehrerschaft viel früher gelaufen ist, als die Kannonbücher der Geschichte der Pädagogik ihren Anfang setzten¹⁰. Dabei wird deutlich, dass der Reformdiskurs immanent zu der pädagogischen Fachdiskussion schon im letzten Drittel des 19. Jahrhunderts gehörte.

⁸ Die Zeitschrift der Slawische Pädagoge erschien zwar nur kurz (1872-1874), jedoch die Aktualität des slawischen Einheitsgedankens demonstrierten außer anderem die Lehrerversammlungen der slawischen Lehrerschaft: 1870 Ljubljana, 1871 Zagreb, 1873 Wien.

⁹ *Stanovy Ústředního spolku jednot učitelských v Čechách*, «Posel z Budče», n. 40, 1879, pp. 813-816.

¹⁰ Gleiche Erfahrung bringt die Analyse von J. Oelkers, *Reformpädagogik. Eine kritische Dogmengeschichte*, Weinheim, Juventa Verlag, 1989.

Der Lehrer als Schulreformer

In den 80er und 90er Jahren des 19. Jahrhunderts forderten die Lehrer einen anschaulichen Unterricht, der sich auf das Leben des Kindes bezieht. Auf der einen Seite sollte die Schule die Welt des Kindes in den Unterricht mit einbeziehen und vom Kind ausgehen, auf der anderen Seite sollte sie erziehen und für das sog. Leben lehren:

Der Unterricht und die Erziehung an der Schule ist meiner Meinung nach vom Leben getrennt, hat mit dem wirklichen Leben nur wenig oder fast nichts zu tun; um es kurz zu sagen, die Schule achtet bisher nur wenig auf das wirkliche Leben, und legt der Jugend etwas vor, was diese dann im Leben nicht wiederfindet¹¹.

Die Verknüpfung der Schule mit der Gemeinde, mit der Umwelt, in der das Kind lebt, wurde unterstützt. In diesem Zusammenhang ermahnt bereits der führende Reformpädagoge Josef Úlehla¹² in der Zeitschrift *Komenský* 1873 dazu, dass der Lehrer mit den Schülern die Fabriken, die Bahnhöfe, die Glas- und Erzberge, Wirtschaftshöfe, das Feld, den Wald, die Wiese, die Weinberge usw. besuchen sollte. Die Kinder sollten in ihrer unmittelbaren Umwelt lernen¹³.

Als das zentrale Reformthema erscheint in der Diktion Comenius die so genannte natürliche Erziehung. Wie sollte man dieses Konzept verstehen? Der Begriff der Natürlichkeit, der natürlichen Erziehung, ist in der Bildungsgeschichte sehr problematisch. Man kann sagen, dass mit ihm eine hohe Anzahl von Pädagogen arbeitet, jeder darunter jedoch verhältnismäßig unterschiedliche Standpunkte und Vorstellungen entfaltet.

Aus der Perspektive der tschechischen Lehrerschaft des letzten Drittels des 20. Jahrhunderts bedeutet der natürliche Unterricht einen Unterricht, der die Bedürfnisse des Schülers und die Grundsätze des natürlichen Lernens respektiert. Das heißt, dass er darauf achtet, dass im Lernprozess vom Elementaren zum Schwierigeren, vom Konkreten zum Abstrakten, vom Einfachen zum Zusammengesetzten vorgegangen wird. Akzent wurde darauf gelegt, dass der Schüler eine genügende Zeit für die Aneignung des Lehrstoffs hat und mit dem Lehrstoff nicht überfordert ist. Man sollte lieber weniger lernen, jedoch gründlicher; alles sollte anschaulich sein¹⁴ und genügend anhand

¹¹ *Škola a život*, «Beseda učitelská», n. 5, 1882, pp. 57-60, pp. 57.

¹² Josef Úlehla (1852-1933) war einer der führenden Lehrer der böhmischen Lehrerschaft in Mähren, der sich für die Gedanken der freien aktiven Arbeitsschule einsetzte. Úlehla (1852-1933) pflegte den Positivismus in der pädagogischen Wissenschaft und übersetzte die Bücher von Herbert Spencer (1820-1903) – *Principles of Ethics* vom 1879 übersetzt ins Tschechische als *Dané pravdy mravoučné* im Jahre 1895 und das Werk *Education, intellectual, moral and physical* übersetzt als *Výchova rozumová, mravní a tělesná*.

¹³ J. Úlehla, *Jak by lid náš vzděláván býti měl*, «Komenský», n. 22, 1873, pp. 352-353.

¹⁴ K. Koblížek, *O názorném – vychování*, «Komenský», n. 10, 1874, pp. 145-148.

von praktischen Beispielen eingeübt werden¹⁵. Es ist offensichtlich, dass es sich im Grunde genommen um die Betonung von didaktischen verbal-anschaulichen Grundsätzen von Comenius handelt, was nicht überraschend ist, wenn wir erwägen, dass manche reformgesinnten Lehrer diejenigen waren, die die Schriften von Comenius ins Tschechische übersetzten und sich zugleich für die Verbreitung seiner Ideen und Grundsätze einsetzten. Manche reformgesinnten Lehrer dieser Zeit, wie vor allem František Zoubek¹⁶, waren doch zugleich auch die Gründer der tschechischen Komeniologie.

Betrachtet man weitere pädagogische Reformanforderungen der tschechischen Lehrerschaft, hört man laut die Anforderung des fächerübergreifenden Unterrichtes. Intensiv besprach man die Verbindung der Geographie und Geschichte zu einem Fach. Kritisiert wurde die positivistische Einstellung, die zu einer Fülle von Informationen über den Gang der Geschichte führte, die jedoch für den aktuellen Gesichtskreis des Kindes keine Bedeutung hatte. Der Akzent auf die Faktographie sollte verlassen werden, und daher wurde vorgeschlagen, mit dem Unterricht von geschichtlichen Ereignissen anzufangen, die die dem Wohnort des Kindes topographisch nahen Gebiete betrafen, damit ein solches Lernen für das Kind einen inneren Wert hatte und der Schüler auf diese Weise motiviert wurde.

Ein bedeutendes Thema war die Frage der Selbständigkeit und der Selbsttätigkeit des Kindes im Unterricht. Das Prinzip der Selbsttätigkeit der Jugend als eine selbstständige Tätigkeit des Schülers im Unterrichtsprozess wurde als Gegensatz zu dem das Gedächtnis überfordernden mechanischen Lernen gestellt, das weder den Geist noch selbstständiges Denken entwickelt. Das finden wir zum Beispiel in der Lehrerzeitschrift «Beseda učitelská» 1871 belegt:

Ein Fortschritt ist, wenn anstatt von einer Überforderung durch viele Fächer, die das Kind der Selbstständigkeit des Geistes beraubt und zu einem bloßen Automaten macht, wir der Jugend den Zauber der Selbsttätigkeit und die Liebe zur weiteren Bildung geben, wenn die Schulen fürs Leben unterrichten¹⁷.

Den Lehrern wurde seitens der Lehrerrepräsentanz weiter empfohlen, eng mit den Ärzten zusammenzuarbeiten, um eine gesunde Körper- und Geistesentwicklung des Kindes zu ermöglichen. Der Lehrer und Arzt sowie die Eltern sollten im engen Kontakt sein, um eine gesunde Entwicklung des

¹⁵ F.O. Schmitt, *O metodách učebných*, «Komenský», n. 4, 1880, pp. 51-54.

¹⁶ František Zoubek (1832-1890) war aktiver Mittelschullehrer von Tschechisch und Alt Sprachen und Geschichte. Er war sehr aktiv in den Lehrervereinen in siebzigen und achtzig Jahren des 19. Jahrhunderts. Ausserdem war er sehr aktiv sowohl in den Übersetzungen von Comenius ins Tschechische, als auch in den Interpretationen seines Werkes.

¹⁷ *Jak se může mládež vychovávat k samostatnosti*, «Beseda učitelská», n. 42, 1871, pp. 497-500, besonders 497.

Kindes im Geiste der damaligen Anthropologie zu unterstützen¹⁸. Der Lehrer sollte nicht nur auf die gesunde Entwicklung des Geistes, sondern auch des Körpers achten: «Es ist die Aufgabe der Lehrerschaft sich dafür einzusetzen, dass die Jugend fähig wäre, den Kampf um ein gesicherteres Leben einzugehen, jedoch zum Kampf, dessen Waffen das Wissen und die Kunst darstellen, gehört neben der geistigen Kraft auch die körperliche, die erstere bedingende Kraft – die Gesundheit»¹⁹. Die Gesundheit sollte in der Schule durch den Aufbau und die Gründung von hygienischeren Schulen mit größeren Räumen unterstützt werden, die weniger mit Möbeln ausgestattet oder überfüllt und gut gelüftet sein sollten²⁰. Der Unterricht sollte die Schüler nicht geistig überfordern²¹, er sollte verkürzt werden, damit das Kind neben dem Weg zur Schule und des eigentlichen Unterrichts auch die Zeit für die Erholung hätte:

Wenn eine ununterbrochene und anstrengende geistige Arbeit einem körperlich und geistig entwickelten Erwachsenen nachweisbar schädlich ist, um so mehr muss sie dem Kinde schädlich sein. Bei der geistigen Arbeit wird am meisten das Gehirn angestrengt, und da sich dieses beim Kinde erst entwickelt, liegt es auf der Hand, dass es früher einer Ermattung unterliegt, und zwar je mehr, desto weniger entwickelt es ist. [...] Dass bei einer derartigen Überforderung der geistigen Kräfte des Kindes, dem für ein lautes Lernen nur kaum Zeit für die Erholung übrig bleibt, sich weder das Gehirn, noch der Körper ordentlich entwickeln kann, ist offensichtlich. Ist nicht ein solches Lernen eher ein Quälen? Wird hier nicht einer freien Entwicklung der geistigen Kräfte des Kindes Gewalt angetan?²²

Auch die übermäßige Sitzerei beim langen Unterricht wurde kritisiert. Diese ungesunde Schullebensweise sollte nach der damaligen Diskussion die körperliche Entwicklung ernst beeinträchtigen²³, zu Sinnesstörungen, zur Entstehung von Krankheiten, sogar zum Tode des Kindes führen:

In der falschen Konstruktion der Schulbänke liegt, wie die berühmten Ärzte Bardeleben, Küchenmeister, Remark, Virchow u. a. bewiesen haben, die große Ursache vieler Erkrankungen von Augen und Wirbelsäule sowie von Bauch- und Brustleiden. [...] Daher ist die heilige Pflicht aller Behörden, denen es an der Gesundheit der Schuljugend und später auch an einem gesunden, starken und widerstandsfähigen Volk liegt, zuzusehen, dass die Schulbänke der Gestalt, dem Alter und dem Geschlecht angemessen konstruiert werden²⁴.

¹⁸ K.S. Amerling, *Vzájemnost žádoucí mezi učiteli, rodiči a lékaři*, «Beseda učitelská», n. 39, 1872, pp. 457-460.

¹⁹ *Úloha zdravotnictví v oboru školství*, «Beseda učitelská», n. 48, 1872, pp. 565-567, 565.

²⁰ *Pečujeme o zdravý vzduch ve škole*, «Beseda učitelská», n. 46, 1874, pp. 545-546.

²¹ *Přetížení mládeže školní*, «Posel z Budče», n. 11, 1876, pp. 169-171.

²² J. Drahoňovský, *Nepřetěžujme mládež již v útlém věku!*, «Beseda učitelská», n. 20, 1883, pp. 278-279.

²³ E.O. Kusý, *O vychovávání s bledišť životoskumného a zdravotního*, «Komenský», n. 39, 1876, pp. 193-196.

²⁴ *O působení učitele v příčině zdravotnictví ve škole i mimo školu*, «Beseda učitelská», n. 47, 1877, pp. 597-599, 597.

Schuld an der ungesunden Entwicklung waren jedoch nicht nur die materiellen Gegebenheiten der Schule, sondern auch der innere Gang, die Struktur der Fächer, die das Gedächtnis überfordernde Lernweise usw.:

Nicht minder wichtig ist ein dem Alter und der Aufnahmefähigkeit der Schüler angepasster Unterricht, und zwar aus dem Grunde, dass die Entwicklung des Geistes und des Körpers einander nicht beeinträchtigen, und dass infolgedessen beide nicht unentwickelt steckenbleiben oder zur Erkrankung führen. Es wird den Gesundheitsforderungen nicht gerecht sein, wenn die Schüler, ohne Berücksichtigung des Einzelnen wie verschiedene Waren in einem Sack, hier und da täglich 6-7 Stunden und manchmal sogar länger im Klassenzimmer verbringen müssen, und in dieser Zeit unterschiedliche Fächer nacheinander fast rasend behandelt werden²⁵.

Eine wichtige Unterstützung der gesunden Entwicklung des Schülers sollte die Einführung von Sportunterricht als einem Unterrichtsfach werden. Der wurde in 1870 zum Pflichtfach, wenigstens für die Jungen. In der Diskussion über die Bedeutung körperlicher Bewegung für die gesunde Entwicklung des Schülers wird allerdings betont, dass es sich nicht um eine weitere Überforderung des Einzelnen, diesmal im körperlichen, nicht im geistigen Bereich, handelt. Die körperlichen Übungen sollten nicht ein Zweck, sondern ein Mittel sein, und daher sollten sie den körperlichen Möglichkeiten und Fähigkeiten des Schülers entsprechen²⁶. Auf eine allseitige und ebenmäßige Entwicklung des Körpers, nicht eine Überlastung von den einzelnen Körperteilen, wurde Akzent gelegt²⁷.

Für die gesunde Entwicklung des Kindes wurde nicht nur die körperliche Bewegung, sondern auch die körperliche Arbeit empfohlen. Diese sollte beim Kinde die Erholung des Geistes nach einer geistigen Arbeit anregen und auf diese Weise einen Ausgleich zwischen geistiger und körperlicher Anstrengung darstellen. Sport sollte von Lehrern unterrichtet werden, die der körperlichen Entwicklung und der Grundsätze des körperlichen Lebens kundig waren²⁸. Das führte zur Hervorhebung von Anthropologie und Biologie in der Lehrerausbildung. Die Betrachtung des Kindes wurde in der damaligen Zeit wesentlich nicht nur durch die Fragen der sittlichen, geistigen und gedanklichen Entwicklung, sondern durch die Grundsätze der körperlichen Entwicklung, geprägt.

Unter dem Begriff einer gesunden Erziehung verstand man seit den 80er Jahren des 19. Jahrhunderts den ständigen Wechsel zwischen der intellektuellen und körperlichen Anstrengung, häufige Bewegung im Freien, genügende körperliche Bewegung, Abhärtung, Pflege der Gewohnheiten im Bereich von gesunder

²⁵ *Myšlenky o zdravotnictví v oboru školském*, «Beseda učitelská», n. 37, 1874, pp. 433-435, 434.

²⁶ *Dbejme tělocviku*, «Komenský», n. 24, 1873, pp. 381-383 and *Dbejme tělocviku*, «Komenský», n. 25, 1873, pp. 397-399.

²⁷ F.V. Kodým, *Tělocvik, jeho vznik a vývoj*, «Beseda učitelská», n. 10, 1883, pp. 135-137.

²⁸ *Tělocvik na školách obecných*, «Komenský», n. 24, 1877, pp. 369-370.

Ernährung. Den Kindern wird die Bewegung im Freien empfohlen, in den Vordergrund rückt das Schwimmen und Baden im Fluss, später im Stadtbad²⁹. Zusammenfassend kann man sagen, dass die medizinische Diskussion über die gesunde Entwicklung des Kindes keine Domäne der medizinischen Zeitschriften blieb, sondern dass sie wesentlich die pädagogische Diskussion bereicherte und beeinflusste und in mancher Hinsicht zur Basis von reformorientierten pädagogischen Prinzipien wurde.

Es ist offensichtlich, dass die damalige Reformdiskussion manche Themen enthält, die sich später kristallisieren und lauter oder schärfer in der reformpädagogischen Diskussion am Anfang des 20. Jahrhunderts erklingen. Dennoch sind auch markante Inhalts- und Strukturunterschiede zwischen den beiden Diskussionen zu beobachten. Die pädagogische Orientierung auf das Kind und die Betonung der Freiheit des Schülers sind im letzten Drittel des 19. Jahrhunderts nicht so intensiv, wie bei den Pädagogen am Anfang des 20. Jahrhunderts.

Der Lehrer als Retter der Nation

Analysiert man die nationale Emanzipation, muss man die Aufmerksamkeit auf den bedeutenden tschechischen nationalen Schutzverein der Lehrerschaft lenken, auf den tschechischen Zentralschulverein, der am Ende des Jahres 1880 ins Leben gerufen wurde. Seine Gründung ist als Ausgang der Nationalbestrebungen der tschechischen Lehrerschaft – vor allem aus den Volks- und Bürgerschulen – und der breiteren gesellschaftlich-kulturellen Repräsentation und als Reaktion auf die Entstehung eines ähnlichen deutschösterreichischen Schulvereines (*Deutscher Schulverein*, gegründet Juli 1880 in Wien) zu sehen.

Die Ziele der oben genannten Schutz- und Schulvereine waren ähnlich. Wie die ersten angenommenen Satzungen des tschechischen Zentralschulvereines vom Dezember 1880 zeigen, setzte sich der Verein folgendes Ziel: «Der Zweck des tschechischen Zentralschulvereines ist, in den österreichischen Ländern die Volksschulen und Kinderbewahranstalten mit der tschechischen Unterrichtssprache zu errichten, sie zu erhalten, und das vor allem in solchen Gemeinden, wo die Errichtung der Volksschule oder der Bewahranstalt für die tschechischen Kinder nicht durch öffentliche Kosten zu erreichen ist»³⁰. Mitglieder des tschechischen Zentralschulvereines waren sowohl Volksschullehrer, als auch in großem Maße Journalisten, Hochschulstudenten

²⁹ *Slovo o koupání se mládeže pražské v řece*, «Beseda učitelská», n. 27, 1879, pp. 318.

³⁰ Národní archiv Praha. Fond Ústřední matice školská, Karton 59.

und Vertreter des böhmischen nationalen öffentlichen und wirtschaftlichen Lebens³¹. Das Vereinsvermögen bildeten zum größten Teil kleine Spenden und regelmäßige Mitgliedsbeiträge.

Ähnliche Ziele verfolgt auch der *Deutsche Schulverein*, dessen Gründung am 2. Juli 1880 im Saal der Wiener Akademie der Wissenschaften als eine der bedeuten Erfolge der deutschen nationalen Bewegung und der völkischen Diskussion zu betrachten ist³². In seinen Gründungssätzen liest man: «Der Deutsche Schulverein hat in Österreich zum Ziel, in den Gemeinden mit der sprachlich gemischten Bevölkerung, besonders an der Sprachgrenze und auf den Sprachinseln die Bemühungen um Erhaltung und Entwicklung des Schulwesens zu unterstützen, wo es nicht auf Kosten der Staatskasse gemacht werden kann»³³. Der Verein hatte 3 500 gründende Mitglieder und am Ende des Gründungsjahres zählte ihre Anzahl 22 000. Er wurde früh zum größten deutschösterreichischen Schutz- und Schulverein. 1886 kommt es zur ersten Krise in dem österreichischen Verein. Aus ihm tritt nach den Konflikten mit der Leitung eine markante nationalistisch orientierte Persönlichkeit des österreichischen öffentlichen und später auch des politischen Lebens aus. Es ist Georg von Schönerer³⁴. Er verließ den Verein, nachdem die Vereinsführung die Satzungen nicht in dem Sinne verändern wollte, dass das Vereinsmitglied durch die örtliche Organisation ausgeschlossen werden könnte. Dieses wollte Schönerer erreichen und vor allem seine radikal-nationalistischen Anhänger aus den Reihen der Hochschulstudenten. Sie wollten damit die Möglichkeit erreichen, auf Lokalebene die Zusammensetzung der Mitgliederbasis zu regulieren bzw. die Mitglieder jüdischer Herkunft ausschließen zu können.

³¹ In den ersten zehn Jahren stand an der Spitze des Vereines bedeutender führender Politiker des konservativen Flügels der tschechischen Politik František Rieger (1818-1903). Im Jahre 1890 wurde auf die Spitze des Zentralschulverbandes Jaroslav Čelakovský gesetzt.

³² Die Sprach- und Nationalbestrebungen der konservativen und mit den slawischen Völkern zusammenarbeitenden Regierung von Taaffe und die tschechischen Bestrebungen, weitere tschechische Gymnasien in Böhmen und Mähren und auch tschechische Volksschulen in Wien zu gründen, hatten die unmittelbare Gründung des *Deutschen Schulvereins* zu Folge. Der Verein hatte seinen Sitz in Wien, seine Tätigkeit war jedoch nicht nur auf die österreichischen Länder beschränkt, sondern auch auf die deutsch besiedelten Gebiete in den böhmischen Ländern, in dem damaligen Ungarn, in dem heutigen Slowenien oder Italien. Es handelte sich dabei nicht um eine ausschließlich österreichische Angelegenheit. Ein ähnlich orientierter Verein entsteht im Jahre 1881 im Deutschen Reich unter dem Namen *Allgemeiner Deutscher Schulverein in Deutschland*. Dieser Verein unterstützte finanziell als auch ideologisch die Schwesterinstitution in Wien, aber nicht nur sie.

³³ G. Weidenfeller, *Verein für das Deutschtum im Ausland. Allgemeiner Deutscher Schulverein (1881-1918)*, Frankfurt am Main [etc.], Peter Lang, 1976, pp. 112-113.

³⁴ Georg Heinrich Ritter von Schönerer (1842-1921) war einflussreicher nationalistischer und antisemitischer Politiker in Österreich. Nach 1879 gründete er die völkisch-antisemitische Deutschnationale Bewegung (Alldeutschen), die auch im Reichsrat vertreten war. Er war grosser Gegner des österreichischen Liberalismus, Patritismus, Katholizismus. Dagegen kämpfte er für die Verteidigung der grossdeutschen Lösung – der Auflösung der Monarchie und den Abschluss ihrer westlichen Teile an das Deutsche Reich.

Nach der Nichtdurchsetzung der Änderung tritt nicht nur Schönerer selbst, sondern auch viele andere Mitglieder, vor allem Hochschulstudenten aus. Schönerer gründet einen neuen radikal-nationalistischen und antisemitischen Verein, den *Schulverein für Deutsche*, der nach seiner dreijährigen Existenz durch die österreichischen Behörden verboten wurde.

Richten wir nun unser Augenmerk auf eine allgemeine Auffassung der Formierung einer nationalen bürgerlichen tschechischen Gesellschaft in den böhmischen Ländern, um den volksschützenden Aktivitäten der Schulvereine einen plastischeren Rahmen setzen zu können.

Nach der Niederlage gegen Preußen im Jahre 1866 und nach der Auflösung des Deutschen Bundes verlieren die Deutschösterreicher das bisherige kulturelle, sprachliche und politische Hinterland. In den böhmischen Ländern, die ein Bestandteil von Österreich-Ungarn sind, werden sie nun zur ethnischen Minderheit. Sie bestimmen und beherrschen zwar immer noch die Ausrichtung der Monarchie, trotzdem haben sie ein Gefühl der Verunsicherung und Bedrohung durch die stärkenden nationalen Forderungen und Erfolge der nicht-deutschen Völker in der Monarchie – vor allem der Tschechen, und zwar sowohl auf bürgerlich-gesellschaftlicher als auch auf politischer Ebene. Nach der Niederlage gegen Preußen ist offensichtlich, dass sich Kaiser Franz Joseph I. entscheiden muss, ob er das Reich auch weiterhin zentralistisch verwalten oder das Modell der Föderation oder des Dualismus annehmen wird. Im Jahre 1867 entsteht Österreich-Ungarn, was eine große Enttäuschung für die tschechische politische Elite sowie eine Ernüchterung für die Vertreter der tschechischen Lehrerschaft ist. Diese war wahrscheinlich nicht in der Lage, alle Positiva einzuschätzen, die ihr die erste nicht oktroyierte, die so genannte Dezember-Verfassung aus dem Jahre 1867 brachte. Der Komplex aus bürgerlichen Rechten und Freiheiten, der bürgerliche Gleichheit und Freiheit, Gleichheit vor dem Gesetz, Bekenntnis- und Gewissensfreiheit, Forschungsfreiheit, Petitions- und Vereinsrecht, Versammlungsfreiheit sowie Recht auf die Pflege der Nationalsprache garantierte, wurde in den Augen der tschechischen Lehrerschaft von der Nichterfüllung des tschechischen Nationalprogramms und der tschechischen staatsrechtlichen Forderungen überschattet. Die Tätigkeit der Berufs- und Schutzvereine – einschließlich der Schulvereine – sollte nun die Erfüllung dieser Forderungen unterstützen. Vor allem die Volksschullehrer, die Volksschaubildner und die Träger der nationalen Aufklärungstätigkeit sowie die führenden Akteure der Sport- und Kulturvereine sollten den Prozess der nationalen Selbstbestimmung, des nationalen Selbstbewusstseins und der Formierung der nationalen Gemeinschaft aktiv unterstützen.

In diesem Zusammenhang stellt sich eine wichtige Frage. Wie sollte man die Tätigkeit und die Rolle der Lehrervereine, Lehrerverbände, der Schulvereine (die so genannten «mace») und Ausbildungs-, Erziehungs- und Sozialschutzvereine deuten? Was sollte man sich unter dem Begriff Schutzverein vorstellen? Wen

und wovor sollte er beschützen beziehungsweise war es wirklich notwendig, jemanden zu beschützen? Mit diesen Fragen gelangen wir jedoch an den eigentlichen Kern des Prozesses der Formierung der modernen – nicht nur tschechischen – Nation.

Der Ausdruck Schutzverein ruft die Vorstellung hervor, dass die Welt in zwei Gruppen aufgeteilt ist, in diejenigen, die zu beschützen sind, und diejenigen, die die anderen angreifen könnten. Eine Volksgruppe sollte vor der Entnationalisierung geschützt werden, ein Volk wird vor dem Verlust des nationalen «Raumes» gewarnt, zu dem es aufgrund der erfolgreichen Assimilation, Migration der Bevölkerung oder Beherrschung durch ein Konkurrenzvolk kommen könnte. Der Schutz soll sowohl zum Wiedererwerb der verlorenen nationalen Identität als auch zu deren weiteren Entfaltung führen. Daher ist die Frage berechtigt, ob die umfangreiche Tätigkeit der nationalen Schutzinstitutionen der 80er Jahre des 19. Jahrhunderts nicht eher eine Ankurbelung und Unterstützung der Nationalisierungsprozesse anstrebt als den Schutz der bereits bestehenden Nationen³⁵. Im Geiste von Gelters³⁶ Volks- und Nationalismus-Theorie könnte man den Eindruck haben, dass sich gerade die Akteure der nationalen Schutzvereine am meisten um die Formierung des Volkes einsetzen, auch wenn sie von dessen Schutz sprechen. Es fragt sich, ob man hier nicht etwas Imaginäres voraussetzt, was jedoch noch nicht real vorhanden ist. Pieter Judson drückt dies zugespitzt folgendermaßen aus:

Zwar gab es um 1900 viele nationalistisch argumentierende politische Parteien, nationalistische Diskurse, Medien, Aktivisten und Aktivistinnen, aber es gab selbst in den westlichen Kronländern der Habsburgermonarchie noch keine Nationen im modernen Sinn. Die Nation funktionierte eher als diskursives Konstrukt, als gelegentliches Ereignis, als wissenschaftliche, politische oder statistische Kategorie. Die abstrakte Kategorie 'Nation' blieb dabei sehr oft eine Abstraktion, vor allem auf dem Lande³⁷.

In diesem Sinne fügt der Autor hinzu: «Der Schutzverein schützte die Nation nicht in ihrem Bestand, sondern arbeitete daran, die noch nicht existierende Nation erst zu verwirklichen, im Alltag zu verankern und als Norm durchzusetzen»³⁸.

³⁵ P. Haslinger, *Wen und wovor schützen Schutzvereine? Problemaufriss und Versuch einer Einordnung*, in Id. (ed.), *Schutzvereine in Osmittleuropa*, Marburg, Verlag Herder Institut, 2009, pp. 5-7.

³⁶ Ernest Gellner (1925-1995): Anthropologe, Soziologe und Philosoph. Aufgewachsen ist er in einer deutschsprachigen jüdischen Intellektuellenfamilie in Prag, die im Jahr 1938 vor Hitler aus Prag nach England floh. Gellner wurde Professor an der London School of Economics and Political Science, später ordentlicher Professor in Cambridge. Nach 1993 ging er an die Central European University nach Prag. In Prag ist er im Jahre 1995 gestorben. Seine Nationaltheorie stellte er vor allem in *Nations and Nationalism* (Oxford-New York, Oxford University Press, 1983) vor.

³⁷ P. Judson, *Schutzvereine und das Grenzland: Strategien zur Verwirklichung von imagined borderlands*, in P. Haslinger (ed.), *Schutzvereine in Osmittleuropa*, Marburg, Verlag Herder Institut, 2009, pp. 7-19, besonders p. 7.

³⁸ *Ibid.*, p. 8.

Einige nationale Führer sollten national wenig bewusste Gruppen auswählen und bei ihnen die nationalen Werte popularisieren und die Mitglieder dieser Gruppe zur Selbstidentifizierung mit den aufgenötigten Vorstellungen vom Volk und Volksleben bringen. Die Vereine sollten also nicht die Nation beschützen, sondern der Idee dieser Nation neue Anhänger gewinnen – die Mitglieder der nationalen Gruppierung, die sich bisher als national-indifferent zeigten.

Man muss jedoch fragen, wie häufig die eigentlichen nationalen Agitationen des tschechischen Zentralschulvereins bzw. des Deutschen Schulvereines gegenüber der indifferenten Bevölkerung waren, ob Schulen in Örtlichkeiten gegründet wurden, die die Vereine bestimmt haben, oder ob es sich um Schulgründungen in Örtlichkeiten handelte, aus denen ein Gesuch seitens der Eltern, Lehrer oder anderer Personen kam. Wir fragen, wie die Rhetorik gegen den nationalen Konkurrenten strukturiert und eingefärbt war, wie aktiv verschiedene Broschüren zur nationalen Aufgabe und zur nationalen Lage der Tschechen bzw. der Deutschösterreicher verfasst wurden. Die Analyse der tschechischen Primärquellen – vor allem der Protokolle der Vollversammlung und Protokolle des Ausschusses sowie des Anzeigers des Zentralschulvereins³⁹ – ergab, dass die überwiegende Mehrheit der Schulen in Örtlichkeiten gegründet wurde, die nicht von dem Zentralschulverein ausgewählt worden waren. Darüber hinaus wurde eine Schule nicht immer dann gegründet, wenn der Zentralschulverein darum ersucht wurde. Häufig haben mangelhafte finanzielle Möglichkeiten des Schulvereins die Gründung unmöglich gemacht, auch eine national neutrale Einstellung kann jedoch der Grund gewesen sein. Bemerkenswert ist, dass es sich bei der Analyse der Vereinsperiodika und der Vereinsjahresberichte zeigt, dass das Hauptinteresse nicht dem Beobachten gehörte, was im Deutschen Schulverein und in der Arbeit der deutschen Lehrerschaft passiert, sondern der «Aufbauarbeit» im tschechischen Lager. Es entsteht so ein Bild, als ob der tschechische Zentralschulverein überhaupt keinen Gegner hatte und eher alle seine Kräfte für «konstruktive Arbeit» beim Aufbauen eigener Nation widmete. Wir erfahren fast keine Informationen über die Situation der deutschen Schulen in den böhmischen Ländern, sogar kommt nicht so häufig das Jammern über die komplizierte Situation beim Gründungsprozesses einer tschechischen Schule wegen den Verhinderungsarbeiten der deutschen Gemeinschaft in der Gemeinde vor.

Betrachtet man die deutschösterreichische Debatte im Deutschen Schulverein⁴⁰, zeigt sich ein anderes Bild. Die Rhetorik war viel mehr aggressiver und auf

³⁹ Die Primärquellen zum tschechischen Zentralschulverein befinden sich im Nationalarchiv in Prag. Fond 690 Ústřední matice školská. Kartons 59-60 und 67-77 beziehen sich auf die Zeitspanne des letzten Drittel des 19. Jahrhunderts. Auf diesen Primärquellen beruht die oben angegebene Analyse der Tätigkeit des tschechischen Zentralschulvereines.

⁴⁰ Die Primärquellen zum Deutschen Schulverein befinden sich im Österreichischen Staatsarchiv in Wien. Fond Deutscher Schulverein 1880-1945. Sig. AT-OeStA/AVA Unterricht Deutscher Schulverein 1880-1945. Vor allem die Kartons 8-15 beziehen sich auf die Tätigkeit des

den tschechischen Konkurrenten bezogen. Das Archivfond vom Deutschen Schulverein zeigt sehr häufig das Bild aus, als die Schulvereinstellen und die deutschen Gemeinden in böhmischen Ländern alle mögliche Obstruktionen ausgenützt haben, um zu verhindern, eine tschechische öffentliche oder private Volksschule im überwiegend deutschen Ort gründen zu lassen, auch wenn die gesetzlichen Maßnahmen für die Gründung erfüllt wurden. Dabei muss betont werden, dass sich die tschechischen Eltern in ihrer Sache meisten bis an Höchstes Gericht in Wien gerufen haben und meistens auch den Streit gewonnen haben. Die Gründung der Volksschule mit der tschechischen Unterrichtssprache zog sich jedoch auf dieser Weise jahrelang. Trotzdem verzeichnet man nur sehr wenig im Deutschen Schulverein ein sich Befinden mit der neuen Situation, die das Nationalrecht für alle «gleich» in der Monarchie sichern wollte. Stattdessen radikalisierte sich die nationale Diskussion im Deutschen Schulverein und die «tschechischen Erfolge» wurden als Beweis der Bedrohung der deutschen Kultur und des Schulwesens in den böhmischen Ländern gelesen.

Eins der Resultate der nationalen Lehrerdiskussion war die Erstellung und Veröffentlichung nationaler Landkarten, die die nationale Lage kodifizieren und das nationale Konzept lokalisieren sollten. In beiden nationalen Lagern wurden ganze Reihen von Landkarten mit markierten Sprachenklaven, Sprachinseln, Sprachgrenzen etc. herausgegeben. Die national ausgerichtete Wortwahl und die territoriale Geographie näherten sich allmählich an. Im Jahre 1883 wurde nach dem deutschösterreichischen Muster eine statistische Abteilung des tschechischen Zentralschulvereins eingerichtet. Deren Ziel war neben der Kontrolle der Mitgliederanzahl und der Zahlung der Mitgliedsbeiträge auch die Erfassung der Einwohnerzahlen an der Sprachgrenze.

Im Prozess der nationalen Selbstbestimmung spielte eine wesentliche Rolle auch die schnell steigende Bedeutung von Zeitungen, Zeitschriften sowie Kalendern, Nationalbroschüren, patriotischen Romanen, Dorfromanen. Ebenfalls die Herausgabe der Schulvereinskalender und – ansichtskarten sowie die Veranstaltung von verschiedenartigen Konzerten, Ausstellungen, Besprechungen und sogar Gebrauchtwarenhandlungen geschah zu Gunsten des tschechischen Zentralschulvereins. In Lehrerpublikationen sowie Zeitschriften und Kalendern wurden Auskünfte über Sendung und Tätigkeit des tschechischen Zentralschulvereins bzw. des Deutschen Schulvereins veröffentlicht. Die Auskünfte über den tschechischen Zentralschulverein sollten nicht nur in der tschechischen, sondern auch in der polnischen, russischen, bulgarischen, serbischen, kroatischen und slowenischen Presse veröffentlicht werden. Ebenfalls die deutschen Lehrerperiodika in Deutschland und in den deutschen Gebieten in Europa informierten fleißig über die deutsche Schutzarbeit (später über die Grenzlandarbeit) des Deutschen Schulvereins.

Deutschen Schulvereins in den böhmischen Ländern. Die oben angegebene Analyse der Tätigkeit des Deutschen Schulvereins beruht auf diesen Primärquellen.

Die Schutztätigkeit sollte sich nicht nur auf die Unterstützung der Gründung von Kindergärten und Schulen, deren Gebäude zum handfesten Sinnbild der nationalen Tätigkeit in gemischten Gebieten wurden, sondern auch auf materielle Hilfe orientieren. Die Schutzvereine boten zum Beispiel Unterstützung bei der Migration und bei den Niederlassungen der sprachlichen Minderheit in gemischten Gebieten, sie halfen durch den Einkauf des Bodens oder Eigentums, sie boten Beistand in Not oder bei der Suche nach einer Stelle. Auch die Entfaltung der Wandervereine brachte nicht nur die Tendenz zu einer gesunden Lebensweise und der Pflege des Körpers mit sich. Das Interesse an der physischen Bezwingung der Naturschönheiten führte zugleich zum Erleben der nationalen Kultur und Traditionen, die auf dem Lande noch auf eine natürliche Weise anwesend und bewahrt wurden. Das Land diente nicht nur als Erlebniszentrum, sondern auch als Gegenstand des fachkundigen Studiums der sich neu konstituierenden Heimatkunde und Ethnologie bzw. der Volksbildung.

Man braucht kein scharfer Kritiker der Konstruktionstheorie der Nation zu sein, um angesichts dieser Tatsachen verunsichert zu werden. Soll man die aufklärerische, nationale Tätigkeit aller Schutzvereine, Berufsvereine wirklich als eine nationale Rivalität oder als einen nationalen Kampf verstehen? Soll man sich damit abfinden, dass die Schutzvereine nur eine Verkörperung von Ambitionen der nationalen Agitatoren waren, die sich bei der Nationalisierung der Gesellschaft nicht weigerten, zur Erreichung des eigenen Ziels verschiedenartige Praktiken anzuwenden, darunter auch solche, die den nationalen Gegner in die Rolle des Feindes stellten und ihn negierten, sei es durch Missachtung, Vertreibung oder etwas Ähnliches?

Ich nehme an, dass es irreführend wäre, wenn wir die Schuldiskussion isoliert ohne den breiteren gesellschaftlichen Kontext analysieren würden, der einen erklärenden Rahmen bieten kann. Die Vereine und Schutzorganisationen bilden einen Bestandteil des spezifischen Prozesses der Nationalisierung der modernen Gesellschaft und der Formierung der modernen bürgerlichen Gesellschaft. Trotzdem dürfen wir die Dynamik und Struktur dieser Prozesse nicht mit Hilfe eines einheitlichen Interpretationskonzepts erklären, das die Tätigkeit sowohl der böhmischen als auch der deutsch-österreichischen Vereine und den Einfluss der reichsdeutschen und der jüdischen Schutzvereine erklären und deuten würde. Die Berufs- und Schutzvereine sind ein Resultat einer vielschichtigen politischen und gesellschaftlichen Lage in der Monarchie nach den 80er Jahren des 18. Jahrhunderts, und aufgrund dessen lassen sie sich nicht in universelle Deutungsrahmen hineinzwängen. Die in den Vereinen geführte Diskussion ist hinsichtlich der politischen, wirtschaftlichen, sozialen Stellung sowohl der führenden Vertreter als auch ihres Publikums spezifisch. Sie passt sich der Ausdrucks- und Verständnismöglichkeiten des jeweiligen Publikums an, auf das sie sich orientiert. Analysieren wir die Sprache, die Kodes, die Normen, die Kategorien, die in einzelnen nationalen Gruppierungen angewandt, durchgesetzt und protegiert wurden, dann erfahren wir, dass auch trotz dem

gemeinsamen Ziel, der Stärkung und Formierung des nationalen Bewusstseins, unterschiedliche diskursive Methoden, Praktiken eingesetzt wurden. Wir können die Tätigkeit der tschechischen und deutschen Berufsgruppen und Schutzvereine nicht aufgrund eines einheitlichen erklärenden Rahmens deuten, wir können ihre Tätigkeit nicht anhand desselben Paradigmas interpretieren, gleichgültig, ob es sich um ihre Tätigkeit am Ende des 19. Jahrhunderts, vor dem Ausbruch des 1. Weltkriegs oder nach der Herausbildung von Nachfolgestaaten nach dem Zerfall von Österreich-Ungarn nach 1918 handelt. Wir würden zum Einen grobe Vereinfachungen begehen, zum Anderen immer die gleichen Feststellungen wiederholen, die jedoch die Bewegung im Diskurs nicht berücksichtigen würden.

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From the Enlightenment to Philanthropinism in the pedagogical thought of the Romanians from Transylvania, the Banat and Hungary (1776-1848)*

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ABSTRACT: This study aims to analyse the reception of the Philanthropinist pedagogical current among the Romanians from the Austrian monarchy. Alongside the pedagogy of the *Aufklärung*, Philanthropinism was one of the pedagogical concepts that substantially influenced the educational thought and literature among the Romanians from Transylvania, the Banat and Hungary at the beginning of the nineteenth century. Its dissemination in the pedagogical thought of Transylvania occurred *via* German Neo-Humanism, in an extremely responsive cultural-ideological climate, prepared by the philosophy of the *Aufklärung*. The reception of Philanthropinism was translated into a considerable number of pedagogical writings, of prevalently German inspiration, contributing to the emergence of pedagogy as an autonomous discipline and defining and upholding an open outlook on education. This outlook evolved over the course of a century, from a pragmatic, utilitarian perspective on schools to a comprehensive vision of the role and the need to improve man through education and culture. Developed by the generation of the Enlightenment, this concept set the rationalist, moral and religious foundations of education in accordance with the European vision and spirit of the time, illustrating thus the fact that the Romanian intelligentsia assimilated the Enlightenment ideology in this domain too. Progressively formulated, the culturalising perspective became definitively entrenched in the first half of the nineteenth century, when there occurred a visible phenomenon of translation from the individual to the community, from education through school to education through culture, conceived in a national sense.

EET/TEE KEYWORDS: Philosophy of Education; Philanthropinism; Pedagogical Theory; Educational Method; Educational Innovation; Transylvania; Romania; XIX Century.

* The text has been translated into English by Carmen-Veronica Borbely.

In 1818, the printing press of the University of Buda published a pedagogy manual in Romanian, entitled *Manuductorul pentru învățătorii scholasticești* ('Manuductor for Scholastic Teachers')¹. This was actually a collection of pedagogical studies, translated from several sources, especially from the works of August Hermann Niemeyer². Conceived as a compendium of pedagogy, this publication summarised the main theoretical lines of eighteenth-century pedagogical thought, using an interesting theoretical support, which was mainly entrenched in Philanthropinism³. This renders the *Manuductor* as the first and most illustrative evidence of the Romanians' reception of Philanthropinism in the Austrian Empire⁴.

Of course, its reception in the Romanian space was not an unprecedented phenomenon, even though it has been insufficiently recuperated thus far. It was part of a broad, reverberating movement, which, in the spirit of the *Aufklärung*, also characterised Philanthropinist pedagogy, helping to disseminate its pedagogical ideas and concepts beyond the political and territorial boundaries of the German world. Among the territories 'conquered' by the 'new pedagogy'

¹ *Manuductorul pentru învățătorii scholasticești* [Manuductor for Scholastic Teachers], Buda, 1818, in D. Iarcu (ed.), *Repertoriu cronologic sau Catalog general de cărțile române imprimate de la adoptarea imprimeriei, jumătate secolu XVI și până astăzi. 1550-1865 exclusiv* [Chronological Repertoire or General Catalogue of Romanian Books Printed since the Adoption of the Printing Press, from the Mid-Sixteenth Century until Today. 1550-1865 Exclusively], Bucharest, Imprimeria statului, 1865, p. 30.

² D. Ghișe, P. Teodor, *Fragmentarium iluminist* [Illuminist Fragmentarium], Cluj-Napoca, Dacia, 1972, p. 239; N. Bocșan, *Luminile și pașoptimul* [The Enlightenment and the 1848 Revolution] in I.A. Pop, T. Năgler, M. András (edd.), *Istoria Transilvaniei* [History of Transylvania], 3 vols., Cluj-Napoca, Academia Română-Centrul de Studii Transilvane, 2008, Vol. III, p. 134. For August Hermann Niemeyer's conception and work, see G. Landsheere, *August Hermann Niemeyer 1754-1828*, «Prospects: the quarterly review of comparative education», vol. 28, n. 3, September 1998, pp. 509-524.

³ Philanthropinism: a pedagogical current that appeared in the German world in the second half of the eighteenth century. Its founder was Johann Bernard Basedow (1724-1790), who was then joined by other representatives, such as Wolke, Simon, Schiveighäuser, Campe, Trapp, Olivier, Salzmann, Gutmuths, Bahrdt, and Zschokke, who laid the foundations of the so-called Philanthropinist School. In terms of its pedagogical orientation, Philanthropinism was visibly influenced by Rousseauian pedagogy, as illustrated in *Emile*, aiming to promote an education system that would give the community responsible, useful and happy citizens. As for the methods proposed, Philanthropinism advocated: the cultivation of reason against the mechanical memorising of knowledge; an attractive educational system based on direct contact with things and knowledge; the replacement of discipline that was grounded on fear and punishment with a reward-based discipline; and a greater emphasis on physical education, seen in direct consonance with the education of the mind. See Loïc Chalmel, *Reseaux philanthropinistes et pédagogie au 18e siècle*, Frankfurt am Main [etc.], Peter Lang, 2004; see the item *Philanthropinisme, Philanthropimstes*, in *Nouveau dictionnaire de Pédagogie et d'instruction primaire publié sous la direction de Ferdinand Buisson (édition de 1911)*, L'édition électronique, Ifé-Institut Français de l'éducation, <<http://www.inrp.fr/edition-electronique/lodel/dictionnaire-ferdinand-buisson/document.php?id=3378>> (last access: December 23rd, 2012).

⁴ N. Bocșan, *Contribuții la istoria iluminismului românesc* [Contributions to the History of the Romanian Enlightenment], Timișoara, Facla, 1986, pp. 242-243.

that was proposed by the Philanthropinist school was the Austrian Empire, where it was disseminated in the farthest corners of the monarchy. It was also the case of Transylvania, the Banat and Partium⁵, where the ideas of Philanthropinism had entered since the early nineteenth century, influencing Romanian pedagogical thought and literature until the middle of the century.

Its dissemination in the Romanian cultural space could not be understood or recuperated historically without taking into account the specific cultural context and horizon of the Romanian territories from the Austrian Empire during the late eighteenth and the early nineteenth century. This was an extremely fertile mental and cultural climate, which had been carefully prepared by the Austrian Enlightenment and Reformism. Its beginnings were linked to the very conquest of Hungary, Transylvania and the Banat by the Habsburgs, which had occurred in the early eighteenth century, facilitating the entry of these territories in the general European circuit and their connection to the major cultural and political currents of the time, marked by the spirit of the *Aufklärung*. The change became operational once the Viennese court had adopted, through Empress Maria Theresa and then through Emperor Joseph II, the Enlightenment as a state policy, in the form of an entire reformist program that envisaged the homogenisation and consolidation of the monarchy. Vienna's policy was necessary especially since the new provinces that were part of the Empire brought their own ethnic-confessional, legal and cultural realities, which were very diverse and had to be integrated, streamlined and made loyal to the Throne. This explains the Theresian and Josephinist Reformism inaugurated in the Empire shortly after the middle of the eighteenth century, which was targeted at almost all the structures of society, with particular emphasis on teaching and education. Schools thus became fundamental institutions of the state that had to ensure, first of all, the forming of the individuals as citizens with at least a minimum amount of education, who would responsibly fulfil their obligations to the state, and then to transform them into reliable taxpayers, good militaries and, last but not least, loyal subjects of the emperor and the state⁶. This is how, following the path opened by the Enlightenment philosophy, which advocated the emancipation and cultivation of the individuals, the Austrian State valorised particularly the utilitarian dimension of this ideology, institutionalising the Enlightenment as genuinely reformist official program, applied to the entire Empire. Its effects

⁵ The *Partium* or the annexed parts of Transylvania represented the term or the syntagm that territorially designated the areas of Maramures, Satu Mare, Zarand, Bihor, Arad (today situated in the north-western part of Romania), but which belonged to Hungary politically and administratively, starting from the eighteenth century and until 1918. See A.E. Dörner, *Transilvania în cadrul Monarhiei habsburgice (1711-1847). Evoluții și structuri administrative* [Transylvania in the Habsburg Monarchy (1711-1847). Administrative Developments and Structures], in Pop, Năgler, András (edd.), *Istoria Transilvaniei* [History of Transylvania], cit., p. 20.

⁶ Bocșan, *Luminile și pașoptimul* [The Enlightenment and the 1848 Revolution], cit., p. 125.

were shortly translated into a growing number of schools and the edification of a modern education system, with a utilitarian, practical, rationalistic and moralistic character⁷.

For the Romanians in Transylvania, the Banat and the Hungarian areas, the effects of this educational and cultural Enlightenment reformism were unprecedented⁸. It was the first time in their history as an *unaccepted nation*⁹ that the Romanians were to benefit from the right to establish and attend schools, under the patronage of the church or the state¹⁰, thus opening their access to education and culture¹¹. Of course, some of them, those who had embraced the religious Union with the Church of Rome had already benefited from a small cultural niche through the Greek Catholic Church¹². However, it was far from sufficient. Not surprisingly, ever since the beginning of this reformist program, the Romanians had taken advantage of this *cultural opening* in order to form their own intellectual elite, which gradually engaged in the service of the national and political ideals. These intellectuals were increasingly better trained, from one decade to another, becoming capable of assimilating the principles of the European Enlightenment and entering a dialogue with the movement of ideas in that period, contributing to its enrichment and its refinement.

Of course, this increase in the number of schools was not just quantitative, but was accompanied by a genuine qualitative leap, detectable especially in

⁷ *Ibid.*, pp. 125-126.

⁸ M. Bernath, *Habsburgii și începuturile formării națiunii române* [The Habsburgs and the Beginnings of the Romanian Nation], Cluj, Dacia, 1994, pp. 161-258.

⁹ *Non-accepted nation*: a consecrated syntagm for the legal status of the Romanians in Transylvania, who had been barred, ever since the Middle Ages, from political and religious rights by the Hungarian, Saxon and Szekler nobilities, which thus became the guarantors of a discriminatory legal system, perpetuated until the late modern age.

¹⁰ According to the data available in this regard, while in the mid-eighteenth century, there were 53 Romanian Greek-Catholic schools in Transylvania, their number increased to over 300 towards the end of the century. To them was added, at the end of the same period, a total of 125 Orthodox denominational schools. For the Banat, the situation was as follows: in the 1760s, there were recorded 23 Romanian Orthodox schools, whose number reached 328 in 1802. We can also add that at the level of the border regiments created by Empress Maria Theresa, compulsory elementary education was introduced in the mid-nineteenth century, in 1829, each community being required to have an elementary school. See Bocșan, *Luminile și pașoptimul* [The Enlightenment and the 1848 Revolution], cit., pp. 127-128; M. Andrei, *La granița imperiului. Vicariatul greco-catolic al Rodnei în a doua jumătate a secolului al XIX-lea* [At the Border of the Empire. The Greek-Catholic Vicariate of Rodna in the Second Half of the Nineteenth Century], Cluj-Napoca, Argonaut, 2006, pp. 258-290.

¹¹ I. Bozac, P. Teodor, *Învățământul românesc din Transilvania în secolul al XVIII-lea și începutul secolului al XIX-lea* [The Romanian Education in Transylvania in the Eighteenth Century and the Beginning of the Nineteenth], in I.P. Teiușan (ed.), *Din istoria pedagogiei românești* [From the History of Romanian Pedagogy], 3 vols., Bucharest, Editura didactică și pedagogică, 1966, Vol. II, pp. 143-170.

¹² K. Hitichins, *Conștiință națională și acțiune politică la românii din Transilvania 1700-1868* [National Conscience and Political Action with the Romanians from Transylvania 1700-1868], 2 vols., Cluj-Napoca, Dacia, 1987, Vol. I, pp. 41-82.

the teachers' level of training, in the school curricula and in the pedagogical concepts or methods practised in the Romanian schools. An entire pedagogic literature, in Romanian, began then to proliferate in Transylvania. These were works with a didactic-pedagogic character that accompanied the entire process of education and literacy development inaugurated by Reformism and that would evolve throughout time from simple methodologies or didactics, translated from foreign authors, to genuine treaties of pedagogy, adapted to the realities and expectations of the Romanian society¹³.

Chronologically, during the period under study, there were three major stages in the evolution of pedagogical literature for the Romanians from Transylvania, the Banat and Partium. The first began with Theresan-Josephinist Reformism and manifested itself until the death of Joseph II. The second started in the last decade of the eighteenth century and lasted until the third decade of the next century, being the stage of mature Enlightenment and of the reception of Philanthropinism. The third – and last – stage was that of romanticism: it began in the fourth-fifth decades of the nineteenth century, with extensions, at times, into its latter half.

All the three stages had a common denominator, given the overwhelming influence of the German *Aufklärung* at that time. The difference between them rested solely in the pathway through which they entered the Romanian provinces. For instance, while in Transylvania the reception of the German pedagogy was direct, unmediated, the situation was different in the Banat, where the autonomy status of the province (until 1778, when it was annexed to Hungary), and the major influence of the Serbian Orthodox hierarchy led to the reception of German Enlightenment model through the Serbian filter; this explains the numerous translations – from Serbian into Romanian – of many works of pedagogy produced in the German world¹⁴.

As regards the first stage, delineated above, it should be noted that its specific pedagogical literature contained didactic writings inspired by the official reformist program. Illustrative in this sense is the first work of methodology printed in Romanian, in 1777, under the title *De lipsă cărțice* ('A Needed Booklet'), which was nothing more than a translation of Felbiger's methodology¹⁵. Felbiger was the main ideologue of Austrian School Reformism in the eighth decade of the eighteenth century. Moreover, the translations into

¹³ Bocșan, *Contribuții la istoria iluminismului românesc* [Contributions to the History of the Romanian Enlightenment], cit., p. 325; L. Protopopescu, *Contribuții la istoria învățământului din Transilvania* [Contributions to the History of Education in Transylvania], Bucharest, Editura didactică și pedagogică, pp. 89-151; Ghișe, Teodor, *Fragmentarium iluminist* [Illuminist Fragmentarium], cit., pp. 213-243; V. Țărcovnicu, *Contribuții la istoria învățământului românesc din Banat (1780-1918)* [Contributions to the History of the Romanian Education in the Banat (1780-1918)], Bucharest, Editura didactică și pedagogică, 1970, pp. 39-109.

¹⁴ Bocșan, *Luminile și pașoptimul* [The Enlightenment and the 1848 Revolution], cit., p. 130.

¹⁵ Țărcovnicu, *Contribuții la istoria învățământului românesc din Banat (1780-1918)* [Contributions to the History of the Romanian Education in the Banat (1780-1918)], cit., p. 53.

Romanian of Felbiger's textbooks and their use in the Romanian schools led to the imposition of the tabular and linear method, which subsequently became prevalent in Romanian pedagogy¹⁶. To these methodological writings were then added a series of Cyrillic readers, primers and reading comprehension textbooks that amounted to about 30 titles in the period 1777-1800¹⁷. It was through Felbiger's and Baumeister's textbooks, and through the philosophy courses delivered in the schools from Blaj, the most important centre of the Enlightenment in Transylvania, that Romanian culture was exposed to the ideas of Christian Wolff, who, for the Romanians, represented one of the most renowned and esteemed philosophers at that time¹⁸.

Referring to specific pedagogical concept of that first period, it should be noted that this conception of education had been marked by the utilitarian and pragmatic vision of the Josephinist generation. Conceived almost exclusively within the school framework, education was supposed to envisage the formation of the good citizen, obedient to the monarch, responsible and capable of meeting the exigencies of the rationalist state. The utilitarianism and pragmatism of that period were gradually and continuously enriched and diversified through the association of new values and outlooks. For example, the significances that utilitarian and pragmatic education increasingly became associated with towards the end of the eighteenth century consisted in the rational and moral character of education, thus anticipating the launching of a new stage in the pedagogical thought of the Romanians from the Austrian monarchy.

The start of the second stage was linked to the new political context created in the Empire with the death of Joseph II (1790) and the restoration regime which, while mitigating, to some extent, the Josephinist school élan, could not suppress it or cancel its effects on the educational and school level. On the contrary, the Romanian intellectual elite, formed throughout the century in the wake of Josephinist reformism, expanded its numbers and, especially, its concerns and interests in disseminating the Enlightenment and education to the lower strata of society. The entire period between the last decade of the eighteenth century and the third decade of the next century stood under the sign of the plenitudinous assertion of the Enlightenment. This was the period

¹⁶ Protopopescu, *Contribuții la istoria învățământului din Transilvania* [Contributions to the History of Education in Transylvania], cit., pp. 154-162.

¹⁷ For instance, in the 1770s and the 1780s, in the printing presses from Vienna, Buda, Blaj and Sibiu, there were printed, for the Romanians, approximately 12 editions of Cyrillic readers, of which 6 were in the Romanian language, 5 bilingual (Romanian-German), and a primer in the Romanian, Latin, German and Hungarian languages. See Protopopescu, *Contribuții la istoria învățământului din Transilvania* [Contributions to the History of Education in Transylvania], cit., pp. 100-101.

¹⁸ Ghișe, Teodor, *Fragmentarium iluminist* [Illuminist Fragmentarium], cit., pp. 213-231.

when the Romanian Enlightenment became individualised and adopted its own orientation that would influence the Romanian cultural movement until quite late¹⁹.

What contributed decisively in this direction was education. This was an objective which had to be primarily achieved through literature and the school system, and to which the mature Enlightenment generation gradually added other channels, such as the press, the libraries and the cultural associations. Of all these, didactic and pedagogical literature occupied a distinct place among the concerns of the intellectuals from that time. Several favourable factors were conducive to this effect, prioritising this domain, encouraging and innovating it, which led to the autonomous development of pedagogy as a modern study discipline. Of the aforementioned factors, mention should be made, first of all, that an Oriental section of the printing press was opened at the University of Buda, with a view to its publishing works in Romanian²⁰. This, along with the episcopal printing presses from Blaj and Sibiu, contributed greatly to increasing the production of books, especially those with a pedagogical and vulgarising character dedicated to the Romanians. Then, it should be noted that in the early nineteenth century, the centre of gravity of the Romanian cultural movement gradually moved from Blaj (Transylvania) to Arad and Oradea, two towns from Partium (the eastern part of Hungary) that were extremely dynamic in economic and cultural terms. In Arad, for example, the first Romanian *preparandia* (pedagogical institute) was set up in 1812, providing the necessary framework for training the first generations of teachers with higher education qualifications, in line with the new requirements of the time²¹. In Oradea there operated an Academy of Law where a large part of the Romanian intellectuals underwent training.

Both the academy and, especially, the *preparandia* were to become, in a short time, true cultural hotbeds rallying around them a large part of the Romanian intellectual elite, occasioning points of contact with the European ideas and models, and spaces of practising and disseminating the new pedagogical concepts. Here could be encountered Dimitrie Țichindeal, Paul Iorgovici, Grigore Obradovici, Constantin Diaconovici-Loga, Ioan Mihuț, Alexandru Gavra, Damaschin Bojincă and others. Theirs is the merit of having set into circulation a pedagogical literature that was superior to that of the second

¹⁹ Bocșan, *Luminile și pașoptimul* [The Enlightenment and the 1848 Revolution], cit., p. 124.

²⁰ *Ibid.*, p. 129.

²¹ V. Popeangă, E. Găvănescu, V. Țârcovnicu, *Preparandia din Arad* [The Pedagogical School from Arad], Bucharest, Editura didactică și pedagogică, 1964, pp. 8-68; V. Popeangă, *Mărturiile transilvănene despre acte creatoare de pedagogie românească*, Arad, Vasile Goldis University Press, 2007.

half of the eighteenth century, illustrating a higher level of theorisation and conceptualisation, in a synchronous process with the level European pedagogy had reached²².

The one who inaugurated a new concept of education was Paul Iorgovici, a distinguished scholar with training sessions in Paris, Vienna and Rome, who published *Observații de limbă românească (Observations on the Romanian Language)* in Buda in 1799, a work that was reprinted in Wallachia decades later²³. According to him, education was seen as a process targeting not only individuals, as self-sufficient entities, but also the community to which they belonged, and whose progress he considered to be closely related to the level of education. The conception professed by Iorgovici, a clear evidence of contact with the French cultural climate, paved the way for the reception of Neo-Humanism and Philanthropinism by the Romanians.

The one who arguably developed the most elaborated concept of education is Ioan Mișuț, a professor of pedagogy and methodology at the *preparandia* from Arad during the period 1812-1816, then a director of the school district of Caransebeș (1816-1835)²⁴. His works, some of which have remained in manuscript, while others have been published, illustrated the reception of the Philanthropinist pedagogy in the highest degree. Emblematic of this was the *Manuductor* published in Buda in 1818. Unsigned, the compendium has led some historians to assign it to Naum Petrovici, a well-known scholar of the time, especially given his interest in education, as one who had translated in the same year, 1818, Villaume's *Pedagogy and Methodology for Schools Teachers*²⁵. However, the research undertaken on the *Manuductor* in the last half of the twentieth century assigned its authorship to Ioan Mișuț. Advocated by the historian Nicolae Bocșan, the thesis of Ioan Mișuț's paternity over the *Manuductor* was supported by his manuscripts that have been preserved until today: *Cercare publică din pedagogie și metodică*, 1814 ('A Public Experiment in Pedagogy and Methodology') and *Introducere în pedagogie*, 1815 ('Introduction to Pedagogy'), which are synthesised in the *Manuductor* of 1818²⁶.

²² Bocșan, *Contribuții la istoria iluminismului românesc* [Contributions to the History of the Romanian Enlightenment], cit., p. 240.

²³ Ghișe, Teodor, *Fragmentarium iluminist* [Illuminist Fragmentarium], cit., pp. 232-233.

²⁴ Țărcovnicu, *Contribuții la istoria învățământului românesc din Banat (1780-1918)* [Contributions to the History of the Romanian Education in the Banat (1780-1918)], cit., pp. 78-79.

²⁵ Ghișe, Teodor, *Fragmentarium iluminist* [Illuminist Fragmentarium], cit., p. 239; Iarcu, *Repertoriu chronologic sau Catalog general de cările române imprimate de la adoptarea imprimeriei, jumătate seclul XVI și până astăzi. 1550-1865 exclusiv* [Chronological Repertoire or General Catalogue of Romanian Books Printed since the Adoption of the Printing Press, from the Mid-Sixteenth Century until Today. 1550-1865 Exclusively], cit., p. 30; Țărcovnicu, *Contribuții la istoria învățământului românesc din Banat (1780-1918)* [Contributions to the History of the Romanian Education in the Banat (1780-1918)], cit., p. 77.

²⁶ Bocșan, *Contribuții la istoria iluminismului românesc* [Contributions to the History of the

As we stated at the beginning of this study, Mihuț's writings are not original works, but translations from Niemeyer, whom the author truly appreciated, referring to him as one «who is most special» among all the pedagogues of the time²⁷. We do not know for sure when Mihuț got to read Niemeyer, but it was most probably during his studies in Pest. What would substantiate such a hypothesis is the fact that Niemeyer enjoyed great popularity in the Hungarian schools, which were also attended by Romanians at that time. The contact with the work of the German pedagogue deeply marked Mihuț, determining him to process Niemeyer's fundamental work, *Grundsätze der Erziehung und Unterrichts*, and establish it as the cornerstone of his pedagogical conception, admirably synthesised in the *Manuductor* from 1818.

According to him, Mihuț professed a broad conception of education, which took into account the totality of an individual's manifestations.

«It is not required – for this would not be possible», Mihuț wrote, «that man should be given at birth something that is not intrinsic to him and his nature, or that goes against his most natural state; what is required is that the powers that are in man, freely exhibited, should be amended and improved, so that they may soon and most resultfully reach perfection, while through teaching man is given something and accumulates knowledge and ideas, and later man's faculty of knowing, in other words, of growth becomes separated from learning»²⁸.

The first idea that emerges is that education must take into account the child's individual potential and its intrinsic peculiarities. Education helps stimulate and develop «the powers that are in man». A child's inner nature is an asset the child is born with, and educators should always seek to discover and develop it²⁹. It follows then that for Ioan Mihuț education (or *growth* – as he called it) was clearly delineated from instruction, the former assuming the major role of dealing with “spiritual powers”, namely, the formation of the individual from a moral, intellectual and aesthetic standpoint.

Detailing all these components of education or «spiritual growth», he pleaded for cultivating imagination (dubbed as «the power to envision»), the intellect, language, the ability to feel (that is, to resonate with others), to want, to uphold the truth and moral character. Only these, he said, could lead to «moral accomplishment». A careful analysis of all these aspects of education invoked by Mihuț is undoubtedly reminiscent of the Neo-Humanist and Philanthropist pedagogy, with which he resonates and from which he gets inspired.

His analysis also made reference to religious education, which he conceived as necessary to moral training, but always placed after it. The importance

Romanian Enlightenment], cit., pp. 238-239.

²⁷ *Ibid.*, p. 200.

²⁸ *Manuductorul pentru învățătorii scholasticești [Manuductor for Scholastic Teachers]*, cit., p. 95.

²⁹ Țărcovnicu, *Contribuții la istoria învățământului românesc din Banat (1780-1918)* [Contributions to the History of the Romanian Education in the Banat (1780-1918)], cit., p. 80.

Mihuț attaches to religious education was an expression of the deism practised by the German Enlightenment, from which he was inspired, as well as of the Romanian realities, still profoundly marked by the religious dimension.

Referring to the spiritual powers, Mihuț also introduced in the analysis the physical dimension of the individual, understood in the sense of bodily strength and granted complementary status in the educational process: «man's physical strength, combined with spiritual strength, is the object of growth»³⁰. The attention given to the body through the plea for introducing school physical education classes in school belonged to the same linear pedagogical inheritance of Philanthropinism³¹.

The point where he was fully consonant with the Philanthropinist conception and methods resided in his recommendations on the manner of correcting and improving student behaviour. Like Basedow and his disciples, Mihuț denied the usefulness of punishments in general, let alone physical disciplining. Moreover, he recommended that if forced to resort to such punishment, prospective teachers should emphasise their repulsion for such practices. According to him, the teacher's interest should focus not on punishment but on an attractive education, addressed to the entire society, regardless of social status³².

Conceived, by excellence, within the school framework, education proved, in Mihuț's work, a remarkable unity, a hitherto unattained level of theorising, which contributed to pedagogy gaining autonomy as a distinct discipline in the Romanian space. Finally, the *Manuductor* has the merit of having adopted some of the breakthroughs of Romanian educational thought from the previous period, enriching them and transmitting them to the future generations. One of them was the concept defined a few years earlier by Paul Iorgovici, concerning the relationship between the society's education and welfare levels. Following in Iorgovici's footsteps, Mihuț pointed out in the preface to the *Manuductor*, the interdependence between a 'higher culture' and its 'civic' welfare³³, thus clearing the path for the transition from individual education to the education of society at large, which became the *motto* of his whole generation.

As proof that the ideas and methods suggested by Mihuț enjoyed a real audience in the Romanian education stood the reprinting of the *Manuductor* in 1848³⁴, and the long-term use of his manuscripts as course hand-outs at the

³⁰ *Ibid.*

³¹ See *Philantropinisme, Philantropimstes*, in *Nouveau dictionnaire de Pédagogie et d'instruction primaire publié sous la direction de Ferdinand Buisson (édition de 1911)*, cit.

³² Țărcovnicu, *Contribuții la istoria învățământului românesc din Banat (1780-1918)* [Contributions to the History of the Romanian Education in the Banat (1780-1918)], cit., p. 80.

³³ Ghișe, Teodor, *Fragmentarium iluminist* [Illuminist Fragmentarium], cit., p. 240.

³⁴ Cfr. Iarcu (ed.), *Repertoriu cronologic sau Catalog general de cările române imprimate de la adoptarea imprimeriei, jumătate seclu XVI și până astăzi. 1550-1865 exclusiv* [Chronological Repertoire or General Catalogue of Romanian Books Printed since the Adoption of the Printing Press, from the Mid-Sixteenth Century until Today. 1550-1865 Exclusively], cit., p. 59.

preparandia from Arad³⁵. One should also not neglect the long directorship period (from 1816-1835) that Ioan Mihuț embarked upon at the schools from Caransebeș, a position from which he contributed, through school circulars and directives, to ensuring the reception of his teaching philosophy and pedagogical methods³⁶. That his pedagogical orientation was highly appreciated at that time was attested by his very appointment, out of a large pool of candidates, as professor of pedagogy at the *preparandia* from Arad, where the school principal, Dimitrie Țichindeal, had chosen him because «he understood the new scholastic thing»³⁷.

Besides Ioan Mihuț, another representative of the Romanian Philanthropist School can be considered his colleague from the *preparandia* in Arad, Constantin Diaconovici-Loga. His fundamental pedagogical work was *Ortografia sau dreapta scrisoare pentru îndreptarea scriitorilor limbii românești*³⁸ ('Orthography or the Right Spelling for the Correction of Writers in the Romanian Language'), published in Buda, in the same year as the *Manuductor*, 1818. Far from being a mere linguistic guide, Diaconovici-Loga's *Ortografia* was, above all, a pedagogical manual, in which the author inserted a series of «teachings about the growth and correction of the youth», which crystallised his pedagogical conception³⁹. The result of ten years of teaching activities, his grammar textbook synthesised a genuine practical experience that he correlated with the spirit and ideology of Neo-Humanism, represented by Niemeyer, whose works were already known in Arad.

However, unlike Mihuț, Constantin Diaconovici-Loga had a less elaborate pedagogical conception, though not far below the level of the era. He conceived of education (growth) as subordinated to a clearly defined goal: the bodily and spiritual perfection of the youth⁴⁰. Loga considered that the perfection of the human being depended on three main factors: the native potential, education and diligence, drawing therefore close to Niemeyer and his pedagogical outlook. As for diligence, seen as a component part of education, Loga stressed the key role played by the individual's work and personal exertion, regardless of the

³⁵ Popeangă, Găvănescu, Țârcovnicu, *Preparandia din Arad* [The Pedagogical School from Arad], cit., p. 53.

³⁶ N. Bocșan, V. Leu, *Școală și comunitate în secolul al XIX-lea. Circularele școlare bănățene* [School and Community in the Nineteenth Century. The School Circulars from the Banat], Cluj-Napoca, Presa Universitară Clujeană, 2002, pp. 16-26.

³⁷ *Foaia diecezană* [Diocesan Sheet], «Organul eparhiei ortodoxe române a Caransebeșului», vol. 38, 15 January 1923, p. 3.

³⁸ Cfr. Iarcu (ed.), *Repertoriu cronologic sau Catalog general de cările române imprimare de la adoptarea imprimeriei, jumătate seclu XVI și până astăzi. 1550-1865 exclusiv* [Chronological Repertoire or General Catalogue of Romanian Books Printed since the Adoption of the Printing Press, from the Mid-Sixteenth Century until Today. 1550-1865 Exclusively], cit., p. 30.

³⁹ Popeangă, Găvănescu, Țârcovnicu, *Preparandia din Arad* [The Pedagogical School from Arad], cit., p. 27.

⁴⁰ *Ibid.*, p. 35.

individual's native potential. «A man with genius, that is, a man whom nature has endowed with talents can reach far with his learning only through his own diligence»⁴¹.

In the spirit of his generation, he separated education from instruction, the former dealing with «improving the heart» and the latter with the «enlightenment of the mind», with an emphasis on moral education⁴². Along the lines opened by the Philanthropinists, he would not accept the harsh, punitive methods of educating the students, which he substituted with moral sentences, rendered in his work as moralising lyrics, such as: «do not lie, for a lying man is welcome nowhere; Beware of deeds of shame»⁴³ and others. His name was also linked to the introduction in the *preparandia* of Arad of the first practical courses on beekeeping and silkworm farming, gardening and tree grafting⁴⁴. His desire to imprint a practical orientation in Romanian education was consistent with an ever more dynamic economic evolution in that period, which also comprised the Romanian territories. He responded thus to one of the methods proposed by Philanthropinism, which advocated educating a child by illustrating objects and by the child's direct contact with them.

It should be noted that some of the pedagogical ideas and concepts presented in *Ortografia* in 1818 were systematised several years later, in his work *Chiemare la tipărirea cărților rumânești* (*A Plea for the Printing of Romanian Books*), which appeared at Buda in 1821⁴⁵. Its undeniable merit is that it outlined an entire program of cultural literacy for the Romanians⁴⁶, continuing thus the postulate of his generation that the focus of education should be transferred from the individual to the entire national community.

Concurrently with the pedagogical and cultural activities organised around the *preparandia* from Arad, in the first decades of the nineteenth century, other intellectuals with similar preoccupations had started to assert themselves in the cultural centre of the Enlightenment from Oradea. The most illustrative case in this regard was that of Damaschin Bojincă⁴⁷. A jurist by profession, with an

⁴¹ Ghișe, Teodor, *Fragmentarium iluminist* [Illuminist Fragmentarium], cit., p. 235.

⁴² Bocșan, *Contribuții la istoria iluminismului românesc* [Contributions to the History of the Romanian Enlightenment], cit., p. 240.

⁴³ Popeangă, Găvănescu, Țărcovnicu, *Preparandia din Arad* [The Pedagogical School from Arad], cit., p. 34.

⁴⁴ Țărcovnicu, *Contribuții la istoria învățământului românesc din Banat (1780-1918)* [Contributions to the History of the Romanian Education in the Banat (1780-1918)], cit., pp. 90-92.

⁴⁵ Cfr. Iarcu (ed.), *Repertoriu cronologic sau Catalog general de cărțile române imprimate de la adoptarea imprimeriei, jumătate seclul XVI și până astăzi. 1550-1865 exclusiv* [Chronological Repertoire or General Catalogue of Romanian Books Printed since the Adoption of the Printing Press, from the Mid-Sixteenth Century until Today. 1550-1865 Exclusively], cit., p. 31.

⁴⁶ Ghișe, Teodor, *Fragmentarium iluminist* [Illuminist Fragmentarium], cit., p. 234.

⁴⁷ For the most complete monograph dedicated to Damaschin Bojincă, see N. Bocșan (ed.), *Damaschin Bojincă, Scrieri. De la idealul luminării la idealul național* [Damaschin Bojincă, Writings. From the Ideal of the Enlightenment to the National Ideal], Timișoara, Facla, 1978.

outstanding training and education obtained in Timișoara, Seghed, Oradea and Pest, Bojincă was the author of a valuable work with a polemical, historical and pedagogical character. We will stop in what follows solely on the pedagogical aspect, considered to be one of the late representatives of Philanthropinism among the Romanians.

The representative work for his pedagogical conception was *Diregătoriuul bunei creșteri*⁴⁸ ('The Guide to a Proper Growth'), a small treatise on education, published in Buda in 1830. It was neither an original work, nor a translation, but a compilation of the most representative pedagogical ideas of the time, in which the concept postulated about education referred, broadly, to the entire nation: the school system, the family, society and self-education. Like his predecessors from Arad, Bojincă assigned a twofold meaning to education. On the one hand, he saw it as a means of discovery and enhancement of the individual's innate equipment, and on the other, as growth, that is, learning, or the acquisition of ideas, the sciences and the ability to think and act independently⁴⁹. It can be seen therefore that Bojincă too manifested confidence in man's native potential, a major idea of Neo-Humanism, disseminated among the Romanians through Niemeyer's work. In the sense of the same Neo-Humanism, the concept of education proposed by Bojincă envisaged a harmonious intellectual and moral development, in which moral education had the primacy, in full agreement with the moralism of the time.

Relatively original was the manner in which he conceived and explained the indissoluble relation between education and culture, the former being considered the gateway to the latter. According to this belief, he convincingly argued for the generalisation of education across the entire national collectivity, encouraging, to this end, the support of the printing and reading of Romanian books⁵⁰. In addition, he pleaded, like Niemeyer, for a differentiated education, according to social class and in full compliance with each and every individual's concerns⁵¹. He rejected the method of corporal punishment, advocating alternative measures: «and speaking of punishment, I comprehend not bodily beating, but on the contrary, let any other thing that is not to the liking of the infant and totally goes against its will be done, and that will be enough punishment for it»⁵².

⁴⁸ D. Bojincă, *Diregătoriuul bunei creșteri spre îndreptarea multor părinți și bunfolosul tinerimii române* [The Guide to a Proper Growth For Righting Many Parents and the Good Use of the Romanian Youth], Buda, Crăiasca tipografie a Universității ungherești, 1830.

⁴⁹ Bocșan, *Damaschin Bojincă, Scrieri. De la idealul luminării la idealul national* [Damaschin Bojincă, Writings. From the Ideal of the Enlightenment to the National Ideal], cit., p. 36.

⁵⁰ *Ibid.*, pp. 36-37.

⁵¹ Țărcovnicu, *Contribuții la istoria învățământului românesc din Banat (1780-1918)* [Contributions to the History of the Romanian Education in the Banat (1780-1918)], cit., p. 100.

⁵² Bojincă, *Diregătoriuul bunei creșteri spre îndreptarea multor părinți și bunfolosul tinerimii române* [The Guide to a Proper Growth For Righting Many Parents and the Good Use of the Romanian Youth], cit., p. 69.

Education thus became a general, collective, national imperative, a component part of a program of Romanian emancipation with profound political and social connotations.

Analysed as a whole, Damaschin Bojincă's pedagogical conception was not at all foreign to the spirit of Philanthropinism, even though its presence in his work was less blatant than in the works of Ioan Mihuț and Constantin Diaconovici-Loca. Eclectic, like almost all the works from that time, *Dirigătorul* summarises the main points of the Romanian Enlightenment, with visible influences from German Neo-Humanism and the French Encyclopedist Enlightenment⁵³.

With Damaschin Bojincă, the so-called stage of plenitudinous Enlightenment came to an ending in the territories of the Habsburg Monarchy; its achievements in the field of pedagogy were taken over and assimilated, in part, by the generations that followed. There were among them also the concepts and methods of Philanthropinist origin, disseminated throughout Transylvania and the Banat *via* the German Neo-Humanism represented by Niemeyer. The success he enjoyed in Transylvania and the Banat, as well as in the whole Austrian monarchy, was due to the extremely accessible nature of his language and ideas.

We should also add that Niemeyer's works were not the only channel for the dissemination of Philanthropinism among the Romanians, even though they were the most important. The Philanthropinist ideas were also spread through the works of Christian Gotthilf Salzmann⁵⁴, with which some of the Romanian intellectuals of the time were familiar. This is attested by the articles with an educational character published in the 1840s-1850s, in «Gazeta de Transilvania» and «Foaie pentru minte, inimă și literatură»⁵⁵, which addressed the purpose of education, the qualities required of teachers, the role and mission of school, the family etc. One of the issues often raised by the authors, in the spirit of the same Philanthropinist inheritance, was complex education, not only intellectual, but also physical and moral, with an emphasis on the last type and rejecting aggressive methods. Most of these articles were translations or adaptations after foreign authors, particularly Niemeyer and Salzmann⁵⁶. Their presence in the pages of the two Romanian periodicals for over two decades demonstrates the extension of the Philanthropinist ideas well into the mid-nineteenth century. Interestingly, for example, Alexandru Gavra, a professor at the *preparandia* from Arad, made a proposal for the establishment of a *philanthropinum* for the poor girls from the rural milieu, in order to provide

⁵³ *Ibid.*, p. 99.

⁵⁴ Christian Gotthilf Salzmann (1774-1811), an illustrious German pedagogue, a foremost representative of the Philanthropinist School.

⁵⁵ «Gazeta de Transilvania» [The Transylvanian Gazette] and «Foaie pentru minte, inimă și literatură» [Broadsheet for Mind, Heart and Literature] were the first Romanian periodicals with a political and cultural character, which appeared in Brașov, starting from 1838.

⁵⁶ G.E. Marica, *Foaie pentru minte, inimă și literatură* [Broadsheet for Mind, Heart and Literature], Bucharest, Editura pentru literatură, 1969, pp. 66-67.

them with a good education⁵⁷. His proposal was not materialised. Not until the end of the century was a Romanian school for girls set up in Transylvania. But the idea of a *philanthropinum* after the German model emphasises once again the popularity of this pedagogical current and its late extensions among the Romanians from the Austrian monarchy.

In conclusion, we can say that Philanthropinism was received and had an impact in Transylvania, the Banat and Partium at the beginning of the nineteenth century, in a period when the Romanian Enlightenment was in full maturity. Its achievements in conceptual and methodical terms, illustrated by a pedagogical literature comparable with the European results of the genre led to the emergence of pedagogy as an autonomous discipline in its own right, in the context of the intellectual preoccupations of the time. Its reception at the level of Romanian pedagogical thought accompanied and legitimised the transition from the education of an individual to that of the community, from an education dominated by religious precepts to an education predicated on reason, with profound consequences for the entire Romanian society.

⁵⁷ Popeangă, Găvănescu, Țârcovnicu, *Preparandia din Arad* [The Pedagogical School from Arad], cit., p. 42.

The Baron József Eötvös Collegium as an elite teacher training institute. The analysis of the admitted members between 1895 and 1950

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ABSTRACT: The paper analyses the development of the Hungarian secondary school teacher and the history of the József Eötvös Collegium as an elite teacher training and scientific institute between 1895 and 1950. The personal data of the former members of the Collegium till 1950 are analysed, as well as the profile of the admitted members in each periods of the history of the Collegium. Up to now nobody has researched into this topic, which is original. The importance of this theme is shown by the following data: up to 1945 730 boarding pupils successfully finished their studies at the Collegium (since 1,205). 115 of the former member became university or high school teachers, 60 of them worked at scientific institutions as researchers, 58 became heads of secondary schools, and 44 became members of the Hungarian Academy of Sciences. But most of them, 400, became secondary schools teachers, so many of the former pupils lifted up the level of the Hungarian secondary school's teaching standards. The data show how a successfully model – the Eötvös Collegium – works in teacher training.

TEE/EET KEYWORDS: Teacher Education; College of Education; Secondary School; School Effectiveness; Student Record; Hungary; XIX-XX Centuries.

Analysis of the admitted members of an elite teacher training institute¹

The scholar training institution, the Eötvös József Collegium founded in 1895 had an important role in the institutionalization of the profession of the

¹ The research was inspired by former papers on sociological examinations of the students

Hungarian secondary school teachers. The leaders of the institution aimed at the ideal of the scholar teachers and thus managed to end a debate started in the second half of the 19th century with a compromise. After the 30th Act of Parliament in 1883 was accepted, the élite of the education politics arrived at an agreement due to two reasons, which resulted in the foundation of the teacher training boarding-school named after the first minister of religion and public education. On the one hand, by the last third of the 19th century, there had been an insufficient number of teachers, and due to the tightened requirements of the secondary-school teacher qualification (1883: 30th Act of Parliament, § 60) less people managed to acquire the degree than the number of new secondary-school teacher positions created. The lack of teachers was even aggravated by the fact that a great number of teachers appointed in 1860 were superannuated in the last decade of the century². On the other hand, a part of the decision makers in contemporary education politics thought that the qualification of the secondary-school teachers was to be elevated. The Act in 1883 could only guarantee this by lengthening the time of the instruction and by prescribing a one-year long teaching practice in a secondary school. It left the relationship of the university and the – up to 1899 formally independent – Secondary-School Teacher Training Institute intact, so the conflict which developed between the two institutions due to the different aims in teacher training remained unsolved³. The foundation of the new teacher training boarding-school was an attempt⁴ to

of the Eötvös Collegium. Tímea Kovács and Pál Tibor Szabó examined the confessional, regional and social background of the students admitted to the institution between the two World Wars (T. Kovács, P. Tibor Szabó, *The confessional, geographical and society analysis of the admitted members of the József Eötvös Collegium between the two world wars*, in L. Kósa (ed.), *The intellect serves only independently. Papers and documents of the history of the 100 years ago founded József Eötvös Collegium 1895-1995*, Budapest, Gift, 1995, pp. 59-68); while Balázs Ablonczy and Iván Bertényi Jr. carried out similar research on the students who were not admitted to the Collegium (B. Ablonczy, I. Bertényi Jr., *'Inadequate. Not recommended'. The geographical and society status of the not admitted students in to the József Eötvös Collegium between the two world wars*, in Kósa (ed.), *The intellect serves only independently*, cit., pp. 69-82).

² G. Tóth, *Az Eötvös József Collegium előtörténete*, in L. Kósa (ed.), *Szabadon szolgál a szellem. Tanulmányok és dokumentumok a száz esztendeje alapított Eötvös József Collegium történetéből 1895-1995*, Budapest, Gift, 1995, pp. 13-14.

³ A. Németh, *A magyar pedagógia tudománytörténete. Nemzetközi tudományfejlődési és recepció hatások, nemzeti sajátosságok*, Budapest, Gondolat kiadó, 2005, p. 211; I. Garai, *A magyar középiskolai tanári szakma kialakulása*, in L. Horváth, K. Laczkó, K. Tóth (edd.), *Lustrum. Ménesi út 11-13. Sollemnia aedificii a D.MCMXI inaugurati*, Budapest, Typotex-Eötvös József Collegium, 2011, pp. 196-199.

⁴ Up to 1897 the operation of the institution was only provisional; its operation was not even budgeted for separately in the budgetary act. Most likely this situation was changed in the Ministry of Religion and Public Education (henceforth MRPE) due to the students of outstanding performance, which was the result of the unique training methods. Géza Bartoniék, the first head of the institution was appointed permanently in 1897, and not much later Loránd Eötvös became head of the Secondary-School Teacher Training Institute, which he restructured and integrated into the structure of the Budapest university, thus, a new structure of teacher training had been formed. Dénes Mednyánszky Library and Archive (henceforth DMLA), box 38, folder 63, 70933/1896.

solve the conflict and to improve the standard of the secondary-school teacher training.

As a result, the aim of the operation of the Collegium till 1927 was the education of highly qualified secondary school teachers who could raise the level of secondary education through their teaching activity in secondary schools. However, several members from the first generation of the Collegium graduates started to pursue academic career after exploiting the possibilities offered by the institution, which were extraordinary regarding the contemporary higher education. A great number of them acquired various positions at universities and at academic institutions. The members of this group helped the graduate students of later generations to join the academic elite, thus by the second part of the 1920's the former students of the Eötvös Collegium had played a definitive role in the Hungarian academic life in some fields (classical philology, Hungarian linguistics, history). Consequently, the educational aim of the institution underwent a significant change after 1927: then onwards the leaders of the institution targeted the supply of the academic elite. This statement is also valid for the change of 1948 since due to the changed political circumstances Tibor Lutter, the last head of the old Collegium and his followers intended to transform the Eötvös Collegium to the educational institution of Marxist scholars – in vain.

However, the paradigm shifts in the educational aims alone are not enough for the complete description of the history of the institution. Accepting the argumentation of Domokos Kosáry or slightly modifying it, I think that the history of the Eötvös Collegium can be outlined through a combination of the major turning points of the Collegium generations and the political history⁵. In accordance with this idea, I managed to separate subperiods with the help of which I structured the personal materials of those admitted to the Collegium. According to the materials kept in the Mednyánszky Dénes Library and Archive between 1895 and 1950, 1204 students were admitted to the Collegium⁶. In my paper, I intend to examine the areal and confessional distribution of the Collegium students, their social status at the time of their admission and

Under-secretary of State Mihály Zsinilnszky's letter to Curator Loránd Eötvös. Budapest, 19 January 1896.

⁵ In a study in 1989, Domokos Kosáry attempted to summarize the history of the first three generations in the Collegium. Time frames in his writing are provided by the changes in generations; I complemented this division with some significant dates from the political history and from the internal history of the institution. Thus, the following periods can be created in which I examine the students admitted: 1895-1910; 1911-1918; 1919-1927; 1928-1935; 1936-1944; 1945-1948; 1949-1950 (D. Kosáry, *Az Eötvös Collegium történetéből. Az első évtizedek 1895-1927*, in J.Zs. Nagy, I. Szijártó (edd.), *Tanulmányok az Eötvös Kollégium történetéből*, Budapest, Eötvös József Kollégium, 1989, pp. 9-40).

⁶ The personal materials of the admitted members of the Collegium can be found in DMLA, box 1, folder 1, bunch 1; box 23, folder 25, bunch 70.

the ratio of the admitted students who managed to complete their studies successfully compared to those who needed to leave the Collegium due to its selection mechanisms.

The areal distribution of the admitted members' birth place and their secondary schools

Regarding birth place, the areal distribution of the admitted students seems to be balanced if we consider the area of Hungary before the First World War between 1895 and 1918. To some extent, Pest-Pilis-Solt-Kiskun county⁷ outstood from the other counties, but not significantly, if we consider the fact that in the second part of the 19th century the interior migration targeted the middle areas of the country and the population of Budapest had exceeded a million persons by 1910⁸. 45% of the students admitted until 1918 came from areas later annexed to other countries due to the Trianon decision, and 44% from the area of Hungary after Trianon. (There is no data 11% of them)⁹.

After the First World War, the balanced areal distribution of students ended: Pest-Pilis-Solt-Kiskun county and Budapest within it started to dominate¹⁰, and their dominance became even more evident after the Second World War. Smaller and smaller number of students from areas annexed to neighbouring countries applied to and was admitted to the institution. Between the two world wars an average of 5 students, after 1945, 2 students from the areas of pre-Trianon Hungary were accepted to the Collegium¹¹. These data, on the one hand, might be attributed to the fact that after the Trianon decision serious disproportions emerged in the settlement structure, on the other hand, due to the repressive attitude of the succession states towards the Hungarian minority less and less families in the annexed areas could afford to pay for the higher education of their children in the mother country.

We can further improve our picture of the areal distribution if we examine where the students admitted to the Collegium completed their secondary school studies. In analysing the areal distribution of the secondary schools I only considered the place of the school leaving examination since several students admitted to the Collegium completed their secondary school studies in several

⁷ In the course of the analysis, the county Pest-Pilis-Solt-Kiskun comprises also the data of the students from the capital city, Budapest.

⁸ G. Gyáni, *Magyarország társadalomtörténete a Horthy-korszakban*, in Kövér, Gyáni (edd.), *Magyarország társadalomtörténete*, cit., p. 208.

⁹ See Diagram 1 in the Appendix. I would like to express my thanks to Nikolett Oláh for her help in drawing the maps.

¹⁰ See Diagram 2 in the Appendix.

¹¹ See Diagram 3 in the Appendix.

different places. These movements, however, were usually confined to a smaller region. There were only a few cases in the material I studied in the Archive where the admitted students clearly completed their secondary school studies in different parts of the country¹².

The data from 1895 to 1910 are very unreliable since the personal folders of a great number of students admitted does not reveal which secondary school they attended. Out of the single regions, Transylvania, the Felvidék and the Tiszántúl regions stand out. In this list, the dominant role of Transylvania is surprising, since a university had been operating in Kolozsvár since 1872: it seems that it was not considerably attractive in the region for those who wanted to acquire secondary school teacher qualification or wanted to start an academic career. This result must reflect the distorting effect of the nature of our sources. The prominent position of the Felvidék region in the top list is not surprising due to its network of Protestant schools since the members of The Reformed Church could perfectly exploit the Collegium for their mobility strategy. Thus, many of them applied and were admitted to the Collegium. In the period under examination no universities were available in the Tiszántúl region, thus, it is straightforward that those layers of society who were able to mobilize financial means sent their children to the capital city so that they could acquire higher qualifications.

Through studying the period from 1911 to 1919 we can gain a more illustrative picture of the areal distribution of the secondary schools attended by the students later admitted to the Collegium. The highest number of students arrived from the Felvidék region, which was followed by Transylvania, the Dunántúl, the Tisztántúl and the Duna-Tisza köze regions. The presence of the Tiszántúl and Duna-Tisza köze regions on this list is surprising for two reasons. On the one hand, after 1912 a university also opens in the Tiszántúl region¹³, on the other, the students of the Collegium who passed their school leaving examination in the Duna-Tisza köze region took this final examination either in the capital city or in a nearby city with an arranged council board (Vác, Cegléd, Gödöllő). However, Budapest did not become dominant, thus, considering the distribution of the population, the distribution of the applicants is more or less balanced in the area of the country. This phenomenon might also be related to the application system of the Collegium, since recommendations were obligatory for the admission: they could either originate from a representative of the social élite (this happened rarely) or from an alumnus of the Collegium.

¹² See Diagram 4 in the Appendix.

¹³ It is conceivable that the University of Debrecen did not offer a real alternative in the period from 1912 to 1919 for the university students of the Tisztántúl region in contrast to the capital city due to the lack of human and financial resources characteristic of the early period of the institution. However, after 1920 this effect must have changed fundamentally since by that time the frames necessary for the undisturbed operation of the institution had developed.

Consequently, one can reach the conclusion that a great number of the alumni found positions in Pest-Pilis-Solt-Kiskun county, i.e. in the capital city or in its suburbs at the beginning of their career as secondary school teacher.

In the period after 1920 the Duna-Tisza köze is the leading region, in it the group of those who passed their school leaving examination in the capital city is the largest. This can be attributed to the migration of refugees to the capital city or to its suburbs and to the disproportion in settlement structure. The proportion of those arriving from beyond the borders decreased continually. Besides, most of the students who entered the Collegium came from the Dunántúl and Tiszántúl regions. Those from the Dunántúl region tended to start their studies at the Erzsébet University in Pécs, then after one or two semesters, they attended the Pázmány Péter University, and then they found connection with the Collegium. Similar tendency cannot be observed in the case of those from the Tiszántúl region, almost exclusively they applied for a position in the Collegium without starting university studies in Szeged or in Debrecen. Thus, it can be assumed that from these regions members of social groups having conscious mobility strategy and adequate financial resources had their children enrolled in the University of Budapest and in the Collegium.

After World War II, the role of the Dunántúl region became less significant; the majority of the applicants passed their school leaving examination in the capital city. The roles of the Dunántúl and the Tiszántúl regions became balanced, while the number of the applicants from beyond the borders decreased drastically, they vanished from the institution almost completely.

The confessional distribution and the social status of the admitted members

The confessional distribution of the students admitted to the Collegium before the First World War does not show tendencies matching with the national average and similar to the balanced areal distribution¹⁴. Roman Catholics are fairly underrepresented since only 38% of the admitted students professed themselves Roman Catholics in contrast to their positions in the society and at the Budapest university¹⁵. The same can be observed in connection with Greek Catholic students and those belonging to the Orthodox Church, the latter were represented by a few students who were accepted to the Collegium with

¹⁴ For the confessional distribution see Diagram 5 in the Appendix.

¹⁵ This was also criticized by Loránd Eötvös. In a letter written in Schuldenbuch, on 10 August 1899 he encourages Géza Bartoniek to employ the Catholic Gy.B. instead of I.F. As a member of the Reformed Church, F. presumably comes from a wealthier family, he applies for a position with half of the salary, so he would be able to complete his university studies compared to B., who has no financial resources. Beside the social considerations, the proportion of the Catholics could also be improved this way (DMLA, box 39, folder 65).

the scholarship provided by the Naszódi Alapítványi Gimnázium (Naszódi Foundation Secondary School), all of them were of Romanian nationality. The co-operation of the two institutions ended after 1920 due to political reasons¹⁶. The number of Israelites is similarly low, they provided only 3% of the Collegium students; this is a low number compared to their proportion in the society, not to mention their overrepresentation at some faculties of the universities¹⁷. Possibly this is due to the fact that they targeted other positions with their mobility strategies. This assumption can be confirmed with the fact that several Israelite students admitted to the Collegium abandoned their membership due to career change. In contrast, both the Reformed (18-14%) and the Lutherans (20-7%) were strongly overrepresented in the Collegium, the latter added up to their national ratio almost three times.

This phenomenon might be explained with Viktor Karády's statement according to which those belonging to Protestant confessions intended to occupy the positions in magistrates with the least financial and social effort¹⁸. In my opinion, the Eötvös Collegium served as an excellent starting point for this mobility strategy.

After the First World War, the confessional distribution of the Collegium students also changed due to the huge human and areal losses. The proportion of the Catholics improved to some extent (55-63%), but this was still well under their proportion in the society and at the Péter Pázmány University¹⁹. Among the admitted students, Greek Catholics and members of the Orthodox Church practically do not appear, neither appear the Israelites who did not enter the Collegium not only because of their different mobility strategy, since the 25th Act of Parliament in 1920 significantly reduced their access to higher education. The greatest Protestant confession was that of the Reformed (27-20.9%), but the Lutherans continued to add up their ratio in the society and at the university more than twice in the Collegium²⁰. The data from the period after the Second World War significantly distorts the facts, several students refused to profess their confession already at the 1946 admission examination; after 1948, after the extreme left transformation of the Collegium, only a minority of students made any kind of reference to their religious life in their personal material. Characteristically, almost all of them had been excluded from the members of the institution by 1949.

¹⁶ See Gy. Kövér, *Magyarország társadalomtörténete a reformkortól az első világháborúig*, in Kövér, Gyáni (edd.), *Magyarország társadalomtörténete*, cit., p. 139.

¹⁷ See F. Pölöskei, *A budapesti Királyi Pázmány Péter Tudományegyetem 1919-1944*, in L. Szögi (ed.), *Az Eötvös Loránd Tudományegyetem története 1635-2002*, Budapest, ELTE Eötvös kiadó, 2003, p. 271.

¹⁸ V. Karády, *A francia egyetem Napóleontól Vichyig*, Budapest, Felsőoktatási Kutatóintézet-Új Mandátum, 2005, p. 204.

¹⁹ G. Gyáni, *Magyarország társadalomtörténete a Horthy-korszakban*, in Kövér, Gyáni (edd.), *Magyarország társadalomtörténete*, cit., p. 215.

²⁰ *Ibid.*

The examination of the social status of the students admitted to the Collegium is only possible through the analysis of the professions of their legal guardians²¹. In the memoirs of all former Collegium students the commonplace-like statement appears that the majority of the students accepted always came from white-collar families. On the contrary, the data shows that even among the students accepted before the First World War the Collegium members with white-collar background were only in relative majority (31%). This number is even lower than the proportion (36.8%) of students from white-collar families at the university in 1910²². Similarly, the proportion of the magistrates is also lower than at the university: while they add up 14.3% at the humanities faculty, they only add up 9% among Collegium students, their low number with all probability might be attributed to the fact that the members of this group tended to pursue law studies instead of humanities. In contrast, the proportion of widow, orphan or retired guardians was significant (15%). In their case, it was questionable right at the moment of the admission whether they had enough financial resources for the completion of the university studies, thus, the majority of them resigned from their membership on a financial basis until the base examination. Those could complete their studies who had excellent results at the university or could acquire scholarships from one of the churches. The proportions of the workers in agriculture²³ and industry were 7% and 3% respectively, which were well under their ratios in society and at the university²⁴.

Between the two world wars, the proportion of the white-collar worker guardians further diminished to 29%, which is a surprising figure, since the Collegium could have provided the white-collar workers escaping from the succession states with an excellent mobility channel to rebuild their livelihoods. The proportion of Collegium students coming from magistrate families increased to some extent, to 13%. However, the proportions of students with widow, orphan and retired guardians significantly increased, they added up 22% of the students admitted. This change is obviously connected to the influence of the world war and economic world crisis on the structure of society. They could only pursue their studies with scholarships or if they could win free membership of the Collegium. Scholarships from civil servants and starting from the academic years 1937/38 scholarships wearing the name of the governor were awarded most frequently, while after 1927 the requirements for the acquirement of free

²¹ See Diagram 6 in the Appendix on the social status of the students admitted.

²² A. Gergely, *Felvirágzás és válság. A kiegyezéstől a forradalmakig 1867-1919*, in Szögi (ed.), *Az Eötvös Loránd Tudományegyetem története 1635-2002*, cit., p. 240.

²³ I use the term workers in agriculture for families cultivating areas of 5-10 yokes, season workers, domanial servants and attendants. Usually the children of these social groups applied to the Collegium. Descendants of families with large estates were not represented in the institute, and children of peasant families with middle-sized estates also attended the Collegium in small numbers.

²⁴ See Gy. Kövér, *Magyarország társadalomtörténete a reformkortól az első világháborúig*, in Kövér, Gyáni (edd.), *Magyarország társadalomtörténete*, cit., p. 78.

membership became stricter: no first-year student could get free membership before the successful completion of the core examination due in second year. The proportion of agricultural workers decreased further to 9%, while the number of students from industrial worker families increased to more than its double: they added up 7% of Collegium students. The latter figure is significant since it exceeded remarkably their ratios in society as well as at the humanities faculty of the university; in the latter institution their proportion hardly exceeded 4% even on the eve of the Second World War²⁵.

Till 1948, under the directorship of Dezső Keresztúry, the same trends prevailed among the students accepted as between the two world wars. A third of the students were added up by those coming from white-collar families; the proportion of students with civil servant guardians slightly increased to 21%. However, due to the extreme leftist transformation of the Collegium the admission policy had drastically changed: 51% of students admitted were added up by students of worker and peasant origins, the majority of them had only vocational school leaving examination²⁶, but in some cases, they lacked even that²⁷. This modification even excelled the figures at the faculty of humanities (50%)²⁸. The white-collar background apparently counted as a major disadvantage in the admission procedure, thus, from this group, only the particularly talented could be accepted, but none of them could complete their studies since in 1948-49 all of them were excluded from the Collegium.

The over representation of the students with white-collar background appearing in memoirs dealing with the institution can be attributed to the distorting character of the human memory. Furthermore, it can also be attributed to the fact that those second or third generation white-collar students could adapt more successfully to the educational structure of the boarding-school who had inherited adequate mental and social capitals from home. In this way, they managed to complete their studies successfully with greater probability, and then they could apply to academic careers with better chances than their first generation companions.

²⁵ See Cs. Borsodi, *Az egyetem a XX. század második felében 1945-2002*, in Szögi (ed.), *Az Eötvös Loránd Tudományegyetem története 1635-2002*, cit., p. 310.

²⁶ E.g. the Collegium members Gy.F. and Gy.J. (DMLA box 5, folder 6, bunch 9; and box 9, folder 10, bunch 25).

²⁷ E.g. the Collegium members L.V. and I.V. (DMLA box 22, folder 22, bunch 65).

²⁸ See Cs. Borsodi, *Az egyetem a XX. század második felében 1945-2002*, in Szögi (ed.), *Az Eötvös Loránd Tudományegyetem története 1635-2002*, cit., p. 336.

Selective mechanisms in the Eötvös Collegium

The problems of selection are inherently connected to the analysis of the social status of the admitted students. In the 1895-1950 period of the old Eötvös Collegium the average ratio of the selection was 24%, that is, approximately every fourth Collegium student was forced to resign from their memberships due to one of the reasons represented on the diagram²⁹. Naturally, there are major differences between single periods which on the one hand could originate from the educational aims defined by the actual leaders of the Collegium and on the other they were caused by the political and social circumstances of the given subperiod. In Géza Bartoniek's time the number of students leaving the Collegium or failing to complete their studies increased significantly merely due to the First World War. A great number of students fell in battle, others gave up their membership due to their financial crisis or change in career. According to his *ars poetica*, Géza Bartoniek's intention was to educate decent teachers if possible; he turned to the means of sending down very rarely.

After the 1927 paradigm shift in the educational aims, in Zoltán Gombocz's time the ratio of selection decreased below 20%, but the data clearly show that the majority of leaving students were forced to abandon their membership due to their unsatisfactory performance in studying. After the tragically sudden death of the famous linguist professor, Miklós Szabó became head of the Collegium, who consistently stuck to the policy of his predecessor, which becomes evident from a letter of his written to the mother of a student sent down from the Collegium:

Admission to the Eötvös Collegium is a privilege granted in advance to which students have to live up during their work in the Collegium. If students have only an average performance in their studies, they have to be sent down³⁰.

The consistent practice of this principle resulted in the fact that more than a third of the students admitted did not complete their studies under his directorship. In the period after 1945 the ratio of selection increased significantly, which is primarily due to political reasons. After the abdication of Dezső Keresztúry in July 1948 several students voluntarily abandoned their membership, and the majority of the rest of the students had been excluded by 1949. A figure characteristic of the transformation of the human stock is that 60% of the students admitted between 1945 and 1948 did not complete their studies.

If we do not consider the academic year of 1949-1950 due to the ragged and turbulent history of Hungary in the 20th century, in earlier periods due to

²⁹ On the examination of the dropping out mechanisms see Diagram 7 in the Appendix.

³⁰ Letter from Director Miklós Szabó to Ms. Gáspár Dénesné. 4 April 1937 (DMLA box 5, folder 5, bunch 7).

political reasons selective mechanisms were used against students applying for admission or already admitted twice. After 21 March 1919, the declaration of the Hungarian Soviet Republic not only the Hungarian state staggered, but the Collegium was also in danger. Beside the fact that a great number of its members were killed in action or returned to the Collegium as ex-servicemen and needed to face the difficulties of the reintegration into civil life, the mere existence of the institution became also endangered³¹. Moreover, in April 1919 the Department of Public Welfare in the Public Education Council (Közoktatásügyi Népbiztosság Népjóléti Osztálya) placed several young ex-servicemen in the institution who were legally not members of the Collegium earlier³². Out of them 19 applied for admission to the institution in 1919, but all of them were rejected either due to their weak performance in their studies or due their open support of the dictatorship of the proletariat.

On 13 June 1932 the police arrested seven members of the Collegium who were accused of participation in Communist conspiracy: Zoltán Szabó, Imre Szigeti, János Bertók, Géza Jákó, Péter Mód, Gyula Schöpflin and István Stolte³³. The membership of the first two Collegium members were temporarily suspended by Zoltán Gombocz until it was revealed that they were only interested in the movement, but did not actually participate in its actions³⁴. The other five, however, were excluded from the Collegium since their participation in the action was proved in court and they were condemned to three or four months' confinement³⁵.

As it might have been revealed so far, selection mechanisms of the Collegium were intended to maintain the high level of the qualification, which could enhance the social prestige of the institution and that of the members who finished their university studies. Members were excluded or applicants were rejected merely for political reasons only in exceptional cases, in the drastic changes of the general situation of the country. The Collegium members were also liable to exclusion from the institution if they participated in illegal social movements or committed a crime³⁶.

³¹ D. Kosáry, *Az Eötvös Collegium történetéből. Az első évtizedek 1895-1927*, in J.Zs. Nagy, I. Szijártó (ed.), *Tanulmányok az Eötvös Kollégium történetéből*, Budapest, Eötvös József Kollégium, 1989, p. 27.

³² This has been revealed in the personal material of the rejected applicant K.N.V., who in his address dated on 14 June 1919 in Budapest to the commissar of public education applied for a regular membership of the institution (DMLA box 29, folder 40, bunch 35).

³³ A. Tombor, *Az 1932-es kommunista szervezkedés a Collegiumban*, in L. Kósa (ed.), *Szabadon szolgál a szellem. Tanulmányok és dokumentumok a száz esztendeje alapított Eötvös József Collegium történetéből 1895-1995*, Budapest, Gift, 1995, p. 127.

³⁴ DMLA box 19, folder 19, bunch 55.

³⁵ *Ibid.*, p. 135.

³⁶ Cases of theft occurred from time to time in the institution, for instance in 1922 Géza Bartoniek expelled Z.E.D because he lifted blankets from the Collegium and left them in pawn shops to raise money for paying his debts (DMLA box 4, folder 4, bunch 11). Another member of the Collegium, F.H. tried to steal a book from the library of the Hungarian Academy of Sciences.

Summary

In my summary, I attempt to answer the question whether the Collegium can be regarded as the centre of the secular teacher training. In my opinion, the examination of the question what kind of secondary schools the admitted students completed can provide us with a good starting point. In the training of secondary school teachers the various confessions had a significant role up to 1948; they provided secular and ecclesiastical persons with different scholarships so that they could acquire secondary school teacher qualification in one of the universities in the country, and in the end they got positions as teachers in the secondary schools of the given confessions.

If we examine the personal data of the admitted members of the Collegium, it is striking that in each sub-period, the number of those students who passed the school leaving examination in state secondary schools or in real schools was very high. This is a surprising figure even if we know that the number of state owned institutions had increased dynamically up to 1948³⁷. Thus, in the teacher training boarding-school which was founded as an experiment scholarly teacher training took place up to 1927 to raise the level of secondary school education, and later to provide supply for former alumni of the Collegium who managed to acquire academic positions. In my opinion this statement is even valid if we consider that between 1895-1902 the Premonstratensian monastery in Csorna reserved five scholarships for its members³⁸, then in the same year of their fall-out, scholarships were created by the archbishop of Nagyszében, János Metianu for one person, by the Godzsú Foundation for two persons and by the Naszód Rural Scholarship for one person so that the lack of 3000 HUF in the budget could be compensated. The reformed diocese in the Tiszántúl region reserved scholarships for two persons in the Collegium between 1897 and 1907³⁹. However, after World War I, all confessional scholarships terminated.

During its more than 50 years' operation the Eötvös Collegium achieved great results in the field of teacher training, it educated not only teachers and scholars, but also reflecting persons. The political elite after completing Sovietisation did not tolerate critical thinking and the humble attitude towards sciences and the humanities after 1948, thus, with a decree of the cabinet council, the legal background for the termination of the Collegium was created in January 1949. The Act of Parliament titled *On the subject of reorganizing the*

Since this is one of the most serious crimes that can be committed in the Collegium, he was excluded from the institution immediately (DMLA box 7, folder 8, bunch 21).

³⁷ See I.G. Kovács, G. Kende, *A tudáselit középiskolái. A két világháború közötti tudáselit középszintű iskoláztatása*, «Korall», n. 3-4, 2001, pp. 182-184.

³⁸ The members of the Premonstratensian monastery in Csorna only met the fellow students on the courses, otherwise they lived in segregation in the boarding-school (DMLA box 36, folder 54).

³⁹ Documents and letters related to the different scholarships can be found in DMLA box 36 folder 54.

humanities and science instruction at the university terminated the operation of the secondary school teacher training institutions working in cooperation with the universities and that of the committees supervising the teachers' work both of which were formed in accordance with the 27th Act of Parliament in 1924. In short, the new Act of Parliament terminated the structure of teacher training system, which was headed by the Eötvös Collegium. A decree made on the 17th of August in 1950 at a lower level of government, by the Minister of Religion and Public Education decided about the staff of the Collegium⁴⁰. The Ministry basically divided the teachers of the institution into two groups: those regarded as politically unreliable were put on administrative leave⁴¹ and those connected to the Hungarian Working People's Party or recorded as so-called fellow-travellers were relocated to other institutions of public education or academic organizations⁴². From then onwards, the building of the Collegium was taken over by the Course Supply Firm, which degraded the centre of the Hungarian academic education to a simple youth hostel⁴³.

⁴⁰ DMLA box 43, folders 76-78. Personal material of the teachers and employees between 1945 and 1950.

⁴¹ Among the teachers such examples are Doris Elrick, wife of József Hatvany and Albert Szegő (Gyergyai) about whose transfer no data are available. The former resigned from the position of the English lector of the Collegium with a deadline of 15 October 1950 (DMLA box 46, folder 84/1).

⁴² Director Tibor Lutter, Lajos Fülep, László Gáldi (Göbl), Károly Mollay and Árpád Szabó. The latter one seems to have been well-informed about the future of the institution since he was transferred to the Faculty of Humanities, Péter Pázmány University without informing the leaders of the Collegium.

⁴³ A. Kapitány, *Az 1950-es évek a Kollégium történetében. A diákszállóvá alakítástól a Kollégium újjászervezéséig*, in Horváth, Laczkó, Tóth (edd.), *Lustrum. Ménesi út 11-13. Sollemnia aedificii a D.MCMXI inaugurati*, cit., p. 365.

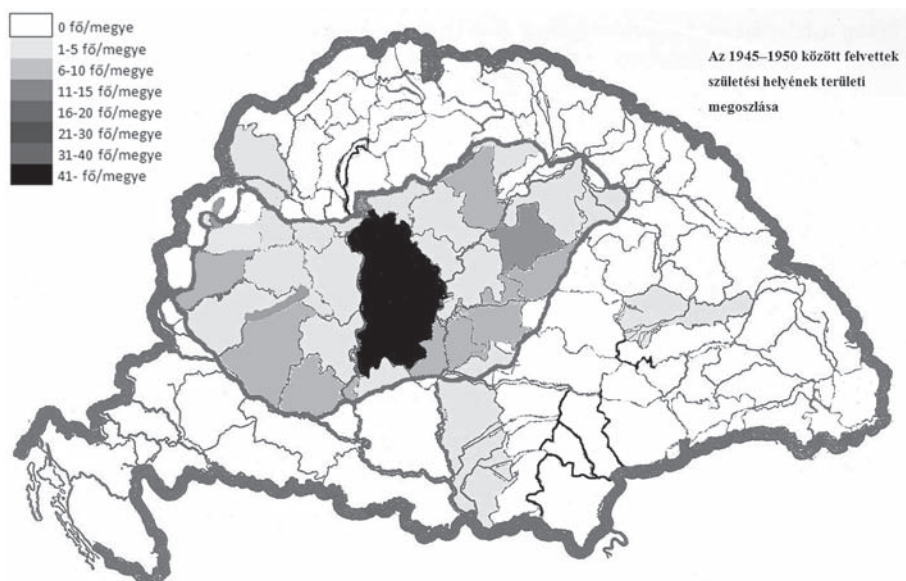


Diagram 3. The regional distribution of admitted members between 1945 and 1950.

The areal distribution of the secondary grammar school of the admitted members 1895-1950

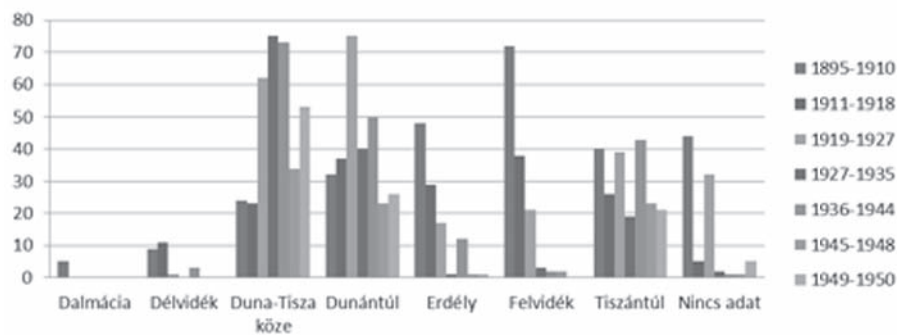


Diagram 4. The areal distribution of the secondary grammar school of the admitted members between 1895 and 1950.

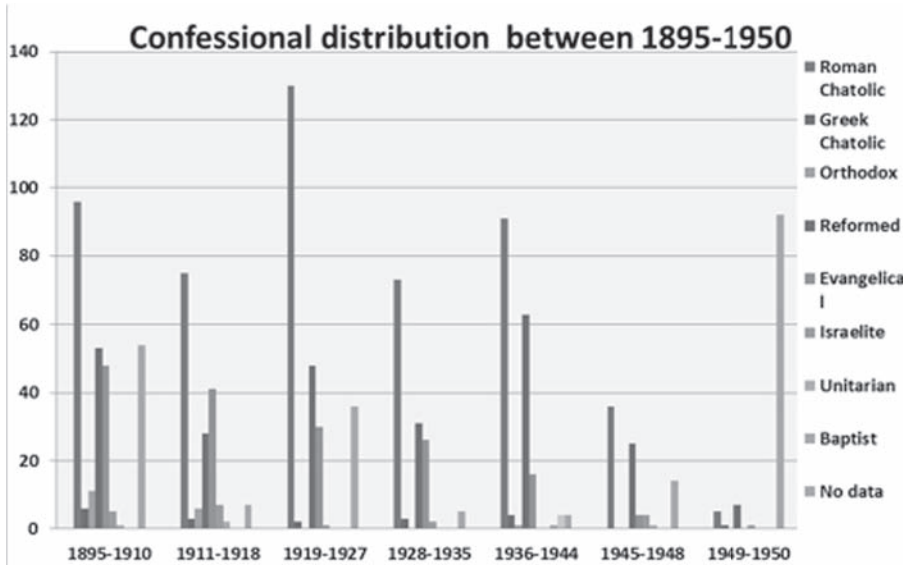


Diagram 5. The Confessional distribution between 1895 and 1950.

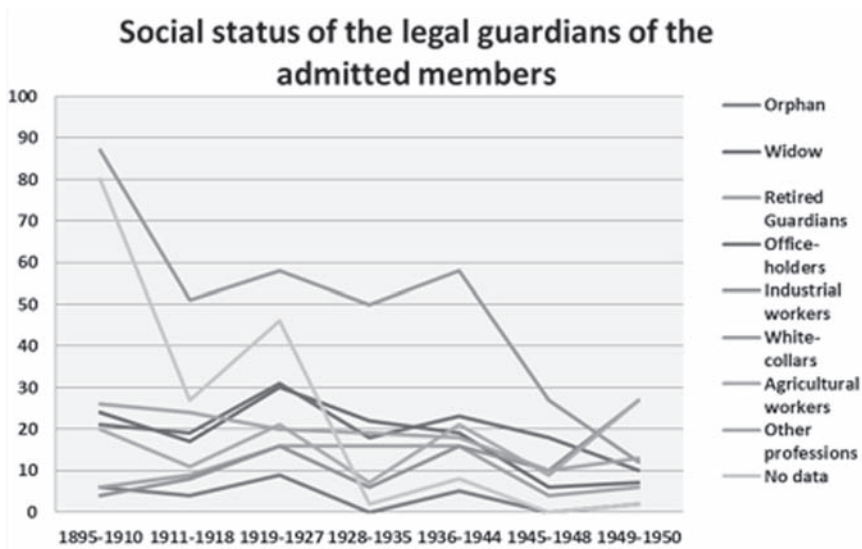


Diagram 6. The Social status of the legal guardians of the admitted members between 1895 and 1950.

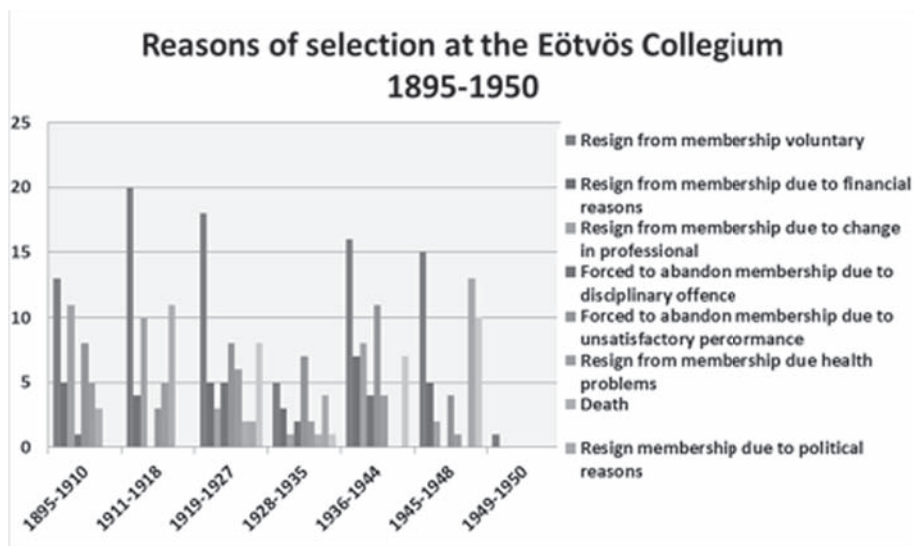


Diagram 7. Dropping out mechanism. Reasons of selection at the Eötvös Collegium between 1895 and 1950.

*Essays and
Researches*



Saggi e
Ricerche

Devozione e carità. Educazione cristiana ed edificazione dell'immagine della *Verona sancta* nel secondo Cinquecento*

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Devotion and charity. Christian education and the building of the image of 'Holy Verona' in the second half of the sixteenth century

ABSTRACT: In the process of renewal regarding Catholic Europe in the decades immediately following the Council of Trent, the numerous confraternities and charitable and welfare institutions, which animated in particular urban environments, represented the major vehicles for the sanctification of the faithful. With this in mind, the Verona of the second half of the sixteenth century appears as a unique laboratory of experiences and initiatives, which – thanks to the wise direction of Bishop Agostino Valier – offered the image of a holy city, able to develop and reinvent different Christian educational paths and one more responsive to the needs of the varied and changing secular society. Thanks to a rich repertoire of sources and the most recent scientific literature, a detailed analysis is offered of such confraternities and charitable organizations, in particular shedding light on a little-known case study which is of great interest due to its paradigmatic nature.

EET/TEE KEYWORDS: Christian Education; Educational Institutions; Welfare; Religious Organisation; Catholicism, Italy; XVI-XVII Centuries.

Nel corso del Cinquecento, com'è noto, il vivace pluralismo dell'universo associativo laicale e delle pie istituzioni caritative e assistenziali, che caratterizzava soprattutto i centri urbani, conobbe una notevole fase di rilancio

* Ringrazio Edoardo Bressan, Dario Cervato e Franco Segala per i consigli fornitimi nella fase di stesura di questo articolo.

e riorganizzazione nei paesi cattolici, protagonisti di un articolato processo di rinnovamento della vita religiosa del popolo dei fedeli, che affondava le sue radici nella precedente tradizione tardo-medievale, ma che era anche alla ricerca di soluzioni e risorse sempre più incisive e rispondenti alle specifiche situazioni di vita della multiforme società della prima età moderna¹.

Il Concilio di Trento, a questo riguardo, si era limitato a fissare alcune disposizioni di carattere generale, affidando agli ordinari diocesani la competenza giurisdizionale su «*hospitalia, collegia quaecumque ac confraternitates laicorum*», così come su «*eleemosynas, montes pietatis sive charitatis et pia loca omnia*»². Il campo d'azione era vasto e interessava una pluralità tale di istituti e centri di governo, che era alquanto difficile pensare di ridurre tutto alle dipendenze di un'unica struttura gerarchica; si trattava, al contrario, di calare la riforma all'interno di un panorama di usi e tradizioni consolidate, puntando alla razionalizzazione dell'esistente, che certamente aveva bisogno di essere inquadrato attraverso direttive generali e integrato con nuove soluzioni, ma che non poteva essere completamente destrutturato o rifondato *ex novo*³.

Da questi presupposti prese le mosse il progetto di rinnovamento della vita religiosa laicale portato avanti da Agostino Valier durante i quarantuno anni trascorsi alla guida della diocesi di Verona⁴. Egli, in perfetta continuità con

¹ Per un quadro sintetico sulle confraternite laicali e le istituzioni assistenziali-caritative, con specifico riferimento al contesto italiano di età moderna si vedano: G.G. Meersseman, G.P. Pacini, *Le confraternite laicali dal Quattrocento al Seicento*, in *Problemi di storia della Chiesa nei secoli XV-XVII*, Napoli, Dehoniane, 1979, pp. 109-136; A. Pastore, *Strutture assistenziali fra Chiesa e Stati nell'Italia della Controriforma*, e R. Rusconi, *Confraternite, compagnie e devozioni*, in *Storia d'Italia. Annali* 9; G. Chittolini, G. Miccoli (edd.), *La Chiesa e il potere politico dal medioevo all'età contemporanea*, Torino, Einaudi, 1986, pp. 433-465 e pp. 469-506; D. Zardin, *Le confraternite in Italia settentrionale fra XV e XVIII secolo*, «*Società e Storia*», n. 35, 1987, pp. 80-137; F. Black, *Italian confraternities in the Sixteenth century*, Cambridge, MA., Cambridge University Press, 1989; trad. it. *Le confraternite italiane del Cinquecento. Filantropia, carità, volontariato nell'età della Riforma e Controriforma*, Milano, Rizzoli, 1992; N. Terpstra (ed.), *The politics of ritual kinship. Confraternities and social order in early modern Italy*, Cambridge, MA., Cambridge University Press, 2000.

² *Conciliorum Oecumenicorum decreta*, a cura di G. Alberigo, G. Dovetti, P.-P. Joannou, C. Leonardi, P. Prodi, edizione bilingue, Bologna, EDB, 1991, Sessio XXII (17 sept. 1562), *Decretum de reformatione*, canon VIII-IX, p. 740.

³ Sul rapporto vescovi-confraternite si veda M.C. Rossi, *Vescovi e confraternite (secoli XIII-XVI)*, in M. Gazzini (ed.), *Studi confraternali. Orientamenti, problemi, testimonianze*, Firenze, Firenze University Press, 2009 (Reti Medievali E-Book, 12), pp. 125-165.

⁴ Agostino Valier fu vescovo di Verona dal 1565 al 1606, anno della sua morte. Per un profilo biografico del Valier si rimanda alla recente pubblicazione di G. Cipriani, *La mente di un inquisitore: Agostino Valier e l'opusculum De cautione adhibenda in edendis libris (1589-1604)*, Firenze, Nicomp, 2009. Sul suo programma pastorale e sullo stretto rapporto di amicizia e collaborazione che lo legò al card. Carlo Borromeo si veda L. Tacchella, *San Carlo Borromeo ed il card. Agostino Valier: carteggio. Prefazione di sua eminenza il cardinale Michele Browne*, Verona, Istituto per gli studi storici, 1972. Vanno segnalati, infine, i due volumi con le trascrizioni dei verbali delle visite pastorali condotte dal Valier nei lunghi anni dell'episcopato veronese: *Visite pastorali a chiese extraurbane della diocesi di Verona anni 1592-1599. Trascrizione dei Registri*

L'opera riformatrice avviata dal suo illustre predecessore Gian Matteo Giberti e contestualmente a quella realizzata da altri vescovi a lui contemporanei, si avvale della straordinaria ricchezza delle organizzazioni confraternali e pie, di antica come di recente fondazione, andando ben oltre le semplici operazioni di controllo amministrativo e i necessari adeguamenti dei vari regolamenti statutari richiesti dal Concilio. Il Valier, infatti, si impegnò attivamente per valorizzare le enormi potenzialità educative del mondo associativo devoto e caritativo, inglobandolo all'interno di un organico progetto di riorganizzazione della religiosità laicale, che mirava a raggiungere i diversi stati di vita, anche quelli in grave situazioni di disagio ed emarginazione, e che si proponeva di offrire risposte concrete ai quei bisogni di protezione, assistenza e pacificazione sociale, così come alle aspirazioni di rigenerazione morale e religiosa che animavano il frastagliato scenario della *societas christiana* post-tridentina.

1. *Per la promozione della devozione mariana ed eucaristica*

In consonanza con quanto operato da altri grandi vescovi post-tridentini, come Carlo Borromeo e Gabriele Paleotti⁵, il vescovo di Verona si impegnò nella promozione di alcune delle più nuove e incisive forme di aggregazione religiosa e devozionale del Cinquecento. Si fa riferimento, in particolare, alle Compagnie del Rosario e alle Confraternite del Corpo di Cristo (poi intitolate in epoca post-tridentina al Santissimo Sacramento) che, nate per incentivare rispettivamente la devozione mariana ed eucaristica⁶, erano molto presenti in tutto il territorio della diocesi, come confermato dalla *Relazione ad limina* del 1607, scritta a un anno di distanza dalla morte del Valier, nella quale si legge: «in presso tutte le chiese, e nelle città e fuori, avvi la Compagnia del SS. Sacramento; ed in molte quella pure della Madonna del Rosario: le quali tutte con buoni ordinamenti si reggono»⁷.

XV-XVI delle Visite Pastorali, a cura dell'Archivio Storico della Curia Diocesana di Verona, Verona, Archivio Storico Curia Diocesana, 2000 e Visite pastorali a chiese della diocesi di Verona anni 1565-1589. Trascrizione dei Registri XIII-XIV delle Visite Pastorali, a cura dell'Archivio Storico della Curia Diocesana di Verona, Verona, Archivio Storico Curia Diocesana, 2001.

⁵ Cfr. D. Zardin, *Confraternite e comunità nelle campagne milanesi fra Cinque e Seicento*, «La Scuola Cattolica», n. 112, 1984, pp. 698-732; P. Prodi, *Il cardinal Gabriele Paleotti (1522-1597)*, 2 voll., Roma, Edizioni di storia e letteratura, 1959-1967, Vol. II, pp. 187-189.

⁶ Per un quadro sulle confraternite veronesi in età moderna si rimanda ai capitoli 2 e 3 del volume di A.L. Ballin, *Soppressione delle confraternite laicali a Verona in periodo napoleonico. Prefazione di mons. Alberto Piazzi*, Verona, Della Scala edizioni, 1989.

⁷ *Dello stato della chiesa veronese nel MDCVII, relazione inedita del vescovo Alberto Valerio, pubblicata col volgarizzamento e l'illustrazione nel giorno XIX di marzo del MDCCCL in cui il Reverendo Sacerdote Cesare Ferrari celebra la sua prima messa*, Verona, Tipografia Antonelli, 1850, p. 15.

Le basi per questo straordinario sviluppo erano state create da Gian Matteo Giberti che, da un lato, aveva incentivato la presenza delle società del Corpo di Cristo e delle confraternite mariane attraverso una generosa quanto cospicua concessione di indulgenze; e dall'altro, aveva portato avanti una meticolosa attività ispettiva, condotta per tramite delle visite pastorali e volta a consolidare/riformare/accorpere i sodalizi e a creare le premesse per il loro radicamento su base parrocchiale nel contado veronese⁸.

Alle *societates Corporis Christi*, tuttavia, il Giberti aveva accordato un particolare sostegno, in quanto nelle *Costituzioni per il clero* esortava ad istituire «in ogni chiesa parrocchiale della nostra città e diocesi di Verona [...] una compagnia in onore del Santissimo Corpo del Signore Nostro Gesù Cristo»⁹. Tale disposizione, come è stato notato da Roberto Rusconi, nasceva «non tanto per surrogare una devozione cristologica al dilagante culto per santi di ogni genere, bensì per focalizzare intorno al culto eucaristico [...] una spinta alla localizzazione territoriale, se non addirittura parrocchiale, delle confraternite»¹⁰. I fedeli, in questo modo, venivano inseriti in circuiti protetti e controllati, all'interno dei quali potevano assimilare modelli di vita religiosa, che rispondevano alle esigenze episcopali di inquadramento e tutela delle masse religiose.

La prima confraternita del Corpo di Cristo fu introdotta a Verona nel 1517, per iniziativa di frate Girolamo Auricaldo degli Auricalchi dell'ordine dei Minori Osservanti¹¹, che con il supporto di Francesco Baroni, cappellano del monastero di S. Maria in Organo, aveva raccolto un primo gruppo di sodali

⁸ A. Fasani (ed.), *Riforma pretridentina della Diocesi di Verona. Visite pastorali del vescovo G.M. Giberti 1525-1542*, 3 voll., Vicenza, Istituto per le ricerche di storia sociale e di storia religiosa, 1989, Vol. I, pp. CVIII-CIX e Rossi, *Vescovi e confraternite*, cit., pp. 160-165.

⁹ Le *Costituzioni per il clero* del Giberti rappresentano il punto più alto della sua azione pastorale; furono date alle stampe per la prima volta nel 1542, seguì una seconda edizione nel 1563, che ebbe modo di circolare tra i religiosi e gli ecclesiastici riuniti a Trento per le fasi finali del Concilio. Il Valier curò una terza edizione uscita per i tipi di Girolamo Discepolo nel 1589, arricchita di alcuni paragrafi, aggiunti per adeguare il testo gibertino alle disposizioni conciliari. La *princeps* delle *Costituzioni* è ora disponibile in un'edizione moderna, da cui si cita, annotata e affiancata dalla traduzione in italiano: Gian Matteo Giberti, *Le costituzioni per il clero (1542) di Gian Matteo Giberti, vescovo di Verona. Prima edizione critica a cura di Roberto Pasquali*, Vicenza, Istituto per le ricerche di storia sociale e di storia religiosa, 2000, per la citazione tit. V, cap. 7, p. 313.

¹⁰ Rusconi, *Confraternite, compagnie e devozioni*, cit., p. 484.

¹¹ Proveniente dall'aristocrazia veronese, Girolamo Auricalco degli Auricalchi ricoprì vari incarichi all'interno dell'ordine dei minori. Nel 1517 fu nominato vicario dell'Osservanza veneta e provinciale della Dalmazia, nel 1528 fu eletto ministro della provincia veneta. Nel 1527 aveva fondato un monte di pietà a Trento e nel 1531 aveva seguito la conclusione dei lavori della fabbrica del monastero delle Clarisse della Santissima Trinità. Morì nel convento di S. Bernardino di Verona il 29 marzo 1562. Cfr. L. Wadding, *Annales Minorum seu trium Ordinum a S. Francisco institutorum*, 32 voll., Firenze, Tipografia Barbera, 1931-1964, Vol. XVI, p. 336; O. Dell'Antonio, *I frati minori nel Trentino*, Trento, Tip. interna francescani, 1947, pp. 36-39.

laici presso la chiesa dei SS. Siro e Libera¹². Dotata del suo primo statuto nel 1518 e riconosciuta ufficialmente da papa Leone X con la bolla *His quae* del 29 luglio 1521, la Confraternita segreta del Santissimo Corpo di Cristo dei Santi Siro e Libera aveva ottenuto gran beneficio dalla venuta a Verona nel 1519 del futuro fondatore dei Teatini Gaetano da Thiene, il quale non solo era entrato a far parte del sodalizio, ma si era occupato anche personalmente del suo perfezionamento¹³.

Il ruolo del Valier, successivamente, era stato decisivo per il riordinamento della vita interna della confraternita e per il suo adeguamento ai decreti tridentini. Egli era entrato a far parte del sodalizio l'11 febbraio 1578¹⁴ e aveva promosso un lavoro di revisione del vecchio statuto che si era concluso con l'elaborazione

¹² Cfr. Giovanni Battista Giuseppe Biancolini, *Notizie storiche delle Chiese di Verona* [...], 8 voll., Verona, per Alessandro Scolari al Ponte dalle Navi, 1749-1771, Vol. II, p. 714; V. Salvaro, *La Chiesa dei SS. Siro e Libera e la Ven. Compagnia in essa eretta. Memorie storiche e documenti inediti*, Verona, Prem. Stereo-Tip. vescovile in Seminario, 1882, pp. 15-19 (per la storia della Confraternita) e pp. 43-46 (per la bolla papale di approvazione); R. Lonardi, *Lo statuto della confraternita segreta del Santissimo Corpo di Cristo dei santi Siro e Libera di Verona, 1583*; Rel. Alberto Vecchi, Università degli studi di Padova, A.A. 1968/1969.

¹³ Molte informazioni circa la presenza di Gaetano da Thiene nella Confraternita segreta del Corpo di Cristo dei Santi Siro e Libera si ricavano da quanto riferito dal memoriale settecentesco compilato dal teatino veronese Giovanni Battista Barzizza. Il lavoro del religioso doveva servire per ottenere dalla Sacra Congregazione dei Riti il permesso per celebrare la messa del santo la seconda domenica di luglio nella chiesa dei Santi Siro e Libera. Si tratta di un lavoro ben documentato, che si avvale anche di fonti attualmente non più reperibili. San Gaetano entrò nella confraternita il 10 luglio 1519, per aggregare la confraternita veronese alla Compagnia segreta di San Girolamo di Vicenza, nata per opera di Bernardino da Feltre nel 1494, nella quale san Gaetano era entrato come confratello il 9 gennaio di quello stesso anno. Circa il rapporto tra la confraternita veronese e san Gaetano va precisato che, come ha rilevato Reginetta Lonato, «non sappiamo fino a che punto la presenza e l'opera di Gaetano influì sulla vita di pietà della confraternita per la mancanza di documenti in proposito», tuttavia va escluso un suo intervento nella stesura del primo statuto della Confraternita, che in realtà era stato scritto prima dell'arrivo del santo a Verona e, più precisamente, il 18 settembre 1518; un fatto, questo, che come sottolinea ancora la Lonato, è stato ignorato da molti autori, a cominciare dal Barzizza stesso, per continuare con Paschini e Pighi. Cfr. Giovanni Battista Barzizza, *San Gaetano in Verona, cioè le azioni di San Gaetano aggregato ancor prelado secolare per confratello nell'oratorio de' Santi Siro e Libera di Verona*, Mantova, s.e., 1719; P. Paschini, *Tre ricerche sulla storia della Chiesa nel Cinquecento*, Roma, Edizioni liturgiche, 1946, pp. 1-88; G.B. Pighi, *Cenni storici sulla Chiesa veronese*, 2 voll., Verona, Archivio storico Curia vescovile, 1980-1988, Vol. II, pp. 219-220; Lonato, *Lo statuto della Confraternita segreta del Santissimo Corpo*, cit., p. 81.

¹⁴ La data d'ingresso del Valier nella confraternita viene riportata da Salvaro (*La Chiesa dei SS. Siro e Libera*, cit., p. 19), il quale riferisce anche che alla morte del vescovo di Verona, avvenuta nel 1606, i membri della confraternita stabilirono, con delibera del 4 giugno di quello stesso anno, di rendergli omaggio con solenni onoranze pubbliche (*ibid.*, pp. 19, 46). Nelle carte dell'Archivio del Collegio dei Santi Siro e Libera conservate presso l'Archivio della Curia Vescovile di Verona si è trovata conferma della data d'ingresso del Valier nella Confraternita dei Santi Siro e Libera, sia nel registro *Elenco confratelli* (1517-1615), dove a c. 16v si legge: «Mons. R.mo Augustini Valerio dign.mo vescovo di Verona intrado nella compagnia n[ost]ra adi 11 febrar 1578»; sia nel *Liber in quo describuntur omnes Confratres* (1690), dove a p. 14, indicato il Valier come il confratello n. 248, si legge: «1578 / Augustins Valerius. Episcopus V[erona]e ii Februarij».

di un nuovo testo, approvato con decreto vescovile del 23 dicembre 1583¹⁵. Lo statuto valeriano della Confraternita segreta del Santissimo Corpo di Cristo dei Santi Siro e Libera non intendeva stravolgere la struttura di governo e gli obblighi morali e religiosi fissati nel vecchio statuto del 1518, ma «solamente levare [...il] superfluo o contrario alli decreti apostolici» e aggiungere quanto «fosse necessario» per il miglior funzionamento della confraternita. In particolare, lo statuto valeriano si proponeva di intervenire, da un lato, per «dar qualche riforma et accorciar alcuni ordini della Compagnia, li quali dovevano esser corretti, così per decreto del predetto Concilio di Trento»; e, dall'altro, per ripianare «qualche disparere» nato all'interno della confraternita circa l'attribuzione interna degli incarichi¹⁶.

Questi intenti, esplicitati nel decreto di approvazione del nuovo statuto, trovano conferma dall'analisi della documentazione precedente al regolamento valeriano a noi pervenuta che, in mancanza del primo statuto del 1518, consente comunque di ricavare numerose informazioni sulla vita della confraternita e di stabilire un confronto con il periodo anteriore alla riforma valeriana.

Sul piano dell'organizzazione interna lo statuto del 1583 confermava gli incarichi di cui si trova traccia nei documenti precedenti. Al vertice rimaneva un governatore, a cui era affidata la vigilanza sulla condotta di tutti i confratelli, che poteva essere anche un sacerdote, e che era coadiuvato nel suo ufficio da un vicario e da due consiglieri; vi era poi un camerlengo che prendeva nota delle entrate e delle spese della confraternita; due sacrestani che provvedevano alla manutenzione della chiesa e all'inventariazione dei beni mobili della confraternita; due infermieri addetti alla cura materiale e spirituale dei fratelli

¹⁵ Lo statuto valeriano, da cui sono tratte le successive citazioni, è conservato presso l'Archivio della Curia Vescovile di Verona (in seguito ACV), Archivio dell'Oratorio dei Santi Siro e Libera, Pacco 8, *Capitoli, esemplare ufficiale, XVI secolo*. Presso lo stesso fondo sono conservati altri sei esemplari dei *Capitoli*, di cui tre del XVII secolo, due del XVIII secolo e una del XIX secolo (cinque esemplari sono in Pacco 8 e un esemplare seicentesco in Pacco 1). Tutte le copie sono manoscritte e quelle successive all'esemplare ufficiale del XVI secolo risultano prive di due capitoli, ovvero il capitolo X della parte terza (*De le liti che nascessero fra li fratelli*) e il capitolo VI della parte settimana (*Del non mutar o alterar i capitoli*), di cui il podestà Agostino De Mula, con l'approvazione del doge Marco Antonio Memmo, aveva proposto la cancellazione nel 1614, per conflittualità con le competenze dell'autorità civile. Tale provvedimento è testimoniato da una lettera ducale datata 18 ottobre 1614, riportata in calce ad alcune copie dei *Capitoli* e presente in due copie manoscritte in: Archivio di Stato di Verona (in seguito ASV), Compagnie ecclesiastiche (città), Oratorio Santi Siro e Libera, registro n. 2 (carte non numerate). Nello stesso registro (cc. 47r-49r) è presente una copia manoscritta del decreto di riforma dei *Capitoli* del vescovo Agostino Valier del 23 giugno 1583, da cui si cita, e una a stampa più tarda, risalente al XVIII secolo. Per una lettura integrale dei documenti si veda Lonato, *Lo statuto della Confraternita segreta del Santissimo Corpo*, appendice documentaria; mentre per una ricostruzione delle vicende occorse all'antico archivio della Confraternita dei Santi Siro e Libera si rimanda a G. Marchini, *La chiesa dei SS. Siro e Libera al teatro Romano dopo il decreto napoleonico di soppressione (25 luglio 1808)*, «Vita Veronese», n. 7-8, 1972, pp. 231-240.

¹⁶ ASV, Compagnie ecclesiastiche (città), Oratorio Santi Siro e Libera, registro n. 2, *Decreto di riforma del vescovo Agostino Valier*, c. 47v.

infermi; e, infine, un maestro dei novizi che aveva il delicato compito di «drizzarli novizzi nella strada del Signore»¹⁷. Anche la durata in carica dei «superiori et ufficiali de la compagnia», passata da quattro a sei mesi proprio poco prima dell'emanazione dello statuto approvato dal Valier, era confermata¹⁸. La novità più significativa introdotta nel documento valeriano era legata alla figura del padre confessore, che non era più 'concesso' dai Minori Osservanti, ma che poteva essere, più in generale, «un sacerdote di gran bontà et di lettere, secolare o religioso», a condizione però – aspetto questo affatto secondario – che ottenesse l'approvazione del vescovo¹⁹.

Lo statuto del 1583 manteneva invariato anche l'*iter* previsto per l'accettazione dei nuovi confratelli, che era costituito da diverse fasi. Superato l'esame dei superiori (governatore, vicario e consiglieri), infatti, si entrava in un periodo di prova di tre mesi che, previa approvazione dei membri votanti della confraternita, era seguito da un anno di noviziato, trascorso il quale, il novizio, «una volta ballottato et havendo li due terzi de le voci»²⁰, poteva divenire membro a pieno titolo della confraternita. Va anche detto che, se il percorso di ingresso nella confraternita era lungo e rigoroso, ad esso potevano accedere persone di qualsiasi condizione sociale, purché «di buona

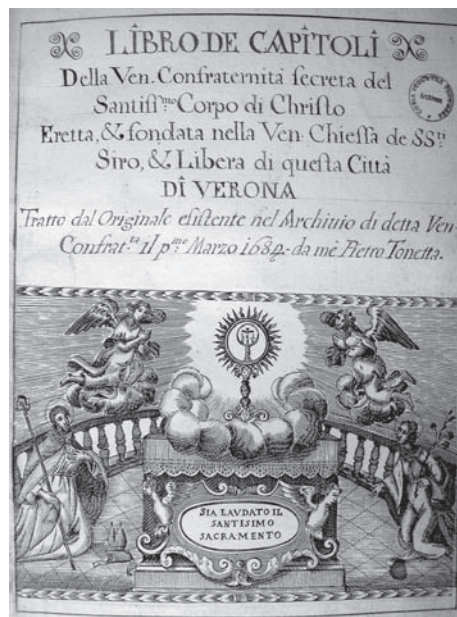


Fig. 1. Frontespizio del volume manoscritto *Libro de Capitoli della Ven. Confraternita secreta del Santissimo Corpo di Christo, eretta et fondata nella venerabile Chiesa dei SS. ti Siro et Libera, di questa città di Verona, tratto dall'originale esistente nell'Archivio di detta Ven. Confrat.ta il p.mo 1684 da me Pietro Tonetta* (Archivio della Curia Vescovile di Verona, Archivio dell'Oratorio dei Santi Siro e Libera, Pacco 8; foto a cura dell'A.).

¹⁷ ACV, Archivio dell'Oratorio dei Santi Siro e Libera, Pacco 8, Capitoli, esemplare ufficiale, XV secolo, parte quarta, cap. VI: Del Maestro dei novizi et del suo ufficio, p. 13.

¹⁸ ACV, Archivio dell'Oratorio dei Santi Siro e Libera, *Coppia del libro [...] dell'elettioni delli ufficiali [...] (1517-1615)*. Il passaggio della durata della carica degli ufficiali da quattro a sei mesi, risulta per la prima volta a c. 55v: «1582 / Martedì Adi 25 di D.re / Ufficiali fatti per sei mesi cioè da genn.o 1583 sino a tutto giug.o 1583». Dunque, si tratta di un provvedimento che era stato preso prima dell'entrata in vigore dello statuto valeriano, avvenuta con decreto del 23 giugno 1583.

¹⁹ ACV, Archivio dell'Oratorio dei Santi Siro e Libera, Pacco 8, Capitoli, esemplare ufficiale, XV secolo, parte quarta, cap. II: *Del confessore et del suo ufficio*, p. 12.

²⁰ *Ibid.*, parte sesta, cap. IV: *De lo stabilimento de novizzi ne la compagnia*, p. 20.

fama et di buona vita et di età almeno di anni 20»²¹: queste erano le uniche condizioni per presentare la propria ‘candidatura’.

Il culto eucaristico ovviamente rimaneva lo scopo principale della confraternita; si confermava l’obbligo della congregazione domenicale dei confratelli per pregare, recitare l’ufficio e confessare pubblicamente le proprie colpe; restava altresì l’obbligo della confessione e comunione mensile, delle preghiere di suffragio per i fratelli defunti e della partecipazione alle principali festività del calendario liturgico. La vera ed importante novità introdotta dallo statuto del 1583 consisteva nella sostituzione della pratica della disciplina, documentata dall’inventariamento di strumenti di penitenza nel *Libro deli aventari (1529-1609)*²², con quella dell’orazione mentale: «mentre li fratelli si congregano, se vi sarà tempo, il governatore li potrà trattenere col dir le litanie secondo l’uso della compagnia; dopo le quali – si legge nel regolamento valeriano – si faccia almeno per spacio d’uno quarto d’hora oratione mentale sopra qualche punto proposto dal detto governatore»²³. In questo modo, veniva rafforzato il ruolo primario della preghiera, nella forma orale e mentale, quale strumento primo di quel processo di interiorizzazione della devozione eucaristica che doveva arrivare a permeare la vita di ogni confratello fino a toccare le corde più profonde dell’anima.

L’opera di riordino della Confraternita segreta del Santissimo Corpo di Cristo dei Santi Siro e Libera portata avanti dal Valier, rappresentava certamente un ulteriore passo in avanti nel processo di promozione del culto eucaristico, ma non fu l’unica iniziativa promossa dal vescovo di Verona in questa direzione. Egli, ad esempio, non mancò di favorire l’antica e fastosa processione cittadina del *Corpus Domini*; grandiosa esplicitazione corale del culto eucaristico che animava annualmente – da almeno due secoli – le più importanti contrade e chiese di Verona, unendo tutti i principali corpi sociali cittadini in un unico afflato devozionale²⁴. Non va dimenticato, poi, che il Valier si fece promotore

²¹ *Ibid.*, parte sesta: cap. I: *De li novizzi et prima de le condizioni che debbono havere*, p. 19.

²² A questo riguardo, ad esempio, nell’inventario dei beni della Compagnia del 1535, sotto al paragrafo VI, intitolato *Nel logo fora della Sacristia*, si legge: «Doe cassetini, neli quali si governano le discipline». ACV, Archivio dell’Oratorio dei Santi Siro e Libera, *Libro deli aventari (1529-1609)*, reg. n 44, c. 6v.

²³ ACV, Archivio dell’Oratorio dei Santi Siro e Libera, Pacco 8, *Capitoli, esemplare ufficiale, XV secolo*, parte seconda, cap. I: *De li esercitii spirituali et altre cose che si hanno da fare nell’oratione et prima de l’oratione mentale*, p. 3.

²⁴ La festa del *Corpus Domini* era celebrata a Verona sin dai primi anni del XIV secolo e, forse, come ha ipotizzato Antonio Spagnolo, le sue origini si possono far risalire addirittura alla seconda metà del XIII secolo. Le prime informazioni sulla processione del *Corpus Domini*, invece, risalgono al XV secolo. La processione seguiva un giro molto lungo, che coinvolgeva tutte le aree più importanti della città e che, come da prassi, rispettava un rigoroso cerimoniale. Il corteo era introdotto dalle corporazioni di mestiere, seguivano le *scolae puerorum* e i *loca pia* (Mendicanti, Derelitti, Pupilli, Fanciulli della *Domus Pietatis*), accompagnate dalle *scolae disciplinatorum et batutorum*; si continuava con tutte le confraternite della città, con il clero regolare e secolare e si chiudeva la processione con il vescovo che portava il Santissimo Sacramento. È interessante notare,

della fondazione del Compagnia delle Quarantore, nata al tempo della guerra di Cipro per supportare con la preghiera le milizie della Repubblica di Venezia impegnate contro l'Impero Ottomano e divenuta, successivamente, uno dei principali centri propulsori della devozione cristocentrica nella città di Verona²⁵.

Dalla *Compendiosa istruzione dell'origine, fondazione e progressi del ven. Collegio della Santiss. Orazione delle Quarant'Ore* si apprende che il Valier era stato incoraggiato in questa 'impresa' dall'amico, nonché modello e fonte d'ispirazione costante nell'esercizio del suo governo episcopale, Carlo Borromeo. L'approvazione canonica era stata concessa dal vescovo di Verona il 2 ottobre 1571 e, poco dopo, più precisamente all'indomani della vittoria cristiana della celebre battaglia di Lepanto, i confratelli avevano messo mano ai *Capitoli* della Compagnia, riordinandoli e indicando proprio il Valier tra i protettori, «in terzo luogo», appena dietro la Vergine, «primaria protettrice» e «tutti li santi e sante della corte del cielo»²⁶. La devozione eucaristica nel sodalizio, a cui era stata assegnata come sede la chiesa di S. Luca²⁷, era incentrata sulla pratica dell'orazione delle quarantore, che si teneva quattro volte all'anno e che, a partire dalla settimana santa del 1587 – grazie all'intervento del predicatore cappuccino Mattia Bellintani –, divenne protagonista per la prima volta di una grandiosa esperienza di devozione collettiva destinata ad avere largo seguito²⁸.

Non si può mancare di sottolineare come la vittoria di Lepanto del 7 ottobre 1571, attribuita all'intercessione della Vergine, aveva rappresentato un eccezionale volano per rinsaldare la fede del popolo cristiano e, soprattutto, per rilanciare la diffusione della devozione mariana che, declinata in diverse associazioni confraternali – dalle confraternite del Rosario, opera soprattutto dei Domenicani, alle congregazioni mariane, promosse dai Gesuiti –, nel corso dell'ultimo decennio del Cinquecento arrivò a «coprire in maniera pressoché integrale l'intera penisola»²⁹. Verona in questo non fece eccezione.

a questo riguardo, che nell'elenco delle confraternite che prendevano parte alla processione non è inclusa la Confraternita del Santissimo Corpo di Cristo dei santi Sito e Libera, a conferma del fatto che il culto eucaristico da esso promosso era portato avanti solo all'interno del sodalizio. Cfr. A. Spagnolo, *La processione del Corpus Domini in Verona ne' secoli XV-XVIII: dissertazione storico-liturgica*, Verona, Stab. Tipo-Lit. G. Franchini, 1901.

²⁵ *Compendiosa istruzione dell'origine, fondazione e progressi del ven. Collegio della Santiss. Orazione delle Quarant'ore nella ven. chiesa Corpus Domini già di S. Lucia di Verona*, In Verona, per Francesco Rossi, Stampator à S. Eufemia, 1695, pp. XI-XIII.

²⁶ *Ibid.*, p. XIII.

²⁷ Biancolini, *Notizie storiche delle Chiese di Verona*, cit., Vol. III, pp. 47-48.

²⁸ Alessandro Canobbio, *La divota oratione delle quaranta hore fatta nella città di Verona la settimana santa dell'anno MDLXXXVII, così persuasa dal M.R.P.F. Mattia Bellintani da Salò Capuccino. Con la distribuzione delle hore per gli huomini la notte, et per le donne il giorno, distinte a contrada*, In Verona, per Girolamo Discepolo, 1587.

²⁹ Cfr. M. Rosa, *Pietà mariana e devozione del Rosario nell'Italia del Cinque e Seicento*, in Id., *Religione e società nel Mezzogiorno tra Cinque e Seicento*, Bari, De Donato, 1976, pp. 217-243; L. Châtellier, *L'Europe des dévots*, Paris, Flammarion, 1987; trad. it. *L'Europa dei devoti*, Milano, Garzanti, 1988; Rusconi, *Confraternite, compagnie e devozioni*, cit., pp. 492-494 (per la

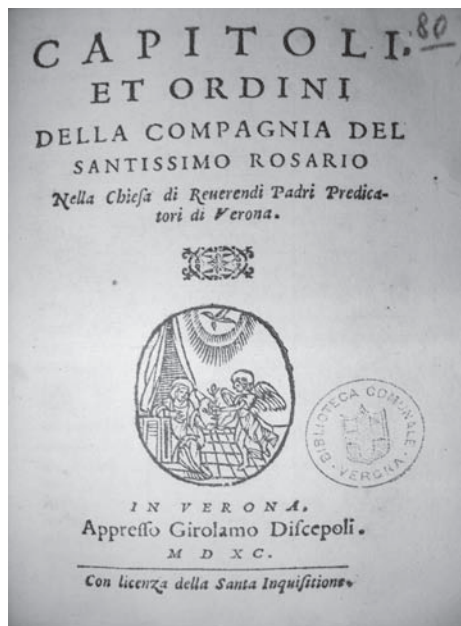


Fig. 2. Frontespizio del testo *Capitoli et ordini della Compagnia del Santissimo Rosario nella chiesa di Reverendi Padri Predicatori di Verona*, In Verona, appresso Girolamo Discepolo, 1590 (Biblioteca civica di Verona, collocazione: c.v.8; foto a cura dell'A.).

In particolare, va ricordato che la devozione del Rosario era stata introdotta nell'antica città scaligera dai domenicani, a cui era stata affidata la chiesa di S. Anastasia di Verona sin dal 1260. Purtroppo non si hanno informazioni precise sull'erezione della Confraternita del Rosario di Verona, tuttavia per tramite dello storico della Chiesa veronese Giovanni Battista Biancolini sappiamo che nel 1585 furono avviati i lavori per la costruzione della Cappella della Beata Vergine del Rosario nella chiesa di S. Anastasia, poi ultimati nel 1596. Del fatto che questi furono anni centrali per il consolidamento del sodalizio si trova conferma dalla lettura dei *Capitoli et ordini della Compagnia del Santissimo Rosario della magnifica Città di Verona*, pubblicati nel 1590 dallo stampatore episcopale Girolamo Discepolo³⁰. Il testo usciva a qualche anno di distanza dai *Capitoli, statuti et ordinationi della venerabile Compagnia del Santissimo*

Rosario fondata nella chiesa di Santa Maria della Minerva di Roma, che avevano registrato un'ampia circolazione tra le confraternite del Rosario presenti nel territorio italiano, assumendo una chiara funzione paradigmatica³¹; una funzione che sembra trovare conferma nella premessa ai *Capitoli* veronesi,

citazione p. 493).

³⁰ *Capitoli et ordini della Compagnia del Santissimo Rosario nella chiesa di Reverendi Padri Predicatori di Verona*, In Verona, appresso Girolamo Discepolo, 1590.

³¹ *Capitoli, statuti et ordinationi della venerabile Compagnia del Santissimo Rosario, fondata nella chiesa di Santa Maria della Minerva l'anno 1481, quali saranno anco comuni alla Compagnia del Santissimo Nome d'Iddio [...] fatti et novamente revisti dal Reverendissimo padre Generale dell'Ordine de Predicatori [...] conforme à quelli Capitoli si dovranno governare ancora tutte l'altre Compagnie dell'istesso Santissimo Rosario, et Nome d'iddio, poste in qualsivoglia luogo*, In Roma, ad istanza della Compagnia del SS. Rosario, per gli heredi d'Antonio Blado, Stampatori Camerali, 1585. Il ruolo esemplare di questi Capitoli, già sottolineato nello stesso titolo, è ulteriormente esplicitato nella lettera di prefazione, firmata da fra Sisto Fabri e datata 1° ottobre 1585, nella quale si legge: «commandiamo, che per l'avenire in tutti luoghi, dove si trova, o in successo di tempo si troverà detta Compagnia del Santissimo Rosario, siano tenuti, et obligati li Confrati di quella regularsi, et governarsi secondo questi presenti capitoli, regole, e statuti che si sottogiongono, con li quali ancora si regola, et governa la Compagnia del Santissimo Rosario fondata in Roma nella nostra Chiesa di Santa Maria sopra Minerva».

laddove illustrando le motivazioni che avevano determinato la loro scrittura, si afferma: «Ma perché per prova s'è conosciuto che oltre le regole generali, con le quali si reggono tutte le altre simili congregazioni sparse in tutto il mondo, al ben essere et perfezione sua [cioè della Compagnia del Rosario di Verona] era necessario formare anco di proprie et particolari, con l'osservanza delle quali potesse più efficacemente dar opera alli suoi divoti essercitii»³².

Dunque, i *Capitoli et ordini della Compagnia del Santissimo Rosario della magnifica Città di Verona* nascevano proprio per fornire un modello unitario ai vari sodalizi presenti nel territorio della diocesi, per stabilire dei punti di riferimento comuni tra essi e ribadire il ruolo centrale svolto dalla Compagnia eretta nella chiesa di Sant'Anastasia, ben rappresentato nelle funzioni attribuite al cancelliere:

Finalmente – si legge nei *Capitoli* – sarà suo ufficio lo scriver spesse volte lettere alle Compagnie del Santissimo Rosario, che sono ò saranno nelle ville del Territorio Veronese, raccordando loro li grandissimi doni et gratie concesse à simili Compagnie, et pregarà anco li Reverendi sacerdoti loro Arcipreti, et Curati ad essortar caldamente ogn'uno a non perder così gran tesori, et massimamente alla frequenza delli Santissimi Sacramenti et delle processioni nelle feste solenni della gloriosa Vergine nostra Avvocata: et manderà a ciascuna di dette Compagnie uno di questi libretti [il riferimento è ovviamente ai *Capitoli et ordini della Compagnia*], accioche sappiano meglio quale sia l'obbligo suo, et lo possano mettere in essecutione³³.

Il brano conferma il radicamento su base parrocchiale delle compagnie del Rosario veronesi e il fatto che i legami associativi non erano basati solo sulla partecipazione a un cospicuo 'tesoro' di indulgenze, ma anche su pratiche devozionali comuni: dalla frequenza ai sacramenti, passando per la recita del rosario (non più in forma individuale), fino alle processioni della Compagnia, stabilite «nelle prime domeniche d'ogni mese [...], et in particolare nelli giorni solenni della Natività, Annunciatione, Purificatione, et Assontione della Gloriosiss. Vergine, et nella prima domenica del mese di Ottobre, la quale – si precisa nei *Capitoli* – è la principal festa del Santissimo Rosario»³⁴. In tal modo venivano posti i presupposti, come è stato notato, per «una rinnovata presenza nel rituale pubblico» della devozione rosariana e per la sua successiva «diffusione di massa»³⁵. Non stupisce, allora, osservare che la città di Verona qualche anno più tardi, e più precisamente nel 1630, straziata dalla peste, sceglieva di eleggere come sua protettrice proprio la beata Vergine del Rosario³⁶. Un dato, questo, che conferma come, nel corso del Seicento, la devozione rosariana ebbe modo di consolidarsi in tutta Europa registrando «una fortuna tale da – osserva

³² *Capitoli et ordini della Compagnia del Santissimo Rosario [...] di Verona*, cit., c. 2v.

³³ *Ibid.*, cc. 7v-8r.

³⁴ *Ibid.*, c. 5r.

³⁵ Rusconi, *Confraternite, compagnie e devozioni*, cit., p. 494.

³⁶ Biancolini, *Notizie storiche delle Chiese di Verona*, cit., Vol. II, pp. 561-562.

Zardin – mettere in discussione il primato pressoché generale delle confraternite eucaristiche»³⁷.

Al di là delle diverse vicende che determinano la nascita di questi sodalizi e del primato riconosciuto alla devozione eucaristica, che sembra rispondere in maniera più efficace alle esigenze di risanamento delle basi della Chiesa locale, lo sviluppo che interessò nel corso del Cinquecento le compagnie del Rosario e le confraternite del Santissimo Sacramento – analogamente a quanto accadeva in altre diocesi italiane del tempo – muoveva dalla volontà di favorire tra i laici la comunione frequente e la preghiera, la meditazione sul rosario o la devozione dei sacramenti, attraverso confraternite che, fortemente radicate nelle strutture parrocchiali, aperte ad uomini e donne, sostenute dal clero regolare e secolare, caratterizzate da fastosi rituali processionali, e – non da ultimo – ampiamente favorite dal vescovo, apparivano come i principali strumenti per canalizzare e plasmare le pratiche religiose dei laici e realizzare la presenza della Chiesa nella società³⁸. La condivisione di pratiche religiose, la scelta di una devozione specifica, l'accesso a comuni patrimoni di indulgenze, i vincoli di reciproca solidarietà tra i sodali, l'elezione collegiale periodica degli organi di governo e i legami con il contesto parrocchiale: ogni confratello era inquadrato in un disegno disciplinatore fatto di regole e gesti da assimilare attraverso un preciso percorso di apprendistato, che veniva rivitalizzato dalla reciproca imitazione tra sodali e che andava riconfermato nella condotta quotidiana, nell'intimità dell'ambito domestico così come all'interno della comunità circostante.

Indubbiamente per il Valier e, più in generale, per i vescovi post-tridentini, il mondo delle confraternite costituiva un terreno fertile sul quale investire nuove energie per la promozione di modelli di 'vera e perfetta' vita cristiana, ma che necessitava anche di una chiara regolamentazione, per porre un argine a quelle tendenze di chiusura verso l'esterno e di proliferazione indiscriminata che, di fatto, limitavano notevolmente tutto il loro straordinario potenziale pedagogico. Importanti presupposti per arginare questi 'pericoli' erano già stati stabiliti dal Giberti. Egli, infatti, nelle *Costituzioni per il clero* inseriva uno specifico capitoletto nel quale proibiva l'istituzione di nuove confraternite senza il consenso del vescovo³⁹ e, al fine di fornire chiare direttive sulla loro gestione e sui principi guida che le dovevano accomunare, nel 1540 aveva dato alle stampe i *Capitoli ordinati per monsignor il vescovo di Verona per governo delle compagnie e confraternità di tutta la diocesi sua*⁴⁰. Si tratta di un

³⁷ Zardin, *Le confraternite in Italia settentrionale*, cit., p. 116.

³⁸ A questo riguardo si vedano le osservazioni formulate da Black, *Le confraternite italiane del Cinquecento*, cit., pp. 48-51.

³⁹ Giberti, *Le costituzioni per il clero*, cit., tit. II, cap. 44, p. 161.

⁴⁰ *Capitoli ordinati per Monsignor il Vescovo di Verona per governo delle Compagnie, et confraternita in tutta la Diocesi sua, quali Sua S. vole inviolabilmente essere osservati sotto pena di esser cassato et privato di dette compagnie et confraternita ad ogni uno che serà inobediente*, In Verona, per Antonio Putelletto da Portese, 1540. Cfr. Prosperi, *Tra evangelismo e Controriforma*,

testo normativo di grande rilievo, nel quale si possono rintracciare i punti di riferimento chiave dell'azione di governo che avrebbe portato avanti il Valier sul fronte dell'associazionismo laicale veronese.

Nei *Capitoli* gibertini si sottolinea la centralità della parrocchia quale fulcro della vita religiosa del popolo dei fedeli, assegnando al parroco la supervisione sulle decisioni ed azioni delle confraternite. Ma il testo, oltre a dare disposizioni di carattere 'istituzionale', forniva anche indicazioni attinenti al piano delle comuni finalità delle confraternite, indicando la *caritas* come il principio guida al quale guardare per superare ogni sterile particolarismo settoriale e per aprirsi all'esterno con atteggiamento di accoglienza e condivisione, capace di andare oltre le appartenenze sociali, familiari e corporative. «Si ricorderanno all'ultimo quelli delle fraternite e compagnie – si legge nel regolamento gibertino – che hanno tutti per fratelli e che non sono solamente obbligati a procurar il bene corporale e maggiormente spirituale di quelli della fraternità, ma di tutti li cristiani»⁴¹. Il messaggio è chiaro: vanno dilatati quei vincoli di solidarietà e mutuo soccorso che uniscono di norma i membri di una stessa confraternita, e proiettati verso l'intero corpo sociale, senza limitazioni, riconoscendo in esso un'unica *universitas* cristiana, espressione di un'unica *Ecclēsia*. Suffragi, preghiere, «elemosine et altre opere bone» – si continua nel testo gibertino – non sono beni da custodire gelosamente e da riservare esclusivamente a «padri, parenti et amici et altri quali amamo terrenamente», al contrario con le «cose di Dio» vale il principio per cui «quanto più diamo alli altri, et facciamo per amore et charità le cose communi, tanto più ne tocca a noi et a tutti»⁴².

Su questa idea di *caritas* compartecipata, che unisce in uno scambio dialettico chi dona e chi riceve, il Valier, debitore ma anche brillante interprete del disegno gibertino, incentrerà il suo progetto di riordino e rimodellamento della vita religiosa laicale, servendosi di quell'articolata compagine di enti, gruppi e confraternite vere e proprie, preposte alla gestione del sistema caritativo-assistenziale veronese. Infatti, accanto alle confraternite fin qui descritte, che operavano sul terreno del culto e della pura devozione, caratterizzate da un impianto più tradizionale e, se vogliamo autoreferenziale, si profilava per il Valier un ambito di intervento vasto e ricco di potenzialità educative, come quello della carità pubblica, affidata a consorzi/organismi cittadini e a confraternite caratterizzate da una spiccata vocazione assistenzialistica. Si trattava di un

cit., p. 272; D. Zardin, *Riscrivere la tradizione. Il mondo delle confraternite nella cornice del rinnovamento cattolico cinque-seicentesco*, in Gazzini (ed.), *Studi confraternali*, cit., pp. 166-213 in particolare pp. 205-206; Id., *Istanze universaliste e particolarismo corporativo nelle confraternite dell'età moderna*, in S. Pastore, A. Prosperi, N. Terpstra (edd.), *Brotherhood and Boundaries. Fraternità e barriere*, Pisa, Edizioni della Normale, 2011, pp. 569-592, in particolare pp. 585-586.

⁴¹ *Capitoli ordinati [...] per governo delle Compagnie, et confraternita in tutta la Diocesi*, cit., c. 479r.

⁴² *Ibid.*, c. 479v.

settore di difficile e complessa gestione, soprattutto per via del forte substrato di tradizioni preesistenti e per la pluralità di attori sociali coinvolti, ma che consentiva anche di definire e rinnovare modelli pedagogici, capaci di inquadrare tutte quelle situazioni di marginalità e disagio che non potevano essere escluse da un progetto pastorale che aspirava ad essere omnicomprensivo. Al centro di questo scenario di intervento si poneva la celebre Compagnia della Carità, creazione anch'essa di Gian Matteo Giberti, ma divenuta vero e proprio fulcro del sistema di beneficenza pubblica veronese per opera di Agostino Valier.

2. «*Questa Opera santa della Charità in Verona è madre e regina di tutte le altre opere pie*»⁴³

La Compagnia della Carità era stata istituita dal Giberti fin dal 1530, per provvedere al bene materiale e spirituale dei poveri della sua diocesi⁴⁴. Un primo regolamento del sodalizio era stato messo a punto nel 1538, ma la versione ufficiale, fatta poi divulgare dal Giberti per tutta la diocesi, ottenne l'approvazione delle magistrature cittadine l'11 maggio 1539⁴⁵. Il Valier rielaborò ed integrò significativamente il regolamento gibertino attenendosi a criteri di maggior efficienza e praticità, e diede alle stampe il nuovo testo nel

⁴³ *Institutione dell'opera della carità di Verona introdotta al tempo del reverendiss. Giberto, et ordini per la conservazione, et accrescimento della detta opera, aggiunti da Monsig. Reverendiss. Agostino Valerio Vescovo presente*, In Verona, per Sebastian, et Giovanni dalle Donne fratelli, 1578, c. 22r.

⁴⁴ Per un breve profilo sulla Compagnia della Carità si vedano: O. Viviani, *Note su G.M. Giberti e i primi capitoli della Societas caritatis*, «Atti e memorie della Accademia di Agricoltura, Scienze e Lettere di Verona», s. 6, vol. 2, 1950-1951, pp. 177-186; A. Fasani (ed.), *Riforma pretridentina della diocesi di Verona. Visite pastorali del vescovo G.M. Giberti (1525-1542)*, 3 voll., Vicenza, Istituto per le ricerche di storia sociale e di storia religiosa, 1989, Vol. I, pp. cxxiii-cxxxv; V. Fanelli, *Storia degli ospedali di Verona dai tempi di San Zeno ai giorni nostri*, Verona, Istituti ospedalieri, 1962, pp. 182-184.

⁴⁵ La prima versione dei *Capitoli* della Compagnia della Carità fu approvata dal consiglio cittadino il 16 aprile 1538 ed è riportata in appendice al contributo di O. Viviani, *Note su G.M. Giberti*, cit., pp. 185-186. Ai *Capitoli della società della Carità istituita da Gianmatteo Giberto vescovo di Verona fatti dallo stesso deputati, e presentati da Pietro Dante Alighieri Provveditore nel Consiglio di questa città per essere confermati li 11 maggio 1539*, faceva seguito l'*Editto de' rettori in favor di questa Compagnia* emanato nel gennaio del 1540; di entrambi i documenti sono stati consultati i testi presenti in Gian Matteo Giberti, *Jo. Matteaei Giberti episcopi veronensis Ecclesiasticae [...] Opera nunc primum collecta, et ineditis eiusdem opuscoli aucta, celeberrimi auctoris vita, dissertatione, variisque monumentis illustrata et sub auspiciis [...] Joannis Bragadeni Veronae episcopi edita*, Hostiliae, apud Augustinum Carattonium, 1740, pp. 228-231. Va ricordato, infine, che il Giberti diede un ulteriore contributo al consolidamento della Compagnia della Carità, dedicando ad essa uno specifico capitolo delle *Constitutiones*, nel quale incoraggiava la diffusione e il supporto economico del sodalizio in tutta la sua diocesi. Cfr. Giberti, *Costituzioni*, cit., tit. V, 314-317.

1578, sotto il titolo di *Institutione dell'opera della carità di Verona introdotta al tempo del reverendiss. Giberto, et ordini per la conservazione, et accrescimento della detta opera, aggiunti da Monsig. Reverendiss. Agostino Valerio Vescovo presente*⁴⁶.

Nello specifico, il vescovo di Verona si preoccupò di rafforzare la struttura organizzativa, affiancando al priore della Compagnia dodici rettori con incarico annuale, stabilendo una cadenza mensile per le riunioni generali della Compagnia ed, infine, valorizzando la figura dei visitatori. Anche questi ultimi, come nel caso delle altre cariche di rilievo della confraternita, erano eletti annualmente; il Valier confermava lo statuto del Giberti e disponeva la presenza di due visitatori per ogni contrada, affidando ad essi il compito di raccogliere informazioni sulle specifiche necessità dei poveri e dei malati, «così d'huomini, come di donne», della contrada loro affidata. Le situazioni da registrare potevano essere tra le più varie e il regolamento valeriano accenna ad una casistica molto ampia che accoglieva al suo interno, in primo luogo, quei «poveri vergognosi» che un tempo vivevano in condizioni agiate e che ora andavano aiutati con discrezione al fine di preservare il loro onore⁴⁷, ma anche quelle persone che si trovavano

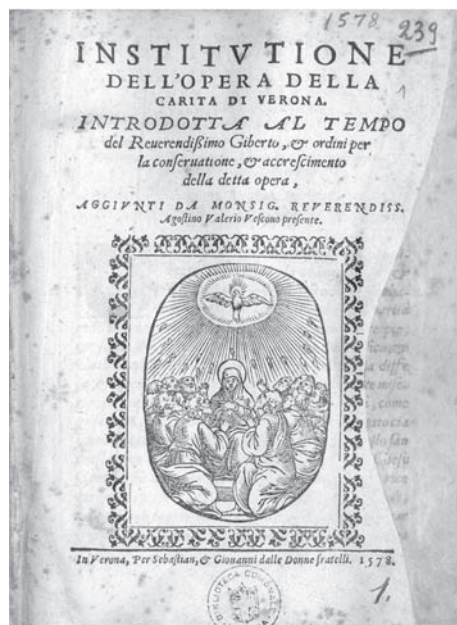


Fig. 3. Frontespizio del testo *Institutione dell'opera della carità di Verona introdotta al tempo del reverendiss. Giberto, et ordini per la conservazione, et accrescimento della detta opera, aggiunti da Monsig. Reverendiss. Agostino Valerio Vescovo presente*, In Verona, per Sebastian, et Giovanni dalle Donne fratelli, 1578 (Biblioteca civica di Verona, collocazione: c.v.244; foto a cura dell'A.).

⁴⁶ *Institutione dell'opera della carità di Verona*, cit., c. 5r.

⁴⁷ *Ibid.*, c. 2v. A proposito dei poveri vergognosi, Black ha sottolineato come sia difficile trovare documenti che consentano di definire con precisione gli appartenenti a questa categoria, per via della riservatezza che veniva tenuta nel prestare loro soccorso. Ad essa certamente appartenevano i nobili decaduti, ma in alcuni casi vi rientravano anche persone di umili condizioni, artigiani e donne (magari senza una protezione maschile), che volevano tenere nascosta la propria situazione di indigenza, per mantenere alto lo stato di onorabilità di cui godevano all'interno della società. L'uso dell'espressione 'poveri vergognosi' è attestato sin dall'inizio del XIV secolo, ma viene ad essere impiegato in modo sistematico nel Cinquecento, per distinguerlo da altre categorie di poveri, come quelle dei 'poveri mendicanti' o dei 'poveri derelitti', spesso utilizzate per denominare istituzioni fondate per dare loro accoglienza. Cfr. Black, *Le confraternite italiane del Cinquecento*, cit., pp. 196-200; Zardin, *Le confraternite in Italia settentrionale*, cit., p. 104; B. Pullan, *Poveri, mendicanti e vagabondi (secoli XIV-XVII)*, in *Storia d'Italia. Annali I*: R. Romano, C. Vivanti

per le contrade «con la notte adosso, et senza ricapito», che andavano inviati «con uno boletino ad uno delli Hospedali, che suol dare allogiamento»; e comprendeva anche quei «pupilli, o pupille, che siano di quelli, che si habbino ad accettar nelle opere», così come le donne «che dal malfar si vogli convertire à viver bene». Non si trascurava, naturalmente, neanche il problema degli «infermi»; infatti, il regolamento stabiliva che i membri della Compagnia avevano il dovere di procurare le cure mediche necessarie a quelle persone che non potevano provvedervi in modo autonomo, ricordando però che il loro primo obbligo atteneva alla confessione del malato, «essendo di più momento l'infermità dell'anima che quella del corpo»⁴⁸.

Il mondo dei 'marginali' veronesi, come si evince dall'ampia casistica di *pauperes* assistiti dalla Compagnia della Carità, era vasto e molto stratificato e rifletteva una situazione molto simile a quella di tante altre città dell'Europa moderna. L'analisi condotta da Paola Lanaro Sartori, infatti, ha mostrato come nella Verona della seconda metà del XVI secolo erano ben riconoscibili le tre categorie di poveri proposte da Brian Pullan: i *poveri non indigenti*, vale a dire i piccoli artigiani, gli impiegati pubblici di rango inferiore e i piccoli commercianti; i *poveri congiunturali o indigenti*, ovvero tutti i lavoratori umili, dai braccianti ai piccoli artigiani, la cui sussistenza dipendeva unicamente dal lavoro giornaliero e dal salario, caratteristica che impediva qualsiasi forma di risparmio e che rendeva questa categoria estremamente vulnerabile, soprattutto in concomitanza di carestie e congiunture economiche che determinavano l'aumento del prezzo del grano; infine, i *poveri strutturali*, cioè tutte quelle persone invalide, malate o inferme di mente, inabili al lavoro, ma anche le donne nubili e le vedove, i bambini e i vecchi privi di una rete familiare di supporto e incapaci a procurarsi da vivere e, più in generale, tutte le persone la cui sopravvivenza dipendeva esclusivamente dall'elemosina e dalle iniziative caritative-assistenziali promosse nella città⁴⁹.

Alla luce di questo contesto così variegato, si comprende bene l'importanza assegnata dal Valier alle 'ricognizioni su campo' portate avanti dai visitatori della Compagnia della Carità, in quanto proprio sulla base degli elementi

(edd.), *Dal Feudalesimo al Capitalismo*, Torino, Einaudi, 1978, pp. 981-1047, in particolare cfr. le pp. 986-987 e 1038-1043; G. Ricci, «Nel paese di Anomalia» (*Vergognosi/declassati*), in V. Zamagni (ed.), *Povertà e innovazioni istituzionali in Italia. Dal Medioevo ad oggi*, Bologna, il Mulino, 2000, pp. 175-182.

⁴⁸ *Institutione dell'opera della carità di Verona*, cit., cc. 4r-4v.

⁴⁹ La studiosa basa la sua indagine sull'estimo del 1558, una scelta motivata dall'esigenza di indagare il fenomeno della povertà a Verona in un periodo di vita cittadina non alterato da crisi e, pertanto, capace di restituire un'immagine «il più possibile normale – se così si può dire – della povertà veronese». Cfr. P. Lanaro Sartori, *Radiografia della soglia di povertà in una città della terraferma veneta: Verona alla metà del XVI secolo*, «Studi Veneziani», n. 6, 1982, pp. 45-85, p. 49 per la citazione, Pullan, *Poveri, mendicanti e vagabondi*, cit., pp. 988 ss. Per un'analisi completa e sistematica della serie dei campioni d'estimo veronesi stilati tra il 1409 e il 1625: A. Tagliaferri, *L'economia veronese secondo gli estimi dal 1409 al 1635*, Milano, Giuffrè, 1966.

emersi attraverso di esse, i «padri curati» della contrada, insieme ai visitatori, avevano il compito di stilare una breve relazione che andava presentata alle assemblee generali mensili della Compagnia, nel cui ambito veniva definito il piano di intervento specifico da mettere in atto⁵⁰. Il regolamento valeriano aveva potenziato questo momento assembleare, stabilendo una riunione generale a cadenza fissa, ogni seconda domenica del mese, aperta oltre che ai membri del sodalizio, anche ai «provveditori della città», ai «signori delle altre opere pie della Città», al «Capitolo delli reverendi canonici» e ad «ogni monasterio di religiosi»⁵¹, al fine di creare un'efficace sinergia tra i diversi soggetti impegnati nel terreno della carità e dell'ordine sociale, nel tentativo di rispondere nel modo migliore ai bisogni dei malati e dei poveri della città, con un'assegnazione razionale delle risorse disponibili, evitando inutili sovrapposizioni di competenze e favorendo un'adeguata distribuzione delle persone all'interno delle diverse strutture assistenziali cittadine, che proprio durante l'episcopato del Valier conobbero un processo di riordino e di specializzazione.

A questo riguardo, è utile ricordare che Verona era caratterizzata da un ricco ventaglio di opere pie, nel regolamento valeriano della Compagnia della Carità si fa menzione di alcune delle più importanti, ovvero quelle «del Monte, della Pietà, di san Giacomo, della Misericordia»⁵². Si tratta, ovviamente, del Monte di Pietà, di cui si dice nella *Relazione ad limina* del 1607 «porge grande aiuto non solo a' poveri, ma eziandio ad altri cittadini, i quali possono causare l'usure ebraiche, e ricevere danaro, lasciandovi a malleveria alcuna delle loro suppellettili», e dei tre ospedali più importanti della città, dei quali nella stessa *Relazione* si riferisce: «l'uno è posto a *S. Maria della Misericordia*, nel quale è provveduto a' fanciulli rimasti senza genitori, ed agli uomini afflitti da irreparabile malattia. Il secondo, che ha nome *La pietà*, è aperto a' bambini, che non si sa cui sen vengono, ed in lui pur sono accolti i febricitanti ed i feriti. I leprosi entrano nel terzo, che è detto di *S. Jacopo*»⁵³.

⁵⁰ *Institutione dell'opera della carità di Verona*, c. 5v.

⁵¹ *Ibid.*, c. 3r.

⁵² *Ibid.*

⁵³ *Dello stato della chiesa veronese*, pp. 16-17. Interessanti notizie sulle quattro istituzioni si desumono anche dall'anonima *Informazione delle cose di Verona e del Veronese compiuta il primo giorno dei marzo MDC*, la quale nel solenne ingresso dell'«Illustrissimo e Reverendissimo Monsignore Luigi marchese di Canossa al vescovato di Verona. Si pubblica dal sacerdote Cesare Cavattoni bibliotecario comunale, Verona, dalla Tipografia di Giuseppe Civelli, 1862, pp. 20-21. Per un profilo storico dei tre ospedali, con specifica attenzione per il periodo della prima età moderna, si rinvia ai contributi di Gian Maria Varanini (*La carità del municipio. Gli ospedali veronesi nel Quattrocento e nel primo Cinquecento*, pp. 13-41), e di Paola Lanaro (*Carità e assistenza, paura e segregazione. Le istituzioni ospedaliere veronesi nel Cinque e Seicento verso la specializzazione*, pp. 43-55), in A. Pastore, G.M. Varanini, P. Marini, G. Marini (edd.), *L'Ospedale e la città. Cinquecento anni d'arte a Verona*, Verona, Cierre Edizioni, 1996, pp. 13-41. Un quadro di sintesi sulla politica sociale portata avanti a Verona durante l'episcopato del Giberti è offerto da O. Viviani, *La riforma sociale cattolica del vescovo G. Matteo Giberti*, in *Zenonis cathedra. Miscellanea di studi in onore di S.E. l'arcivescovo Mons. Giovanni Urbani*, a cura di Nova

Va precisato che il Monte di Pietà di Verona era nato nel 1490 su impulso del francescano dell'Osservanza Michele da Acqui, per servire «gratis et senza premio alcuno per amor di Dio à poveri bisognosi», fornendo loro un aiuto in denaro dietro pegno di qualche suppellettile⁵⁴. Nel corso degli anni il Monte conobbe una crescita importante, supportata soprattutto dalla Società della Pietà, confraternita preposta alla sua gestione e voluta anch'essa da fra Michele, la quale arrivò a comprendere, a distanza di appena un anno dalla sua fondazione, ben 70.000 persone tra città e territorio⁵⁵. Nel corso del Cinquecento il Monte diversificò le sue attività, assumendo sempre di più le caratteristiche di un istituto bancario. Nel 1544 le magistrature cittadine dotavano l'istituzione di un nuovo fondo, detto Monte grande, deputato ai prestiti di qualsiasi entità e separato dal fondo destinato ai piccoli prestiti, detto Monte piccolo. Presto si aggiunse anche un terzo Monte, detto Monte mezzano, nato per affiancare il Monte grande nella gestione amministrativa. Il Valier intervenne per riordinare il complesso sistema di depositi ad interesse che si era venuto a creare a Verona, emanando un decreto nel 1581, nel quale si stabiliva che la città poteva vendere una parte dei propri beni e, poi, prenderli in affitto, corrispondendo agli acquirenti un interesse pari al 5%. In questo modo il guadagno sarebbe derivato non più dal denaro, ma dalla terra⁵⁶.

Historia, Verona, Tipografia Aurora, 1955, pp. 85-110.

⁵⁴ Come si intuisce dall'appellativo che accompagna il nome, fra Michele nacque ad Acqui, in provincia di Alessandria, intorno alla metà del XV secolo. Entrò nell'Ordine francescano nel 1460, negli anni 1482-1483 ricoprì l'incarico di Commissario provinciale dell'Osservanza in Sardegna e nel 1587 fu nominato Predicatore Apostolico. Si distinse soprattutto per l'attività di predicazione, che svolse negli ultimi due decenni del XV secolo. Lo troviamo come predicatore a Brescia, Cremona, Genova, Verona e Perugia. Le ultime notizie sulla sua vita risalgono al 1499 e si fa risalire la sua morte al 1500 circa. Sappiamo con certezza che fu a Verona nel 1490, nel 1491 e, poi, nel 1496. La fondazione del Monte di Pietà di Verona risale all'agosto del 1490 e fu sollecitata da una supplica scritta – purtroppo perduta – rivolta da Michele d'Acqui alle magistrature veronesi, accompagnata da alcuni capitoli per il governo del Monte e fatta seguire, subito dopo, da una grande processione cittadina organizzata per raccogliere i fondi necessari all'istituzione del Monte. Cfr. A. Ghinato, *Il Beato Michele D'Acqui († 1500) e il suo apostolato in Verona*, in Id., *Studi e documenti intorno ai primitivi Monti di Pietà*, 4 voll., Roma, Edizioni Francescane, 1963, Vol. IV: *Miscellanea*, pp. 61-117. Per la citazione si rimanda ai *Capitoli et ordini del Santo Monte di Pietà di Verona*, in Verona, appresso Girolamo Discepolo, 1595, c. 9r.

⁵⁵ Al fine di assicurare l'esistenza del Monte, Michele d'Acqui promosse anche l'istituzione di una confraternita, presso la chiesa di San Bernardino, che era sede degli Osservati sin dal 1452. Alla confraternita, detta Scuola della Pietà, furono riconosciuti diversi privilegi per tramite della bolla *Intenta salutis* del 24 aprile 1491, che arrivava ad appena un anno di distanza dalla sua fondazione, favorendo in modo decisivo il futuro sviluppo del sodalizio. Cfr. Ghinato, *Il Beato Michele D'Acqui*, cit., pp. 104-107.

⁵⁶ A questo riguardo si vedano i *Capitoli et ordini del Santo Monte di Pietà di Verona*, di cui è stata consultata l'edizione del 1595; e, in particolare, il decreto del Valier datato 13 febbraio 1581, che occupa le prime carte del documento (cc. 2r-5v). Interessanti informazioni sulla storia del Monte di Pietà si trovano nell'*Abbrobatio capitulorum* concessa dalle magistrature comunali veronesi il 24 giugno 1574 (*ibid.*, cc. 9v-10v). Del Monte di Pietà di Verona parlano anche Pighi, *Cenni storici sulla Chiesa veronese*, cit., Vol. II, pp. 264-265; Black, *Le confraternite italiane*

La complessa soluzione escogitata dal Valier per aggirare il delicato problema del prestito ad interesse, aggiunge un altro piccolo tassello all'ampio ed articolato quadro della politica assistenziale-educativa che egli portò avanti nella sua diocesi e che nel corso degli anni si declinò in tante e diversificate iniziative, le quali, o che fossero promosse per integrare e potenziare l'esistente o che fossero dirette a colmare delle lacune, muovevano comunque tutte dalla volontà di intercettare i reali bisogni del popolo dei fedeli. In questa direzione, non si può mancare di ricordare che il Valier garantì il proprio supporto anche al Monte frumentario, detto *Fonteghetto*, che si può considerare un'appendice del Monte di Pietà, visto che da qui proveniva il denaro con il quale veniva acquistato il grano in esso conservato e visto che era animato dalla medesima finalità di sostegno ai poveri, che in questo caso era garantito dalla possibilità di acquistare grano ad un prezzo calmierato, anche in tempo di carestia o di altre calamità che di frequente affliggevano la società di età moderna, determinando un significativo rialzo del costo del grano⁵⁷.

Ma ritornando alle opere pie menzionate nel documento valeriano sull'*Institutione dell'opera della carità di Verona*, è utile sottolineare che la *Domus Pietatis*, istituita nel 1425-26, aveva perso il ruolo dominante detenuto nel corso del Quattrocento all'interno del panorama ospedaliero veronese all'indomani dell'istituzione dell'ospedale della Misericordia, e si era concentrata progressivamente soprattutto sulla cura degli esposti, pur continuando ad accogliere i feriti e gli ammalati «non incurabili né contagiosi, ma soltanto di febbre»⁵⁸. Dell'ospedale di San Giacomo e Lazzaro alla Tomba, la cui

del Cinquecento, cit., p. 294; B. Pullan, *La politica sociale della Repubblica di Venezia 1500-1620*, 2 voll., Roma, Il veltro, 1982, Vol. II: *Gli Ebrei veneziani e i Monti di pietà*, pp. 654-656; e, soprattutto, P. Lanaro Sartori, *L'attività di prestito dei Monti di pietà in terraferma veneta. Legalità e illeciti tra Quattrocento e primo Seicento*, «Studi storici Luigi Simeoni», vol. 33, 1983, pp. 161-177. Va ricordato che il decreto del Valier fu pubblicato anche in Pietro Ballerini, *De jure divino et naturali circa usuram libri sex* [...], 2 voll., Bononiae, apud Thomam Colli ex Typographia S. Thomae Aquinatis, 1747, Vol. II: *Vindiciae juris divini, ac naturalis circa usuram* [...], pp. 245-250.

⁵⁷ Il sostegno del Valier al *Fonteghetto* – a memoria del quale rimane oggi il nome di un vicolo presso via S. Vitale – è confermato, ancora una volta, dalla *Relazione ad limina* del 1607, nella quale si legge: «E ne' tempi di penuria è gran tesoro a' poveri un certo granaio, che qui diciamo il fonteghetto. In lui si pongono le farine, che il vescovo ed altre persone misericordiose procacciano comperando frumento al tempo della mese. Queste farine si danno a bassissimo prezzo soltanto a' poveri, che mancano del cibo necessario». Cfr. Valier, *Dello stato della chiesa veronese*, cit., p. 17 (per la citazione); Pighi, *Cenni storici sulla Chiesa veronese*, cit., Vol. II, p. 265 e Fasani, *Riforma pretridentina della diocesi di Verona*, cit., p. CXXXV.

⁵⁸ Circa la cura dei fanciulli esposti accolti nell'ospedale della Pietà, nell'anonima *Informazione delle cose di Verona e del veronese* del 1600 (Verona, dalla Tipografia di Giuseppe Civelli, 1862, p. 20) si riferisce: «per ordinario si ritrovano in detta Casa pupilli cento, balie otto con figliuoli esposti, feriti et amalati di febre al N. di XX. E fuori 400 altri figliuoli esposti dati a balie a lire cinque per una al mese». Per un profilo storico dell'ospedale della Pietà si vedano: Biancolini, *Notizie storiche delle Chiese di Verona*, cit., Vol. III, pp. 242-255; A.G. Cristofani, *Cenni storici sugli spedali e istituti di pubblica beneficenza in Verona*, Verona, Bisesti, 1839, pp. 25-28; Fanelli,

fondazione risaliva addirittura al 1225, si può ricordare, invece, che rimase per tutto il Cinquecento una delle principali istituzioni assistenziali cittadine e che, con il diminuire dei casi di lebbra, andò specializzandosi nella cura della peste e delle malattie contagiose⁵⁹. L'ospedale di Santa Maria della Misericordia, infine, nato nel 1515 per accogliere le persone affette da sifilide, nel corso degli anni aveva esteso progressivamente le sue funzioni, assumendo anche la cura dei fanciulli orfani e, più tardi, quella dei tisici⁶⁰; inoltre, non va dimenticato che dalla casa della Misericordia dipendeva anche il monastero della Santissima Trinità, che per volere dello stesso Giberti nel 1536 era stato destinato alle 'convertite', dette *Maddalene* dal nome della protettrice dell'istituto, vale a dire quelle «femmine, le quali, – si spiega nella *Relazione ad limina* del 1607 –, noiate delle mondiali vanità, a Dio in perpetuo si dedicarono, prendendo una vita quasi da monache»; a queste si erano aggiunte anche le 'pupille', ovvero le fanciulle orfane precedentemente accolte nella Casa della Misericordia, e successivamente anche alcune gentildonne da marito ospitate a pagamento, alle quali – come per le altre due tipologie di condizione femminile – era riservato un luogo distinto e separato all'interno della casa⁶¹.

Il Monte e le istituzioni ospedaliere appena ricordate sono solo alcuni degli esempi più noti del ricco e vasto panorama di opere pie che animano la Verona del Valier; le loro storie e soprattutto i significativi cambiamenti che le interessarono nel corso del XVI secolo, consentono di comprendere, da un lato, il processo di specializzazione e di ampliamento che conobbe il sistema caritativo-

Storia degli ospedali di Verona, cit., pp. 175-176 (per la citazione p. 176); M. Garbellotti, *La Domus Pietatis*, in Marini, Marini (edd.), *L'Ospedale e la città*, cit., pp. 69-79.

⁵⁹ Cfr. Biancolini, *Notizie storiche delle Chiese di Verona*, cit., Vol. II, pp. 587-590; Cristofani, *Cenni storici sugli spedali*, cit., pp. 1-5; Fanelli, *Storia degli ospedali di Verona*, cit., pp. 168-175; S. Faccini, *L'ospedale dei Santi Giacomo e Lazzaro alla Tomba in età moderna*, in Marini, Marini (edd.), *L'Ospedale e la città*, cit., pp. 63-67.

⁶⁰ Nell'*Informazione delle cose di Verona e del veronese* del 1600 (cit., p. 21) circa l'ospedale della Misericordia si riferisce: «si accettano [...] poveri incurabili, i quali per ordinario sono al numero di sessanta; e li pupilli, i quali sono al presente al numero di XXII, e vestono di turchino». Per un inquadramento storico dell'istituzione si rimanda a: Biancolini, *Notizie storiche delle Chiese di Verona*, cit., Vol. IV, pp. 387-390; Cristofani, *Cenni storici sugli spedali*, cit., pp. 39-66; Fanelli, *Storia degli ospedali di Verona*, cit., pp. 157-168; B. Cantù, *La Santa Casa di Misericordia*, in Marini, Marini (edd.), *L'Ospedale e la città*, cit., pp. 81-87.

⁶¹ Dall'*Informazione* anonima del 1600 (cit., p. 21) si apprende che nella Casa della Santissima Trinità, poi detta di Santa Maria Maddalena, erano accolte venti convertite, cinquanta giovani nobili e trenta pupille. Sulla storia del conservatorio in generale si vedano: *Dello stato della chiesa veronese*, cit. pp. 17-18 (per la citazione); Biancolini, *Notizie storiche delle Chiese di Verona*, cit., Vol. II, pp. 738-747; Cristofani, *Cenni storici sugli spedali*, cit., pp. 68-71; Fanelli, *Storia degli ospedali di Verona*, cit., pp. 165-166, pp. 179-180. Informazioni circa il governo dell'istituto e i programmi educativi riservati a convertite, pupille e convittrici a pagamento si ricavano dalle *Nuove provisioni per il governo del luogo della Santa Trinità di Verona*, In Verona, per Sebastiano dalle Donne, et Giovanni fratelli, 1579. All'esemplare del regolamento consultato presso la Biblioteca civica di Verona (collocazione c.v. 414) è legato un foglio manoscritto con sigillo, datato 18 aprile 1580, che attesta l'approvazione delle nuove regole da parte del vescovo Valier.

assistenziale veronese in questo periodo e, dall'altro, il ruolo nevralgico svolto dalla Compagnia della Carità in questo ambito. Ad essa, infatti, non solo fu affidato il lavoro di 'mappatura-classificazione' delle situazioni di povertà, malattia e bisogno presenti nella città, ma fu assegnato anche il compito di rappresentare un nuovo modello associativo laicale, incentrato sulla perfetta combinazione tra ideale di carità ed azione caritativa concreta, capace di offrire alle altre realtà confraternali del contesto veronese un preciso esempio da seguire ed emulare⁶².

3. «Da questa pia madre son nate tre figliuole»⁶³

Il valore paradigmatico della Compagnia della Carità è messo in evidenza proprio nel regolamento valeriano della confraternita, nel quale si ricorda come sulla scorta dell'esempio e delle attività svolte da questo sodalizio, nel giro di pochi decenni erano fiorite a Verona altre tre opere pie, vale a dire l'Opera di san Francesco, quella de' Derelitti, e delle Derelitte e quella dei prigionieri. Si tratta di tre realtà, operanti sempre nel campo assistenziale ed educativo, che ricoprirono certamente una funzione di primaria importanza ai fini del mantenimento dell'*ordo* sociale e che – nel caso specifico delle prime due – conobbero un intervento diretto ed incisivo da parte del Valier, che ne seppe valorizzare le specifiche peculiarità, mettendole al servizio della causa della riforma del popolo.

Sull'Opera dei Prigionieri non abbiamo molte informazioni e, se il regolamento valeriano della Compagnia della Carità la presenta come una confraternita di recente istituzione⁶⁴, Francesco Bagatta ne fa risalire la fondazione addirittura al 1214. In ogni caso la Pia Opera dei Prigionieri andava a coprire un ambito di intervento molto importante, come quello dell'assistenza materiale e spirituale dei carcerati, che non rientrava nella sfera d'azione dell'antica e prestigiosa Confraternita di Santa Maria della Neve, detta della Giustizia, preposta al conforto e alla cura dei condannati a morte⁶⁵. Essa, infatti, ricorda sempre il

⁶² Questa funzione di raccordo tra le varie istituzioni assistenziali veronesi attribuita alla Compagnia della Carità era stata prefigurata già dal Giberti, come si può evincere dalla lettura del capitolo delle *Costituzioni per il clero* ad essa dedicato: «conveniens quin potius necessarium fuit ut, ad Dei honorem et gloriam pauperumque ac miserabilium personarum (quae Christi membra esse censentur) subventionem ac totius gregis, curae nostrae commissi, compagem charitatis nexibus Dominique firmissimis glutinis connectendam et mutuae pietatis officiis manutenedam et adiuvandam, institueretur in civitate Veronensi sancta ac laudabilis *Societas Charitatis*». Cfr. Giberti, *Constitutiones*, cit., tit. V, cap. 8, p. 314.

⁶³ *Institutione dell'opera della carità*, cit., c. 5r.

⁶⁴ *Ibid.*

⁶⁵ Le prime notizie sulla Confraternita dei disciplinari di Santa Maria della Neve, detta della Giustizia, dapprima denominata di San Vitale (dal nome della contrada sede della confraternita),

Bagatta, non solo «sovveniva [...] di alimento e di vestito quelli fra loro che erano miserabili, e questo faceva colle proprie rendite, colle elemosine dei cittadini e con elargizioni in appresso del principato, ai quali ricorreva nel bisogno», ma si preoccupava anche di «eleggere idonee e zelanti persone le quali col titolo di settimanieri provvedevano ai carcerati presso i tribunali, sia per sollecitare i loro processi, per impetrare i condoni ed anche per i rapporti d'interesse e di sangue che gli stringevano alle loro famiglie»; e, non da ultimo, provvedeva allo stesso «andamento economico, igienico e sanitario delle prigioni»⁶⁶.

Più precise sono le notizie a noi pervenute sul conservatorio femminile di san Francesco e sull'Opera dei Derelitti e delle Derelitte; l'una nata al tempo di Luigi Lippomano, vescovo di Verona dal 1548 al 1559, e l'altra su impulso dello stesso Valier, ma entrambe dotate di statuti riconosciuti e approvati dall'ecclesiastico veneziano, che meritano di essere analizzati con maggior attenzione in quanto possono essere certamente annoverati tra i documenti che meglio esemplificano il disegno di riorganizzazione delle opere pie veronesi portato avanti dal Valier.

L'opera delle zitelle o novizie di S. Francesco al Corso, meglio note come *Franceschine*, era stata istituita nel 1548 nella zona della Cittadella, per sopprimere al costante aumento del numero delle ricoverate nella casa della Trinità. Come quest'ultima, pertanto, essa si rivolgeva a donne che per diversi motivi non avevano un nucleo familiare di riferimento, vale a dire: fanciulle 'pericolanti' dai quindici anni in giù, «che per esser senza ovvero con cattivo governo [...] erano] in pericolo di perdere la honestà loro»; prostitute 'convertite', che

risalgono al quarto decennio del XIV secolo. Sviluppato presto un impegno nell'aiuto e nel conforto dei condannati a morte, la confraternita conobbe un notevole impulso nel 1578, quando le fu concessa l'unione alla prestigiosa confraternita di San Giovanni Decollato di Roma e «la partecipazione di tutte le grazie, di tutti i privilegi, e di tutte le indugentie» concesse a questa venerabile compagnia. Cfr. Biancolini, *Notizie storiche delle Chiese di Verona*, cit., Vol. III, pp. 202-212; G. De Sandre Gasparini, *Confraternite e cura animarum nei primi decenni del Quattrocento. I disciplinati e la parrocchia di San Vitale in Verona*, in P. Sambin (ed.), *Pievi, parrocchie e clero nel Veneto dal X al XV secolo*, Venezia, Deputazione di storia patria per le Venezie, 1987, pp. 289-360. Per la citazione si rimanda ai *Capitoli, et ordini della Venerabile Compagnia della Madonna della Neve detta della Giustizia di Verona* [...], Verona, Appresso Sebastiano dalle Donne, et Giovanni fratelli, 1580 (p. 14), di cui si segnala anche la presenza di un esemplare postillato dal sottopriore Lodovico Pinelli, che è attualmente conservato presso la Biblioteca Civica di Verona (collocazione: c.v.405). Per la confraternita di San Giovanni Decollato di Roma si veda: V. Paglia, *La morte confortata. Riti della paura e mentalità religiosa a Roma nell'età moderna*, Roma, Edizioni di storia e letteratura, 1982.

⁶⁶ Francesco Bagatta, *Storia degli spedali e degli istituti di beneficenza in Verona dall'epoca cristiana a giorni nostri raccolta e ordinata da F. Bagatta*, Verona, dallo Stabilimento di Giuseppe Civelli, 1862, p. 30. Sulla Pia Opera dei Prigionieri e, più in generale sul sistema di carceri e pene veronesi dall'età romana fino all'unità d'Italia si veda R. Laschi, *Pene e carceri nella storia di Verona. Memoria presentata all'Istituto Veneto di Scienze, Lettere ed arti nella seduta del 10 luglio 1904 dal M.E. Comm. Fedele Lampertico, Sen. del Regno*, Venezia, Officine grafiche di C. Ferrari, 1904, in particolare pp. 64-65. Interessanti riflessioni sull'intervento caritativo-assistenziale all'interno delle realtà carcerarie di età moderna, anche se incentrate in modo più specifico sul contesto romano, si trovano in V. Paglia, *La pietà dei carcerati. Confraternite e società a Roma nei secoli XVI-XVIII*, Roma, Edizioni di storia e letteratura, 1980.

volevano cambiare vita; e donne malmaritate, «che per qualche urgentissima causa, non [...] potevano] star con i loro mariti»⁶⁷. «Ampliato, et accommodato [...] nel tempo di Monsignor Agostin Lippomano»⁶⁸, nel corso di poco più di un cinquantennio, in linea con il significativo sviluppo che i conservatori femminili registrarono in Italia e in diverse aree d'Europa proprio nella seconda metà del XVI secolo⁶⁹, il conservatorio di san Francesco si era consolidato, tanto che – secondo quanto riferito nell'anonima *Informazione delle cose di Verona* del 1600 – poteva contare sulla presenza di ben novantacinque ricoverate⁷⁰. Il Valier aveva sostenuto costantemente il processo di affermazione dell'istituto, assicurando ad esso una «particolar, et assidua cura, et protezione» e incoraggiando la pubblicazione dei nuovi *Ordini, e capitoli sopra il governo delle novizze di san Francesco di Verona*, che furono dati alle stampe per sua istanza nel 1599⁷¹.

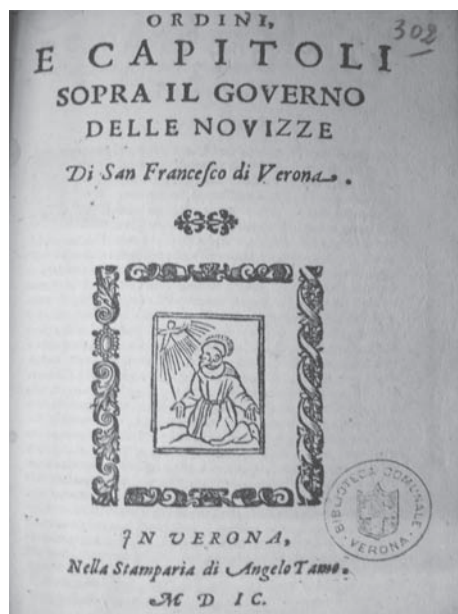


Fig. 4. Frontespizio del testo *Ordini, e capitoli sopra il governo delle novizze di san Francesco di Verona*, In Verona, Nella stamparia di Angelo Tamo, 1599 (Biblioteca civica di Verona, collocazione: c.v.50; foto a cura dell'A.).

⁶⁷ *Ordini, e capitoli sopra il governo delle novizze di san Francesco di Verona*, In Verona, Nella stamparia di Angelo Tamo, 1599, p. 12.

⁶⁸ *Ibid.*, p. 3.

⁶⁹ Dei numerosi studi dedicati alla storia dei conservatori femminili e, più in generale, alle istituzioni educative femminili di antico regime si rimanda a: T. Ledóchowska, *Conservatorio*, in *Dizionario degli istituti di perfezione*, 10 voll., diretto da G. Pelliccia, [poi] da G. Rocca, Milano, Paoline, 1974-2003, Vol. II, pp. 1627-1630; *Conservatori di Roma*, in G. Moroni, *Dizionario di erudizione storico-ecclesiastica*, 103 voll., In Venetia, Dalla Tip. Emiliana, 1840-1861 (con *Indice* in 3 voll., 1878-1879), Vol. XVII, pp. 9-42; A. Groppi, *I conservatori della virtù: donne recluse nella Roma dei papi*, Roma-Bari, Laterza, 1994; G. Boccadamo, *Monache di casa e monache di conservatorio*, in G. Galasso, A. Valerio (edd.), *Donne e religione a Napoli. Secoli XVI-XVII*, Milano, Franco Angeli, 2001, pp. 159-191; N. Terpstra, *Culture di carità e culture di governo cittadino a Bologna e Firenze nel Rinascimento*, in Gazzini (ed.), *Studi confraternali*, cit., pp. 271-289, in particolare pp. 281-289.

⁷⁰ Cfr. *Informazione delle cose di Verona*, cit., p. 21. Ulteriori informazioni sul conservatorio delle Franceschine si ricavano da: *Dello stato della chiesa veronese nel MDCVII*, cit., p. 18; Biancolini, *Notizie storiche delle Chiese di Verona*, cit., Vol. III, pp. 110-111; Cristofani, *Cenni storici sugli ospedali*, cit., pp. 72-79; Pighi, *Cenni storici sulla Chiesa veronese*, cit., p. 264; Fanelli, *Storia degli ospedali di Verona*, cit., 1962, pp. 178-179.

⁷¹ *Ordini, e capitoli sopra il governo delle novizze di san Francesco di Verona*, cit., p. 4. Tale

Nel pieno rispetto dell'impostazione originaria, gli *Ordini* confermavano il ruolo fondamentale della congregazione dei 'protettori' delle Franceschine, costituita da uomini laici presi «così de' Nobili, come de' Mercanti, et Artisti», che erano responsabili del «governo esterno» e della «provisione del vivere» del conservatorio, garantendo ad esso tutto il necessario per il suo funzionamento materiale. A questo proposito, risultano particolarmente eloquenti le affermazioni riportate nel capitoletto di chiusura del regolamento, laddove si legge:

Essendo stata questa santissima opera, dal principio, che ella fu istituita, fino a questi tempi presenti, sempre retta e governata da huomini laici i quali, non solo con molte fatiche e travagli, ma con le proprie sostanze ancora l'hanno per il più sostenuta, et aumentata, poichè, oltre le molte elemosine, che di continuo, e del publico, e del privato, gli hanno larghissimamente somministrate, hanno speso grandissima quantità di denari, così nella compra e primo acquisto del luogo di S. Francesco, come anco nel fabricarlo, e ridurlo nel stato, in che hora si ritrova⁷².

I protettori, infatti, si occupavano delle procedure di accettazione delle novizie, procuravano loro il lavoro per impegnare attivamente le giornate, si preoccupavano del loro sostentamento, della cura delle ammalate, e dell'eventuale reintegrazione delle Franceschine nel tessuto sociale, avendo cura di «restituir le maritate a i loro mariti, riconciliandole con quelli», provvedevano altresì a «trovar partiti» per le più meritevoli, senza dimenticare, infine, di «collocare tutte quelle che [... avevano] animo di andar a servire, in casa di persone honeste»⁷³.

Anche per quel che concerne il «governo interiore» del conservatorio si manteneva l'impostazione tradizionale dell'istituto, confermando il ruolo centrale della priora, «donna di matura età, di buona fama, et approvata vita e costumi», da cui dipendeva il buon funzionamento della casa e la retta condotta delle Franceschine. In linea con l'impostazione tipica dei conservatori femminili dell'epoca, la casa di San Francesco al Corso rispondeva a un modello organizzativo di tipo familiare, che andava ad assicurare alle ricoverate una rete di protezione, vigilanza e sostegno che riproduceva nelle sue strutture di governo esterne ed interne quel tessuto di relazioni familiari che alle donne in esso accolte era venuto a mancare. Infatti, se i protettori gestivano i rapporti con il mondo esterno, andando a riprodurre in qualche modo le funzioni tipiche

supporto trova conferma nelle disposizioni stabilite dal Valier per incoraggiare nelle chiese della diocesi la raccolta di elemosine a favore delle «Novizze et convertite di San Francesco in Cittadella», che emergono dalla lettura di un documento vescovile, purtroppo non datato, conservato presso la Biblioteca Civica di Verona (Stampe 14.l.2, FV54). Per una descrizione del documento si veda L. Carpanè, M. Menato (edd.), *Annali della Tipografia veronese del Cinquecento*, 2 voll., Baden-Baden, V. Koerner, 1992-1994, Vol. II, p. 631.

⁷² *Ordini, e capitoli sopra il governo delle novizze di san Francesco di Verona*, cit., p. 30.

⁷³ *Ibid.*, p. 11.

del ruolo genitoriale paterno, la priora assolveva a tutti quei compiti di cura, vigilanza e correzione tipicamente materni, tanto che nel regolamento valeriano veniva invitata ad avere cura delle sue novizie «amandole, correggendole come figliuole» e, a loro volta, le novizie erano incoraggiate ad obbedirle proprio «come figliuole a madre»⁷⁴.

Le regole di condotta prescritte per la vita interna del conservatorio si rifanno al paradigma monastico dell'*ora et labora*. Sottolineata la necessaria separazione delle «pupille dalle convertite, così nel lavorare, come nel mangiare, e dormire»⁷⁵, garantita da ambienti distinti e appositamente predisposti per le diverse condizioni femminili accolte nella Casa di S. Francesco in Cittadella, la maggior parte delle indicazioni fornite negli *Ordini* valeriani riguardano gli adempimenti religiosi: digiuno «tutte le vigilie comandate, la Quadragesima, e tutti i Venerdì dell'Anno», orazioni «a certe hore del giorno, e massime le feste», messa «almeno tutte le Domeniche» e confessione «almeno una volta il mese»⁷⁶. Generiche indicazioni sono fornite sulle attività lavorative, indicate comunque come parte integrante del programma educativo delle novizie, per lo meno, di quei soggetti che risultavano idonei a qualche mansione. «Quelle Novizze – si legge negli *Ordini* – che non saranno impedita ne i servitij della Casa, si occuperanno in lavorar, alle hore e tempi debiti, a discrezione della Priora, la quale applicherà ciascheduna a quello esercitio, al quale la conoscerà più atta, e più inclinata, e procureranno i Protettori, che non manchi loro da lavorar, accioche non stiano indarno»⁷⁷.

Il *proprium* del regolamento valeriano, tuttavia, va individuato nell'accentuazione della tutela vescovile sul conservatorio, che ritroviamo in alcune disposizioni specifiche in cui si fa esplicitamente riferimento a «Monsignor Reverendissimo»; che viene chiamato in causa, ad esempio, nell'approvazione del confessore delle Franceschine e del cappellano deputato alla celebrazione della messa domenicale nella chiesa di S. Francesco⁷⁸; che è ricordato come presenza costante nelle riunioni settimanali della congregazione dei protettori⁷⁹; e di cui si fa presente la funzione di supervisione sull'andamento generale dell'istituto esercitata in particolare nel momento della visita pastorale annuale, effettuata personalmente o per tramite del vicario, e riservata all'esame puntuale di «tutte quelle donne a una per una, per intender tutti i successi del logo, e massime i portamenti, e costumi di ciascheduna»⁸⁰.

Uno schema simile di sostegno e supporto era stato messo a punto dal Valier per l'Opera dei Derelitti e delle Derelitte, con una peculiarità in più do-

⁷⁴ *Ibid.*, p. 21.

⁷⁵ *Ibid.*

⁷⁶ *Ibid.*, pp. 21-22.

⁷⁷ *Ibid.*, p. 23.

⁷⁸ *Ibid.*, p. 22.

⁷⁹ *Ibid.*, p. 11.

⁸⁰ *Ibid.*, p. 25.



Fig. 5. Frontespizio del testo *Ordini e capitoli del governo delli Derelitti, istituito nella Magnifica Città di Verona l'anno 1572*, In Verona, appresso Sebastiano et Giovanni dalle Donne, 1573 (Biblioteca civica di Verona, collocazione: c.v.157; foto a cura dell'A.).

fanciulli con un'età compresa tra i sei e i sedici anni, esclusi i «pupilli orfani», di pertinenza dell'Ospedale della Misericordia, così come «li debili, et infermi, et quelli che ad ogni modo havendo, o potendo haver qualche honesto governo, possono vivere di sue fatiche, senza mendicare»⁸⁴.

Lo scopo eminentemente educativo con il quale nasceva la Casa dei Derelitti emerge chiaramente dalla lettura del regolamento predisposto per la sua gestione. Nel capitoletto intitolato *Dell'istruir li Derelitti*, infatti, si fa presente che:

sarà carico del governatore di attender in generale, che li putti siano devoti et osservino li divini precetti, e di S. Chiesa, assuefacendoli secondo l'età loro, a digiunare le vigilie comandate, et la Quaresima, et alla S. Oratione a cert'hore ogni giorno, e che ogni festa,

vuta al fatto che il ruolo del vescovo di Verona, come già accennato, era stato determinante proprio per la sua stessa istituzione⁸¹. Dagli *Ordini e capitoli del governo delli Derelitti* si apprende che tutto aveva avuto origine nel maggio del 1572 allorquando, per impulso del vescovo di Verona, venivano «raccolti dalle piazze, et hospitali, et da tutta la Città in un casa, pigliata a questo effetto [...], oltra cinquanta putti», che venivano affidati alle cure di alcune persone pie per essere istruiti nella «vita christiana» ed avviati a un mestiere⁸².

La Casa dei Derelitti si rivolgeva, pertanto, a quei «putti [d'ambo i sessi] vagabondi, et mendichi» della città di Verona, che se abbandonati – si avverte sempre negli *Ordini e capitoli* – «si danno poi a vita disonesta, a biastemme, ladronezzi, et ogni altra sceleraggione; et finalmente finiscono la [...] vita di morte violenta, ò per via di Giustitia, ovvero in estrema miseria negli hospedali»⁸³. L'istituzione accoglieva

⁸¹ Cfr. Biancolini, *Notizie storiche delle Chiese di Verona*, cit., Vol. IV, p. 418; Fanelli, *Storia degli ospedali di Verona*, cit., pp. 180-182.

⁸² *Ordini e capitoli del governo delli Derelitti, istituito nella Magnifica Città di Verona l'anno 1572*, In Verona, appresso Sebastiano et Giovanni dalle Donne, 1573, c. 4v. Il regolamento conobbe almeno altre due edizioni durante il governo episcopale del Valier, nel 1585 e nel 1603.

⁸³ *Ibid.*

⁸⁴ *Ibid.*, c. 9r.

salve le sue discrete ricreazioni, si esercitino d'imparare il viver christiano, et ogni prima domenica del mese siano confessati, et chi sarà in età secondo l'arbitrio del discreto confessore divotamente comunicati⁸⁵.

Il piano educativo dell'istituzione, tuttavia, non si limitava alla sola istruzione cristiana dei fanciulli, ma contemplava anche un preciso percorso di formazione professionale affidato a dei 'maestri-artigiani', che avevano il compito di avviare i fanciulli a un mestiere, al fine di assicurare loro un «seculo viatico» per la vita futura, una volta usciti dall'istituto⁸⁶. Il binomio preghiera-lavoro è una costante delle istituzioni assistenziali veronesi, e non solo veronesi, del tempo; l'idea di carità che essi incarnano si realizza attraverso percorsi educativi o rieducativi, a seconda dell'età dei ricoverati, nei quali l'adesione ai valori cristiani e l'avviamento al 'saper fare' rappresentano gli elementi fondamentali del processo di reinserimento del soggetto in società.

Tali finalità non potevano che incontrare l'interesse delle autorità cittadine che, per tramite di tre rappresentanti, i cavalieri Ottaviano Pellegrino e Michele Verità e il dottor in legge Camillo Capella, confermarono il loro appoggio all'Opera dei Derelitti, assumendone la protezione e fissando il regolamento, di concerto con il vescovo Valier, proprio in quel 1572 che aveva visto la nascita stessa dell'istituzione⁸⁷.

Il medesimo accordo tra vescovo e magistrature cittadine consentiva, l'anno successivo, la nascita della Casa delle Derelitte, sorta per accogliere – si legge nel regolamento – tutte quelle «vagabonde, senza ricapito che sono solite dormir in hospitali, piazze, portici, et altri luoghi pubblici, fino alla età di anni quaranta, che vogliono far bene, et lavorare». Da questa istituzione erano escluse «le vecchie, le stroppiate, le inferme, et difettose di infirmità, massimamente incurabili – anche dette *infranciosate*, ovvero donne affette da sifilide –, et le gravide», in quanto queste potevano essere curate in altri istituti,

⁸⁵ *Ibid.*, c. 12r.

⁸⁶ *Ibid.*, c. 12v.

⁸⁷ Un interessante spaccato di questo stretto rapporto che unisce i vari attori sociali che animano il contesto urbano è offerto ancora una volta da Alessandro Canobbio. Questi, con riferimento alle iniziative di sostegno offerte dalle autorità cittadine ai «poveri bisognosi» e ricordando in particolare le elemosine concesse dal podestà Pietro Gritti e dal capitano Michele Foscarini durante il loro mandato (1587-1589), afferma: «non contenti della liberalità usata nella restauratione dell'Anfiteatro, e di due mila ducati donati alla santissima Compagnia della Carità, et di altri quattrocento dati in elemosina à i R.P. Cappuccini, alle Rever. Madri di S. Chiara, et a quelle di S. Caterina da Siena, all'ospitale della Misericordia, alla Trinità, alle povere di S. Francesco, et a i poveri Derelitti, et anco di sei cento minali di farina dispensati in elemosina à questo Natale, [...] non contenti dico di tutto questo hanno voluto suggellare nel fine del loro non mai abbastanza lodato reggimento con una elemosina delle più necessarie»; si fa riferimento alla decisione di dotare cento donzelle con un'elemosina di mille ducati, assegnata a questo scopo alla Compagnia della Carità. Alessandro Canobbio, *Ordini con i quali si sono dispensate le elemosine fatte a i poveri di Verona da gli Illustr. Signori Rettori il Sig. Pietro Gritti Podestà, et il Sig. Michele Foscarini Capitano. Descritti da M. Alessandro Canobio, accioche possino servire in altre simili occasioni*, In Verona, appresso Girolamo Discepolo, 1589, c. 2r.

come l'Ospedale della Misericordia, o anche a domicilio attraverso la rete assistenziale gestita dalla Compagnia della Carità⁸⁸.

La natura precipuamente emendatrice e disciplinatrice delle Case dei Derelitti e delle Derelitte trova conferma nel testo del *Proclama* pronunciato in piazza delle Erbe il 27 giugno 1573 e riportato in chiusura degli *Ordini e Capitoli del governo delli Derelitti*, che dava esecuzione al regolamento precisando che nel corso dell'anno precedente era stata fatta

generale raccolta di tutti i putti, et vagabondi, et derelitti, et similmente di Donne di tutta questa Città, dandole a ponto nome di Derelitti, et Derelitte in duoi luoghi, mettendo quelli à diverse arti, con le quali possano à tempo, et luogo procurarsi il vivere di tutta la loro vita, li quali altrimenti – si continua nel *Proclama* – andando mendichi senza artificio, et creanza alcuna erano in dishonor di Nostro Signor Dio, et in danno delle anime proprie con qualche nota di tutta questa Città, per finire la sua vita nelli hospitali miseramente, ovvero forsi [sic], come sclerati per man della giustitia⁸⁹.

I due luoghi pii, però, andavano a coprire solo una piccola parte di un problema, come quello della mendicizia, che appariva ben più grave, ampio e complesso.

4. «I bisogni spirituali de' mendicanti»⁹⁰

Poco prima della fondazione delle Case dei Derelitti e delle Derelitte il noto letterato ed avvocato veronese Alessandro Canobbio forniva una puntuale e dotta disamina sulla questione della mendicizia in un appassionato discorso, dedicato al doge Alvise Mocenigo e rivolto proprio ai protettori della Compagnia della Carità, quali arbitri della pubblica elemosina e custodi della pace e dell'ordine della città.

Vorrei dunque – affermava il Canobbio nel discorso – Signori miei, che nel nome del N.S. Giesù Christo, si aiutassero i poveri mendicanti, et da questa città si levasse il traffico della furfanteria, e tutti gli altri vitij che da lei procedono [...]. I poveri a quali desidero sia provveduto, et per i quali così caldamente scrivo, sono quelli, che per questa nostra città vanno mendicando, o per dire meglio per la maggior parte furfando, per le piazze, per le

⁸⁸ *Ordini e capitoli del governo delli Derelitti*, cit., c. 17v. Gli ordini specifici messi a punto per la *Casa delle Derelitte*, occupano l'ultima parte del testo (cc. 16v-18r).

⁸⁹ *Ibid.*, cc. 18v-19r.

⁹⁰ *Ordini con i quali si è introdotta nella città di Verona la santissima Opera de' Mendicanti unita a quella dei Derelitti, descritti da M. Alessandro Canobbio*, In Verona, nella stamperia di Girolamo Discepolo, 1590, c. 130v.

strade, per li palazzi, per le case, e per le chiese, disturbando i negotij, interrompendo i ragionamenti, e ciascuno importunando in ogni sua azione, e nelle chiese [...] con la loro furfantéscha vita, le orationi interrompono, la mente sviano, et perlo più ci fanno essere ingrati, nel ringratiare Dio nel modo, che si dovrebbe⁹¹.

L'avvocato veronese, pertanto, stabiliva un legame diretto tra furfanteria e mendicità, e caldeggiava la fondazione di una nuova opera pia dedicata alla cura esclusiva dei poveri mendicanti della città, l'unica che a suo avviso mancava ancora alla città di Verona. Era il dicembre del 1571 e di lì a breve sarebbe nata l'Opera dei Derelitti e delle Derelitte, che – come auspicato dal Canobbio –, era istituita per porre rimedio alla parte più grave del fenomeno della mendicità, rappresentata da quei fanciulli poveri e abbandonati che di fatto costituivano la «semenza» di tutti i disordini e scandali futuri⁹². Si trattava, dunque, di una prima risposta al problema della mendicità, che necessitava di essere ampliata e potenziata in quanto non copriva, evidentemente, la totalità dei mendicanti.

Da questa constatazione prese le mosse l'Opera dei Mendicanti, nata inizialmente proprio come ampliamento dell'Opera dei Derelitti e delle Derelitte, per l'impulso di alcuni devoti raccolti attorno all'Oratorio dei padri della Compagnia di Gesù. Ottenuto il sostegno dei sodali della Compagnia della Carità, come auspicato dal Canobbio, quello dei protettori di altri luoghi pii – a cominciare dai protettori del Conservatorio di san Francesco e, ovviamente, delle Case dei Derelitti e delle Derelitte –, arrivarono subito dopo anche l'approvazione delle magistrature veronesi e del vescovo di Verona⁹³.

Agostino Valier, infatti, nella lettera pastorale del 16 aprile 1590 avanzava una precisa proposta per porre rimedio alle gravi problematiche connesse ai fenomeni della mendicità e del vagabondaggio, che proprio in quell'anno avevano raggiunto livelli preoccupanti, a causa della terribile carestia che aveva colpito l'area centro settentrionale della penisola italiana:

Et vedendosi appresso che in questa mendicità il Demonio si sforza di far mercantia con molte fraudi, con una intollerabile importunità, che impedisce molte volte il Santo sacrificio della Messa, et che fa alcuni mendici più artificiosi abondino, et altri verecondi patiscono estrema necessità, diventando gl'artificiosi mendici scelerati, bugiardi, pieni di vitij, et lontani da ogni Christiana disciplina, non si aiutando con i Santissimi Sacramenti, come converrebbe, lo Spirito Santo ha suggerito in Roma al Vicario di Christo, in Bologna, in Brescia, in Vicenza, come s'intende, et in altre città, che si habbia l'occhio à soccorrere anco à i bisogni spirituali de' mendici: si è giudicato qui in Verona che sia bene, stendendo l'opera

⁹¹ Alessandro Canobbio, *Discorso [...] ai magnifici presidenti della carità di Verona, nel quale si mostra l'importantia del provvedere a Poveri mendicanti*, In Padova, per Lorenzo Pasquati, 1572, cc. 11v-12v.

⁹² *Ibid.*, c. 19v.

⁹³ *Ordini con i quali si è introdotta nella città di Verona la santissima Opera de' Mendicanti*, cit., cc. 128v-131r. I capitoli del regolamento sono introdotti e commentati nelle note finali dall'avvocato Alessandro Canobbio, che fornisce numerose informazioni sull'attività del luogo pio dei Derelitti e dei Mendicanti, così come sul sistema assistenziale veronese nel suo complesso.

approvata dalla magnifica Città de i Derelitti, et Derelitte, soccorrer à i bisognosi di tutti, et ordinare in questa Città l'elemosina, dando in una volta ordinatamente quello, che si suol dare in molte⁹⁴.

Tenendo a modello ciò che era stato realizzato in quegli anni in altre città della penisola italiana, il vescovo di Verona, dunque, faceva presente la necessità di unire all'Opera dei Derelitti quella dei Mendicanti⁹⁵; una necessità, questa, alla quale veniva dato seguito in quello stesso anno dalle autorità cittadine con l'approvazione degli *Ordini con i quali si è introdotta nella città di Verona la Santissima Opera de Mendicanti, unita a quella de i Derelitti*, che al capitolo primo stabilivano:

Che ampliandosi l'Opera de' Derelitti et Derelitte instituita l'anno 1573, sia deliberato, che ivi si accettino i fanciulli, et fanciulle, et ogn'altra sorte di poveri, eccettuando i fanciulli, et fanciulle et altri compresi da i capitoli, et ordini delle sante case di Pietà, Misericordia, e dell'ospitale di S. Giacomo, havendo però riguardo di gravar meno che sia possibile le case de Derelitti; cioè di non accettar quelli, che specificatamente in detti altri luoghi hanno ricetto, ò altra persona, che escluso il mendicare possa con honesto esercizio provvedersi per se stessa; salvi nel resto, et illesi gli ordini di esse case de Derelitti, à questi non repugnanti⁹⁶.

Sulla base di tali disposizioni si delineava una situazione per cui, se la Casa della Pietà accoglieva i bambini esposti di età inferiore ai 5 anni⁹⁷, all'Ospedale della Misericordia competeva la cura dei fanciulli abbandonati residenti in città dai 5 ai 12 anni, e all'Ospedale di S. Giacomo quella dei leprosi, scabbiosi e rognosi, «tutto il rimanente dei poveri» veniva accettato nel Luogo dei Derelitti e Mendicanti», che in questo modo si trovava a gestire i *pupilli* e le *pupille* privi di ogni tutela familiare provenienti dal territorio, così come tutti i *miserabili*, sia uomini che donne, che non erano accolti negli altri ospedali⁹⁸.

⁹⁴ *Ibid.*, cc. 130r-130v.

⁹⁵ Sulle origini dell'Opera dei Mendicanti e sulla sua unione con l'Opera dei Derelitti si vedano anche: *Dello stato della chiesa veronese nel MDCVII*, cit., p. 18; Fanelli, *Storia degli ospedali di Verona*, cit., pp. 181-182.

⁹⁶ *Ordini con i quali si è introdotta nella città di Verona la santissima Opera de' Mendicanti unita a quella dei Derelitti*, cit., c. 131v.

⁹⁷ Il problema dell'infanzia abbandonata era ben presente al Valier, come mostra la notifica di scomunica data alle stampe il 13 ottobre 1589 e disposta per coloro che abbandonavano i propri figli presso la Casa della Pietà e per coloro che, dopo averli abbandonati, si recavano presso l'ospedale per chiedere i figli a balia. Tali provvedimenti andavano a ribadire quanto indicato nel breve emanato da Paolo III nel 1548, che era stato pubblicato nuovamente il 1° ottobre 1589 per ordine dello stesso Valier. Il documento valeriano, un tempo conservato presso la Biblioteca civica di Verona (b. Stampe 14.l.2, FV 34, *Scomunica contro quelli che commettono fraude così nell'esperre come nel pigliar Creature alla Venerabil Casa della Santa Pietà di Verona*, Verona, [Sebastiano Dalle Donne], 1589), risulta al momento non reperibile. Per una descrizione e un commento sul documento si rimanda, rispettivamente, a: Carpanè, Menato (edd.), *Annali della Tipografia veronese del Cinquecento*, cit., Vol. II, p. 625; e a Marini, Marini (edd.), *L'ospedale e la città*, cit., scheda 12, pp. 233-235.

⁹⁸ *Ordini con i quali si è introdotta nella città di Verona la santissima Opera de' Mendicanti*

Nel 1590, secondo quanto riferisce ancora il Canobbio nelle sue note di commento ai capitoli del regolamento dell'Opera dei Derelitti e dei Mendicanti, questa poteva contare su sessanta protettori, «la maggior parte gentiluomini principali, et honoratissimi mercanti», aveva centoventi uomini e centotrenta donne ricoverati nelle sue strutture e gestiva circa millecinquecento poveri a domicilio, per una spesa di mantenimento complessiva pari a ottomila ducati⁹⁹. Cifre considerevoli, queste che, da una parte, testimoniano come la soluzione dell'internato fosse riservata solo a un nucleo ristretto di persone povere e come la maggior parte del lavoro di assistenza si svolgesse fuori dai reclusori; e dall'altra, attestano una crescita rapida e consistente della pia opera, che per essere gestita al meglio richiedeva un ulteriore cambiamento. Difatti, il 13 aprile 1602 le magistrature cittadine decidevano di rendere indipendente l'Opera dei Mendicanti da quella dei Derelitti e delle Derelitte, riservando a quest'ultima la cura e l'accoglienza dei fanciulli e delle fanciulle poveri, e lasciando alla prima il governo e l'assistenza delle persone adulte di ambo i sessi, che «per estrema povertà fossero necessitate à mendicare»¹⁰⁰.

Fu così che il 21 ottobre 1602 l'Ospedale dei Mendicanti apriva ufficialmente i battenti in contrada Santo Stefano, con una solenne cerimonia introdotta dal «gravissimo sermone» di Agostino Valier in lode dell'istituto e seguita da una «bella processione dalla cathedrale al loco de' Mendicanti», con la quale le principali autorità laiche e religiose, il coadiutore Alberto Valier, i rettori, il priore e i governatori della pia opera, insieme a «una moltitudine grande de' nobili, de' cittadini, et del popolo», accompagnarono l'ingresso dei poveri mendicanti nell'ospedale¹⁰¹. Questo nutrito corteo costituiva, in fondo, l'espressione

unita a quella dei Derelitti, cit., c. 136v.

⁹⁹ *Ibid.*, cc. 136v-137r.

¹⁰⁰ *Capitoli et ordini per lo governo della santissima Opera de' Mendicanti, introdotta nella città di Verona l'anno 1602 insieme con le parti di detta magn. città*, In Verona, nella stamperia di Angelo Tamo, 1605, p. 9.

¹⁰¹ *Ibid.*, pp. 27-28.

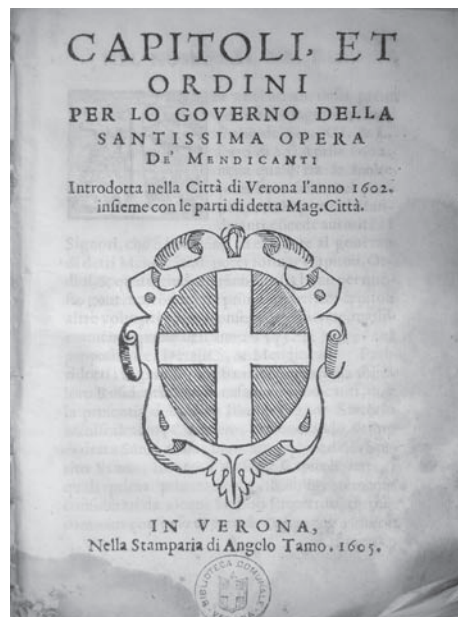


Fig. 6. Frontespizio del testo *Capitoli et ordini per lo governo della santissima Opera de' Mendicanti, introdotta nella città di Verona l'anno 1602 insieme con le parti di detta magn. città*, In Verona, nella stamperia di Angelo Tamo, 1605 (Biblioteca civica di Verona, collocazione: D.159.24; foto a cura dell'A.).

tangibile di un certo desiderio corale di ordine sociale, percepito non tanto – o per lo meno non solo – come aspetto indispensabile per mantenere la pace pubblica, ma anche e soprattutto come condizione imprescindibile per garantire l'ordine morale del singolo e della comunità tutta. L'Ospedale dei Mendicanti rappresentava una delle tante risposte messe in campo da confraternite, magistrature cittadine ed autorità vescovile per tenere sotto controllo la povertà e, più in generale, le situazioni di pericolo e di marginalità presenti nel contesto urbano. Ad esso si affiancavano provvedimenti, come il divieto di mendicare in città, con la sola eccezione delle persone cieche, e l'espulsione dei mendicanti forestieri, il cui adempimento era affidato a quattro deputati appartenenti all'Opera dei Mendicanti e dei Derelitti e poi solo all'Opera dei Mendicanti, che erano designati con il titolo molto eloquente di «espurgatori»¹⁰².

L'Ospedale dei Mendicanti, tuttavia, come le istituzioni assistenziali ed educative richiamate fin qui, non muoveva solo dall'idea di separare in ambienti chiusi e protetti alcuni soggetti considerati a rischio, per via, in questo caso, della loro situazione di indigenza, ma era animato innanzitutto dalla volontà di offrire loro una possibilità di rigenerazione morale e sociale. L'istituto infatti, secondo una tendenza che divenne progressivamente sempre più diffusa nelle maggiori città italiane ed europee alla fine del XVI secolo¹⁰³, era caratterizzato da un preciso programma di formazione religiosa, scandito da preghiere mattutine e serali e da lezioni di dottrina cristiana nei giorni festivi, abbinato anche – sulla scorta del modello adottato per i fanciulli poveri dell'Opera dei Derelitti e delle Derelitte – all'apprendimento di un mestiere. Il lavoro, ancora una volta, si caricava di una connotazione morale e religiosa, in quanto consentiva di tenere lontani ozio e peccato e, soprattutto, diveniva un vero e proprio mezzo di redenzione¹⁰⁴. Quest'ultimo aspetto emerge dalla lettura del capitolo XXI dei *Capitoli, et ordini per lo governo della santissima Opera de' Mendicanti*, che recita:

Che i Mendicanti, et Mendicante, potranno ad ogni tempo dimandare di essere licenziati dalla casa, et il Governatore potrà dar loro buona licentia, havuto prima il parere del Sign. Priore, o Consegliero, potrà però il Governatore, ovvero il Settemanero accomandarli con

¹⁰² *Ordini con i quali si è introdotta nella città di Verona la santissima Opera de' Mendicanti unita a quella dei Derelitti*, cit., cc. 132r-132v; *Capitoli et ordini per lo governo della santissima Opera de' Mendicanti*, cit., pp. 12-13, 21.

¹⁰³ Interessanti sono le osservazioni di Pullan a proposito delle analogie/differenze dei sistemi caritativi sviluppati nei paesi cattolici e protestanti europei. Cfr. B. Pullan, *Povertà, carità e nuove forme di assistenza nell'Europa moderna (sec. XV-XVII)*, in D. Zardin (ed.), *La città e i poveri. Milano e le terre lombarde dal Rinascimento all'età spagnola*, Milano, Jaca Book, 1995, pp. 21-44, in particolare pp. 37-44.

¹⁰⁴ Cfr. A. Pastore, *Il problema dei poveri agli inizi dell'età moderna. Linee generali*, in Zamagni (ed.), *Povertà e innovazioni istituzionali in Italia*, cit., pp. 185-205, in particolare pp. 189-196 e S.J. Woolf, *The poor in Western Europe in the Eighteenth and Nineteenth centuries*, London-New York, Methuen, 1986; trad. it. *Porca miseria. Poveri e assistenza nell'età moderna*, Roma-Bari, Laterza, 1988, in particolare pp. 36-37.

qualche utile arte, eccetto però quelli, che saranno buoni, per lo bisogno, et servitio della casa. Et quando saranno stati un tempo in casa, et fatti del tutto sani, et in età di potersi con la industria loro procurarsi il vivere siano licenziati di casa per poterne accettare degli altri¹⁰⁵.

Da mendicante ozioso e senza fede ad artigiano operoso e timorato di Dio: questo è l'itinerario educativo proposto nell'Ospedale dei Mendicanti di Verona, in linea con la maggior parte delle istituzioni analoghe sorte in Europa in quegli anni in risposta al problema della mendicizia¹⁰⁶. L'opera pia dei Mendicanti di Verona rappresenta una delle molteplici espressioni di quell'idea di carità che, nel corso dell'età moderna, diviene vero e proprio «cemento sociale», «forza stabilizzatrice» e custode insostituibile di quel delicato equilibrio che consentiva la convivenza tra ceti diversi, alimentando contestualmente il bisogno di elemosina del ricco e rispondendo a quello di emendazione del povero¹⁰⁷.

Conclusioni

Reclusione ma anche rigenerazione, dunque; questa è la doppia cifra che contraddistingue tutto l'apparato caritativo-assistenziale veronese, che si inserisce certamente all'interno di quel disegno globale di razionalizzazione, classificazione e contenimento della 'marginalità', che caratterizza sempre più il contesto urbano europeo nei decenni a cavallo tra Cinque e Seicento, ma che va ben oltre il rigido modello interpretativo della grande reclusione e dello schema foucaultiano del «sorvegliare e punire»¹⁰⁸, collocandosi *in primis* all'interno di un progetto pedagogico più ampio, incentrato sull'interiorizzazione/adesione ai valori cristiani e, laddove possibile, sull'integrazione dei soggetti disciplinati all'interno della società. Di questo progetto il Valier, fulgido esempio di vescovo riformatore del periodo post-tridentino, determinato ad includere nella sua azione pastorale ogni momento, aspetto e condizione di vita del popolo dei fedeli, si fece principale animatore e guida, operando instancabilmente lungo il solco dell'esperienza episcopale gibertina.

Egli rafforzò e pose sotto il controllo vescovile quella vasta e multiforme rete di confraternite, ospedali e conservatori che, a partire soprattutto dalla seconda metà del Cinquecento, a Verona come nelle altre città del mondo cattolico – a cominciare dalla Milano di Carlo Borromeo, paradigma costante per tutti

¹⁰⁵ *Capitoli et ordini per lo governo della santissima Opera de' Mendicanti*, cit., pp. 25-26.

¹⁰⁶ Per un panorama sulle trasformazioni nell'organizzazione dell'assistenza ai poveri che interessò i paesi europei nel corso dei secoli XVI e XVII si veda a B. Geremek, *La pietà e la forza. Storia della miseria e della carità in Europa*, 3 ed., Roma-Bari, Laterza, 2003, pp. 123-187.

¹⁰⁷ Pullan, *Poveri, mendicanti e vagabondi*, cit., pp. 1046-1047.

¹⁰⁸ Cfr. M. Foucault, *Surveiller et punir. Naissance de la prison*, Paris, Gallimard, 1975; trad. it. *Sorvegliare e punire. Nascita della prigione*, Torino, Einaudi, 1976.

i vescovi del suo tempo e non solo¹⁰⁹ – riuscì a rispondere in modo sempre più mirato ai bisogni spirituali ma anche materiali della società del tempo, incoraggiando il perfezionamento spirituale dei singoli, alimentando devozioni popolari e manifestazioni di culto, offrendo aiuto a diverse categorie di persone in condizione di necessità (ammalati, prigionieri, esposti, donne senza famiglia, poveri vergognosi, mendicanti etc.) e favorendo, in alcuni casi, anche la vicinanza di persone di diverso *status* sociale, genere ed età. Il vescovo di Verona sostenne lo sviluppo di un sistema di pietà plurale e, se vogliamo, totale, all'interno del quale si attivarono tanti canali di espressione dell'esperienza religiosa, caratterizzati da molteplici forme organizzative e da una ricca varietà di protagonisti e di linguaggi, che si completavano ed integravano l'uno con l'altro, contribuendo tutti alla definizione di quella *civitas sancta* teorizzata dal Tridentino, in cui l'ordine esteriore diveniva espressione diretta dell'ordine interiore, e la salute del corpo specchio della *salus animarum*.

In questo gioco di riflessi e rimandi, che lega a doppio filo i tanti aspetti della vita umana, Agostino Valier non si attenne a un modello univoco e preconstituito, ma valutò di volta in volta le varie realtà in gioco, entrando in dialogo con esse, senza pretendere di riassorbirle tutte all'interno delle strutture parrocchiali e tenendo fermo l'obiettivo primario del suo ministero episcopale: la salvezza eterna del suo popolo. Le associazioni laicali vecchie e nuove, così come le numerose opere pie di antica e di recente fondazione furono individuate dal Valier, sin da subito, come gli strumenti privilegiati per la conquista e la santificazione della società, in quanto consentivano alla Chiesa di raccordarsi con essa, di arrivare dove clero e vescovo non potevano arrivare, agendo come causa ed effetto di un efficace processo di rinnovamento del laicato, portato avanti nel rispetto del pluralismo e delle specificità dei fedeli.

Certamente fu favorita e incoraggiata la diffusione delle confraternite del Santissimo Sacramento e delle compagnie del Rosario che, come si è visto, consentivano di sviluppare una rete di canalizzazione della pratica religiosa laicale su base parrocchiale e, dunque, in stretto raccordo con l'autorità centrale vescovile; certamente accanto a questi sodalizi fu promosso lo sviluppo delle Compagnie della Dottrina Cristiana che, come si è detto in altra sede¹¹⁰, avevano anch'esse un forte radicamento territoriale e consentivano di intervenire su un altro versante nodale del rinnovamento spirituale della vita dei fedeli, quello cioè della formazione religiosa; tuttavia non si procedette a un livellamento indiscriminato delle organizzazioni cittadine e delle confraternite ingabbiandole all'interno delle maglie del controllo vescovile.

¹⁰⁹ Basti pensare all'enorme influenza esercitata nel mondo cattolico dal modello normativo borromaico degli *Acta Ecclesiae Mediolanensis*. Cfr. E. Cattaneo, *La singolare fortuna degli "Acta ecclesiae Mediolanensis"*, «La scuola cattolica», n. 111, 1983, pp. 191-217.

¹¹⁰ E. Patrizi, «Per insegnarci con l'opere et con le parole la scienza della vera salute». *Le Scuole della dottrina cristiana di Verona al tempo di Agostino Valier*, «History of Education & Children's Literature», vol. 8, n. 1, 2012, pp. 299-320.

La Verona di Agostino Valier fu, al contrario, animata dalla volontà di valorizzare questo straordinario patrimonio attraverso un disegno di riorganizzazione complessiva della vita dei 'laici devoti', che coinvolgeva la sfera ecclesiale e quella della vita civile in modo inscindibile, mostrando il volto di un «cattolicesimo popolare» modulato a ridosso del tessuto sociale, capace di rivitalizzare e reinventare «formule organizzative e modi devozionali» a partire da bisogni, problemi e situazioni concrete, non solo su impulso dell'autorità vescovile, ma anche attraverso l'apporto congiunto di magistrature cittadine, esponenti dell'aristocrazia urbana, sacerdoti e religiosi, facendosi espressione di un organico processo di rinnovamento della vita religiosa dei fedeli, attuato prima ancora che attraverso regolamenti, decreti e imposizioni esteriori, per tramite del contatto diretto con i diversi corpi sociali, in una tensione costante verso un'idea di riforma realmente attiva, capace cioè di agire dall'interno, di penetrare cioè le strutture profonde del vissuto individuale e collettivo¹¹¹.

¹¹¹ Cfr. D. Zardin, *Tra chiesa e società 'laica': le confraternite in epoca moderna*, «Annali di storia moderna e contemporanea», a. 10, 2004, pp. 529-545, in partic. p. 544.

School for Tribes

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ABSTRACT: During his rule, Sultan Abdulhamid II (r. 1876-1909) had to recover as a financially, militarily, and politically sick of European man. After losing vast Christian territories in the Balkans he also had to initiate Pan-Islamic politics to protect unity and cope with European driven liberalist movements among the Arabs. Knowing that education is the most important factor in development and community enlightenment, Sultan Abdulhamid II attempted to reform and expand the Ottoman educational system by establishing several educational institutions for various purposes during his reign. Among them, the «Royal School for Tribes», established in 1892 in Istanbul, is distinguished from others with its aims and students.

EET/TEE KEYWORDS: History of Education; Ottoman Empire; School System; Tribes; Educational Reform; Nationalization; Turkey; XIX-XX Centuries.

Introduction

In order to prevent the breakup of the Ottoman state, Sultan Abdulhamid II (r. 1876-1909) established his politics based on three principals: 1) to establish and carry out the centralised structure of the state, 2) to establish a counter-balance against nationalist movement in the Balkans, which had taken a separatist form, and 3) to stand against European states' imperialist ambitions. Some of the actions that he took to realise these policies are; the arming of the Sanusis in Benghazi against the Italians¹, establishing a «troop of palace

¹ İ.H. Danişmend, *İzahlı Osmanlı Tarihi Kronolojisi* [Explanatory chronology of Ottoman

guardsmen» with the Albanians, establishing «Hamidiye Troops» with the Kurds², and working towards strengthening national unity³.

Arab nationalism in the 19th century was prevailing among the elite, yet had not reached the stage of action, political organisation or demanding independence. In order to establish and maintain compliance between Arab nationalism and Ottoman central government, Sultan Abdulhamid II founded new Turkish schools in the region in response to increasing foreign educational institutions and attempted to draw Arab interest by building «Hejaz Railroad»⁴.

One outcome of Sultan Abdulhamid II's policies was the establishment of «school for tribes» (*Aşiret Mektebi*)⁵. The main purpose of these schools was to ensure the Arab tribes' commitment to the Sultan and the caliphate. Therefore, the target audience of the school was the children of prominent Arab tribal chiefs. The first school was established in Istanbul to ensure the children of Arab tribal chiefs' commitment to the State by having them stay in capital city for four to five years. According to school regulations, another purpose of this was to provide opportunities for Arab tribes to benefit from the blessings of civilisation.

Against the European states' efforts to divide the Ottoman Empire by provoking first the non-Muslims in Balkans and then the non-Turkish Muslims in the Middle East, Ottomans had to take measures to reduce the effects of a European-inspired propaganda campaign among the Arabs, and re-establish a strong link between the State and Arab tribes. By doing so, central government would regain control over Arab tribes and avoid possible division in the future.

history], Vol. 4: M. 1703-1924, H. 1115-1342, İstanbul, Türkiye Yayınevi, 1972, p. 384.

² B. Kodaman, *Sultan II. Abdülhamid devri Doğu Anadolu politikası* [Eastern Anatolia politics during Sultan Abdulhamid II period], Ankara, Türk Kültürünü Araştırma Enstitüsü, 1987, p. 33.

³ C. Küçük, *Abdülhamid II* [Abdulhamid II], TDV İslam Ansiklopedisi, Vol. I, 1988, pp. 216-224, in particular p. 217.

⁴ İ. Ortaylı, *Osmanlı İmparatorluğu'nda Arap milliyetçiliği* [Arab nationalism in Ottoman Empire], in *Tanzimat'tan Cumhuriyet'e Türkiye Ansiklopedisi*, İstanbul, İletişim Yayınları, 1985, Vol. IV, pp. 1032-1035.

⁵ According to İbrahim Şirin school for tribes project belongs to Münif Pasha, who prepared and submitted a proposal to Şirvanize Mehmed Rüşdü Pasha around 1873-1874 (see İ. Şirin, *Münif Paşa'nın Tahran'dan gönderdiği devlet işleriyle ilgili lâyihası ve düşündürdükleri* [The bill on state affairs sent from Tehran by Munif Pasha and the thoughts on it], «Turkish Studies», vol. 3/4, Summer 2008, pp. 759-771, in particular p. 759). But that proposal was about training teachers among Arab, Kurd, and Turkoman tribe members, and giving Arab, Kurd and Turkoman nobleman short training in Istanbul or province centres. It did not mention establishing special schools for children of tribal members. To train tribe nobleman Münif Pasha was proposing to use already established schools such as teacher training schools for secondary education (Dârülmualimîn-i Rüşdî, est. 1848) and teacher training schools for primary education (Dârülmualimîn-i Sıbyan, est. 1872; see C. Öztürk, *Türkiye'de dünden bugüne öğretmen yetiştiren kurumlar* [From past to today teacher training institutions in Turkey], İstanbul, Marmara Üniversitesi Atatürk Eğitim Fakültesi Yayınları, 1998) or 351 secondary schools established in Istanbul or province centers by the year 1875 (see M. Demirel, *Türk eğitiminin modernleşmesinde rüşdiye mektepleri* [Rusdiye schools in Turkish modernization], «Türkler», vol. 15, 2002, pp. 45-61, in particular p. 54).

Schooling for tribes would provide two-way benefits within these goals; one to ensure the Arab tribes' commitment to the State, and the other to raise awareness against European inspired nationalist propaganda.

1. *The Preparations and the Opening*

Sultan Abdulhamid II appointed second chamberlain, aide-de-camp, major general Mehmet Nuri Pasha to prepare a bill on school for the tribes⁶. Mehmed Nuri Pasha completed and submitted the bill on June 21, 1892⁷, in which the purpose of the school was briefly described. Accordingly, through education the Arab tribes would become freed from ignorance and will be able to distinguish between right and wrong and thus not be affected by the separatist propaganda. To ensure this goal, the first school was established in Istanbul, which set an example for future schools for tribes, and was used to train teachers for them. The proposal also described the terms of application, curriculum and school administration. This proposal, which formed the basis for School for Tribes Regulations later, designed the school as follows:

1. Students trained in the school will be employed in appropriate services in their hometowns thus contributing to the development of their tribes.
2. Students to be admitted to school should be chosen from those between the ages of twelve and sixteen, and who are gifted both physically and mentally.
3. To achieve the expected benefits from the school, the school principal, teachers and civil servants, should be selected and appointed by the Ministry of Education among applicants who are Turkish and Arabic speaking, admired in every aspect, and able to teach the courses in the programme.
4. Officers should be appointed in involved provinces by the Ministry of Internal Affairs to inform tribes about the subject and encourage them to register their children in school. A specified number of students should then be selected from each tribe and sent to Istanbul.
5. Even though it is sufficient to admit 25-30 students in order to have 20-25 graduates per year, due to need it is better to admit 45-50 students in order to have 40-45 graduates for the first two years.

⁶ Some sources states Osman Nuri Pasha as the preparator of the proposal (see O. Ergin, *Türkiye maarif tarihi* [Turkey's education history], İstanbul, Osmanbey Matbaası, 1941, Vol. III, p. 975; A. Akpınar, *Osmanlı Devletinde Aşiret Mektebi* [Tribes for School in Ottoman State], İstanbul, Selçuk Kitabevi, Göçebe Yayınları, 1997, p. 20). However, the document used in this research states Mehmed Nuri Pasha as the preparator.

⁷ Hijri and Rumi calendar years were converted to the Gregorian calendar based on the 'calendar converter manual' (see Y. Dağlı, C. Üçer, *Tarih çevirme kılavuzu* [History translation guideline], Ankara, Türk Tarih Kurumu Basımevi, 1997).

6. Until the new school building is completed, an adequate number of buildings in Besiktas should be rented for school opening by the Ministry of Internal Affairs.
7. The school for tribes will be a boarding school, and students will wear specific uniforms.
8. The school's regulations and order should be similar to those of the Military School (*Mekteb-i Harbiye*) or the Royal School of Public Administration (*Mekteb-i Mülkiye-i Şahane*).
9. Students who wish to visit their hometown during the holiday season are free to do so, and if necessary they should be supported with a transportation allowance⁸.

Following the bill prepared by Mehmet Nuri Pasha, the Ministry of Education (*Maarif Nezareti*) was assigned for the foundation of the School for Tribes (*Aşiret Mektebi*), which was decided to be opened in July 3, 1892, and notification of the Sultan was desired with the school's regulation by making preparations to open the school on the date corresponding to the birthday of the Prophet Muhammad (Hijri; 12 Rabi' al-awwal 1310/Gregorian; October 3, 1892)⁹. On notification of this assignment to the Ministry of Education by the Grand Viziership on July 6, 1892, as a regulation was set up for the school by the Ministry of Education, the curriculum of the first two grades was also determined. The point that information was to be given at a later date regarding other practices that needed to be followed by the Ministry of Education along with these preparations carried out to be able to open the school in the aforementioned date was submitted to Majlis-i Mahsusa by the Minister of Education on July 9, 1892¹⁰. After the prepared two year curriculum and the school regulation with twelve articles that were also deemed appropriate by Majlis-i Mahsusa, a decree related to the subject was issued on July 23, 1892¹¹.

As a period of a few months remained until the date when the Sultan wanted the school to be opened, the regulation of the School for Tribes was rapidly prepared and kept brief. According to the regulation consisting of twelve articles;

The school called «Aşiret Mektebi», which was established for the education of children of Arab tribes, is a 5-year boarding school. Every year, smart students with proper physical structure between 12 and 16 years old, who will be selected among the children of the most respected Arab tribes situated in Syria, Aleppo, Bagdad, Basra, Mosul, Tripolitania, Yemen, Hejaz and Diyarbakir provinces and the autonomous sanjaks of Benghazi, Zor and Jerusalem, will be sent to Istanbul. The duty of recruiting students will be informed by the Ministry of Education to the abovementioned provinces three months before the

⁸ Başbakanlık Osmanlı Arşivi / Premiership Ottoman Archive (BOA), *DH. MKT, 1964/35*; BOA, *MF. MKT. 909/29*.

⁹ BOA, *İ. DH, 1283/101021*.

¹⁰ BOA, *İ. MMS, 131/5641*.

¹¹ *Ibid.*

beginning of each year. Every year, 40 students will be admitted to the school, although on the first year 50 students will be admitted and the number of students in the school will be 210 in total. All expenses of the students who will wear uniforms in the school will be compensated by the State and a scholarship of thirty kuruş will be given to every student per month. The school's internal administration will be executed according to the regulations of boarding *idadis*. After returning to their tribes, students who have graduated from the school will become teachers in the schools that were decided to be opened there, or they will be appointed to another suitable service. Implementation of the regulation will be carried out by the Ministry of Education.

The establishment objective of the school was also written in the regulation. Accordingly, the establishment objective of the School for Tribes was «to ensure that tribe people benefit from the blessings of civilisation and education and to increase their commitment to the caliphate post and the sultanate»¹².

Looking at the prepared regulation in general, it is understood that a great deal of attention was paid to the bill prepared by Mehmed Nuri Pasha. However, while regulating internal administration of the school as the *Mekteb-i Harbiye* ('Military Academy') and *Mekteb-i Mülkiye-i Şahane* ('Civil Service Academy') in the bill and having the school administration as *Dârüşşafaka* in the negotiation regarding the bill carried out in Meclis-i Hass-ı Vukela were recommended¹³, this was decided to be carried out according to the regulations of the boarding *idadis*.

In line with the bill¹⁴ dated July 03, 1892, the necessary preparations commenced for the provision of students to be brought from provinces for the school. In this direction, it was determined how many students would be taken from which provinces and governorships, and the provinces and governorships were notified. Accordingly, four students each were taken from Syria, Aleppo, Bagdad, Basra, Mosul, Tripolitania and Diyarbakir provinces and from Bengehazi, Jerusalem and Zor governorships; five students each were taken from Yemen and Hejaz provinces¹⁵. The total number of students demanded from provinces and governorships was fifty people and the prepared regulation also projected 50 students for the first year. In this context, the provinces and governorships initiated the necessary operations. It was stated in a memorandum dated 05.09.1892 regarding the subject written by the Ministry of Internal Affairs to the Grand Viziership that the respective provinces and sanjaks notified sending of 25 students from 50 students, no information was received regarding the subject from Syria and Aleppo provinces and Bengehazi, it was notified from Hejaz, Mosul and Diyarbakir provinces that the demanded 13 students could not be sent. Increasing the quota from four people each, which was allocated for Aleppo and Syria provinces, to six was proposed in

¹² *Ibid.* There is a copy of the regulation within the file.

¹³ BOA, *DH. MKT, 1971/125.*

¹⁴ BOA, *İ. DH, 1283/101021.*

¹⁵ BOA, *DH. MKT, 1971/125.*

the memorandum. If six people each came from these two provinces and also four people from Benghazi, the number of students would have reached 41 in total. Therefore, nine more students would have been needed in order to achieve the planned 50 students. Completing this shortage of nine people of as well as those who would remain short, in case of lacking number of students coming from Syria, Aleppo and Benghazi by selecting among the children of the Kurdish tribal chiefs in Bitlis, Van, Erzurum and Mamuretülaziz provinces was also among the proposals in the memorandum. The fact that the proposals were deemed appropriate by the Grand Viziership was notified to the Ministry of Internal Affairs on 07.08.1892¹⁶. As is seen, as also stated in the regulation of the School for Tribes, even though it was designed for the children of Arabic tribes, the children of Kurdish tribes were also included in the school even before the school was opened. This situation was not specific to that year and also occurred in subsequent years (R; March 28, 1314/April 9, 1898), recruiting students from Bitlis, Van, Erzurum and Mamuretülaziz provinces continued¹⁷. With the additional inclusion of Albanian children in 1902, Aşiret Mektebi had a structure consisting of Arabic, Kurdish and Albanian children. Due to a decision that was made, twenty people among Albanian children, who held the required conditions, were admitted to the school. 10 of these students came from Kosovo and 10 from Ioannia, Monastir and Shkodër¹⁸.

Recai Efendi was appointed to the school principality on September 25, 1892 and Abdulmuhsin Efendi, one of the civil servants of *Maârif Muhasebe* ('Accounting of Education'), was appointed to the deputy principality. Recai Efendi was the deputy principal of the Civil Service Academy and when he was appointed to the principality of the School for Tribes he also kept the duty of the deputy principality of the Civil Service Academy¹⁹. One day, after the appointment operation, the Ministry of Education was notified in order to execute procedures regarding appointment²⁰. The fact that Recai Efendi's duty of the deputy principality of the Civil Service Academy with his assignment to the principality of the School for Tribes was not terminated is an indicator that the principality appointment carried out was of a temporary nature. As a matter of fact, seven days after this appointment, a new assignment of principal for the school materialised even before the school was opened. Ali Nazima Bey, the lesson commissioner of Mekteb-i Sultani, was assigned to the school principality²¹. Nevertheless, assignment operation was carried out

¹⁶ BOA, BEO, 66/4880.

¹⁷ BOA, MF, MKT, 397/5.

¹⁸ BOA, MF, MKT, 658/38; İ. MF, 8/1320 C-4.

¹⁹ BOA, İ. MF, 1/1310 Ra-03.

²⁰ BOA, BEO, 77/5771.

²¹ BOA, İ. HUS, 4/1310 Ra-052.

before opening the school, execution of assignment operations was notified to the Ministry of Education after opening the school on November 21, 1892²².

Following the completion of preparations, the school was opened on October 03, 1892 (R; September 21, 1308) as planned²³. The school began its activities in a special office allocated from Akarat-ı Seniyye as planned in the bill of Mehmed Nuri Pasha²⁴. In fact, the Ministry of Education objected to this suggestion. The Ministry's reason for objecting was that there was no building suitable to be transformed into a school building by combining them both singly and jointly due to the fact that Akarat-ı Seniyye was essentially built in a European architectural style as a dwelling. The Ministry wanted two buildings in Besiktas to be organised as school buildings²⁵. Taking this objection of the Ministry of Education into consideration, allocating the palace in Kabatas, in which the Esmâ Sultan was residing, to the School for Tribes to be opened and allocating deceased Huseyin Avni Pasha's and one of the former grand viziers Ali Pasha's houses on the coast to the Esmâ Sultan through buying them were ordered in the decree dated July 23, 1892 regarding opening of the school²⁶. However, due to the fact that the palace belonging to the Esmâ Sultan could not be prepared²⁷, as also stated above, the school was opened in Akarat-ı Seniyye. The school completed its first academic year there. However, due to the fact that its building was not sufficient for the present students and the prospective students for the second year, it was decided to move the school to its new building in Kabatas due to a decree dated October 10, 1893. In fact, some parts of the building, where the school was moved to, were in need of renovation. However, despite this shortcoming, it was decided that moving to non-repaired parts of the building would be appropriate until renovation was completed²⁸. This decision was implemented one day after the date of the decree (October 11, 1893) and the school was moved to its new building allocated in Kabatas under supervision by the Minister of Education Zuhtu Pasha²⁹. On July 15, 1898, two houses located next to the building of the School for Tribes were decided to be included in the school by purchasing one at a cost of 38,000 kuruş and the other at a cost of 40,000 kuruş³⁰.

²² BOA, BEO, 110/8213.

²³ Mahmud Cevad İbn'üş Şeyh Nâfi, *Organizational History and Practices of the Ministry of National Education*, edited by M. Ergun, T. Duman, S. Aribas, H.H. Dilaver, Ankara, Millî Eğitim Bakanlığı Yayınları, 2002, p. 292.

²⁴ BOA, MF. MKT, 184/44.

²⁵ BOA, BEO, 30/2219.

²⁶ BOA, İ. MMS, 131/5641.

²⁷ BOA, BEO, 70/5195.

²⁸ BOA, İ. HUS, 16/1311 Ra-156.

²⁹ BOA, MF. MKT, 184/44.

³⁰ BOA, İ. MF, 5/1316 S-3.

2. *Administrative Structure and Development of the School*

The Administration of the School for Tribes, which were opened as being affiliated to the Ministry of Education, was taken from the Ministry of Education and given to *Umum Mekatib-i Askeriye Nezareti* ('The General Directorate for Military Academies')³¹. In fact, before taking this decision, the School for Tribes had a connection to the General Directorate for Military Academies. On January 09, 1894, the school administration, which directly demanded the required vaccine tubes for non-vaccinated students from the General Directorate for Military Academies without notifying the Ministry of Education, received a warning from the Ministry of Education³².

It has been stated previously that a brief regulation was prepared for the School for Tribes during preparations for opening. Immediately after the opening of the school, a comprehensive guideline consisting of 74 articles was prepared for internal administration of the School for Tribes on October 25, 1892³³. In this guideline, general characteristics of the school, its administrative and teaching staff and their duties, rewards, punishments and exams were covered in depth. The first seven articles of the guideline also almost completely incorporated the regulation with 12 articles, which was previously prepared for the school. Contrarily, while provinces and autonomous *sanjaks*, from which students were to be brought, were stated in the regulation, this was not present in the guideline. Besides, unlike in the regulation, administrative personnel, who were to be employed in the school, were completely covered in the guideline.

2.1. *Administrative and Teaching Staff of the School*

The administrative and teaching staff of the school consisted of a principal, an internal and accounting official for carrying out the duty of the deputy principality, a clerk, the required number of teachers, supervisors, janitors, cooks, warehouse officials and hospital officials³⁴. The medical services of the school would be performed by one of the personal doctors of the Sultan assigned by him and also by a physician, surgeon and a pharmacist assigned by decree from the military³⁵. Assigning one of the Sultan's doctors for the school's medical services of course could not be put into the regulation without the sultan's instruction. This is a clear indicator of the importance given by

³¹ BOA, *i. HUS*, 34/1312 §-127.

³² BOA, *MF. MKT*, 192/54.

³³ BOA, *Y. MTV*, 73/99; There is the full text of the guideline within file.

³⁴ Guideline, Article 6.

³⁵ Guideline, Article 7.

Sultan Abdulhamid II to the School for Tribes. In the academic year 1894-1895 (R. 1310-1311), the administrative and teaching staff of the School for Tribes consisted of 25 people³⁶. In the following academic year, this number rose to 26³⁷. In the academic year 1900-1901 (R. 1316-1317), the number of school administrative and teaching staff was forty-seven. Only 11 of these officials were teachers³⁸. After two academic years the school staff reached 52. In parallel to the increase in staff, the number of students also rose to 13³⁹.

As also stated previously, Recai Efendi was appointed to school principality before the opening of the school. However, directly before the opening of the school, a new appointment for school principality took place and Ali Nazima Bey, the lesson commissioner of Mekteb-i Sultani, became the new school principal⁴⁰. Following the three-year principality of Ali Nazima Bey⁴¹, the school's deputy principal Abdulmuhsin Efendi was appointed to school principality as his replacement in 1895 (H. 1313) and he carried out the duty of school principality for 6 years⁴². In 1901, Nadir Bey was appointed to school principality⁴³. After performing his principality for two years until 1903⁴⁴, Nadir Bey was assigned to the membership of Cemiyet-i Rüşûmiye⁴⁵. It is understood from the State Yearbooks that the position of school principality was vacant for the next two years and the duty of assistant principal was executed by Kamil

³⁶ *Maarif-i Umumiye Nezaret-i Celilesi İdaresinde Bulunan Mekatib-i İbtidaiye, Rüşdiye, İdâdiye, Âliye ile Mekatib-i Hususiye ve Ecnebiyenin ve Dersaâdet'te Tahriri İcra Kılınan ve Taşrada Mevcut Bulunan Kütüphanelerin İstatistiği* (Statistics of Boarding Preparatory Schools, Secondary Schools, High Schools, Higher Education Institutes and Private Boarding Schools and Schools for Foreigners under the Administration of the Ministry of National Education and of Libraries, whose Registration in Dersaadet was executed and which were Located in Boondocks), Peculiar to Finance of the 1310-1311 Academic Year, Dersaâdet, p. 7.

³⁷ *Maarif-i Umumiye Nezaret-i Celilesi İdaresinde Bulunan Mekatib-i İbtidaiye, Rüşdiye, İdâdiye, Âliye ile Mekatib-i Hususiye ve Ecnebiyenin ve Dersaâdet'te Tahriri İcra Kılınan ve Taşrada Mevcut Bulunan Kütüphanelerin İstatistiği* (Statistics of Boarding Preparatory Schools, Secondary Schools, High Schools, Higher Education Institutes and Private Boarding Schools and Schools for Foreigners under the Administration of the Ministry of National Education and of Libraries, whose Registration in Dersaadet was executed and which were Located in Boondocks), Peculiar to Finance of the 1311-1312 Academic Year, Matbaa-i Amire, 1318, p. 7.

³⁸ *Salname-i Nezaret-i Maarif-i Umumiye* (SNMU, 'Yearbook of the Ministry of National Education'), H. 1319, pp. 149, 150.

³⁹ SNMU, H. 1321, pp. 153, 154.

⁴⁰ BOA, İ. HUS, 4/1310 Ra-052.

⁴¹ *Salname-i Devlet (SD- State Yearbook)*, H. 1311, p. 312; H. 1312, p. 426.

⁴² SD, H. 1313, p. 454; H. 1314, p. 462; H. 1315, p. 291; H. 1316, p. 323; H. 1317, p. 307; H. 1319, p. 381. Abdulmuhsin Efendi was named as the school's deputy principal on the State Yearbook dated H. 1312.

⁴³ SNMU, H. 1319, p. 149. While Abdulmuhsin Efendi was named as the school's deputy principal on the State Yearbook dated H. 1319, Nadir Bey was referred to be the school's principal in the educational yearbook of the same date. It is understood from this information given in the yearbook that Nadir Bey was appointed as principal in place of Abdulmuhsin Efendi, who was the school principal, in H. 1319 (G. 1901/1902).

⁴⁴ SD, H. 1320, p. 397; H. 1321, p. 426.

⁴⁵ BOA, İ. HUS. 108/1315 Ca-67.

Efendi⁴⁶. Kamil Efendi was appointed to principality of the School for Tribes in 1906 and he carried out this duty until the closure of the school⁴⁷.

2.2. *Security and Discipline in the School*

Students of the School for Tribes were kept under strict control regarding both education and daily life. Teachers recorded their thoughts about the students' efforts in their courses and their behaviour each day in their notebooks. The notebooks were checked by the principal every evening and to accomplish what was necessary, the notebooks were signed by writing the inscription *it was seen* at the end of that day's page of notebooks⁴⁸. Teacher evaluations written in the daily course notebooks of students were read out loud by the principal in the classroom by way of summarising them in another notebook every Thursday and what was necessary was accomplished regarding the efforts and behaviour of each student⁴⁹. Weekly incidents were also inscribed in a notebook and stored. It was essential that these notebooks were preserved intact. In the case of erroneous writing, this erroneous writing would be crossed out in a way that the writing would be readable and a new expression would be written over this mark⁵⁰.

It was prohibited for students to have contact with the world outside of the school without the school principal's permission⁵¹. Letters written by students to their families or others were read and, if necessary, they were delivered to the school principal for correction⁵². Students' entry to courses, having breaks and their breaks were under the control of supervisor. Unless teachers came to the classroom, supervisors did not leave the classroom and unless supervisors came to the classroom, teachers did not leave the classroom. Entering and exiting classes was in an orderly fashion as well. Entries and exits were announced with

⁴⁶ SD, H. 1322, p. 444; H. 1323, p. 489.

⁴⁷ SD, H. 1324, p. 538; H. 1325, p. 538; H. 1326, p. 545.

⁴⁸ Guideline, Article 10.

⁴⁹ Guideline, Article 11.

⁵⁰ Guideline, Article 12. In his work, Eugene L. Rogan considered the notebook written on Thursdays, in which teacher evaluations were summarised, and the notebook, in which weekly incidents were inscribed, as notebooks written by students. However, these were notebooks prepared by the school officials. Besides, the fact that it was essential that these notebooks in which weekly incident records were kept were preserved intact incident records were kept, can be considered to be regulated for preventing any infraction, not for strict control of student writings as claimed by the author. See E.L. Rogan, *Aşiret Mektebi: Abdülhamid II's School for Tribes (1892-1907)*, «International Journal of Middle East Studies», vol. 28, n. 1, February 1996, pp. 83-107, in particular p. 94.

⁵¹ Guideline, Article 15.

⁵² Guideline, Article 20.

a trumpet, bugle or whistle and carried out in pairs in an orderly fashion under the control of supervisors. Students were also under the control of supervisors during their meals, ablutions and sleep times⁵³.

Despite of the strict practices on students and the School for Tribes strict disciplinary practice in the school, this situation was not only valid for this school. A strict practice was also the case for students of provincial boarding high schools (*idadis*) that were continuing their educational activities in the same period as the School for Tribes⁵⁴.

Although the security and discipline in the School for Tribes possessed various similarities with the other boarding schools, different practices were also the case in the school due to specific characteristics of this school. First of all, the school management was handed over to the Ministry of Education at first and approximately three years later it was assigned to the General Directorate for Military Academies. Students of the School for Tribes were coming to Istanbul from very distant regions and they were only able to go to their hometowns once in two years provided that their costs were compensated by the State. This duration could sometimes be extended to three years⁵⁵. Permanent co-existence of Arabic, Kurdish and Albanian students in the school further complicated school security. As a matter of fact, considerable fights occasionally broke out among the students⁵⁶. Due to the reasons stated above, providing security of the School for Tribes was more difficult than in civilian schools. As a matter of fact, one military officer, fourteen soldiers, one police commissioner and three gendarmeries were permanently stationed within the school in order to provide security and a barrack for their accommodation was demanded (June 25, 1903)⁵⁷. When the School for Tribes was closed and replaced by Kabatas High School (*Idadi*), the school Principal Hasan Tahsin demanded that the soldiers in the school be taken out by stating that soldiers were not required for the safety of civilian schools (August 13, 1908)⁵⁸.

Various rewards and punishments were also determined to control educational activities of students. There were three types of rewards called *Âferin*, *Tahsinname* and *Mükâfat* in the school for students. *Tahsinname* corresponded to five *Âferins* and *Mükâfat* corresponded to four *Tahsinnames* or twenty *Âferins*. Students who studied hard for their lessons and performed their duties completely could be given one or two *Âferin* certificates by teachers. Students who were not punished for one month received a score of nine or

⁵³ Guideline, Articles 23, 37, 38, 39, 40.

⁵⁴ See, F. Demirel, *Mekteb-i İdâdî* [İdadi schools], Basılmamış Doktora Tezi, Erzurum, Atatürk Üniversitesi, 2010, pp. 63-83.

⁵⁵ BOA, İ. MF. 6/1318 Ra-03.

⁵⁶ See, Akpınar, *Osmanlı Devletinde Aşiret Mektebi* [Tribes for School in Ottoman State], cit., p. 76.

⁵⁷ BOA, MF. MKT. 718/60.

⁵⁸ BOA, MF. MKT. 1073/8.

ten from supervisors due to exhibiting positive behaviour in deliberations and showing an effort or received at least twenty *Âferins* from teachers, were also given a *Tahsinname* three months later. Students who were not punished for three months and received a score of nine and ten by supervisors and teachers were given a *Mükâfat*. Students who received two *Mükâfat* certificates in six months were also given a book as a gift. The students who ranked first in different lessons in private and general examinations were given a *Mükâfat* certificate, the students who ranked second were given a *Tahsinname* certificate and the students who ranked third were given two *Âferin* certificates. If a student who managed to collect eighty *Âferins* or the equivalent *Tahsinname* and *Mükâfat* certificate handed over these certificates to the principal, these certificates were annulled by giving that student a book with an adorned volume⁵⁹.

When it comes to punishments, there were six types of punishment called Admonition (*Tevbih*), Detention (*Tevkif*), Standing up (*Ayakta Durdurmak*), Non-permission (*Izinsizlik*), Overt reprimand (*Tekdîr-i Alenî*) and Imprisonment (*Hapis*). Students who did not study and exhibited inappropriate behaviour in lessons or discussions were given admonition punishment and recorded in a notebook. The student was notified on receiving an admonition punishment in their break by the deputy principal when the student was alone. Students who had no understanding of the course, did not perform their duties, insulted the other students, made fun of them and continued behaviour that caused them to receive admonition punishment, were given detention punishment. A student who received detention punishment was made to complete writing practice in classroom during break time. In cases when detention and admonition punishments were not deemed sufficient, the student would have to stand up for an appropriate period on a convenient spot in the classroom provided that the student should listen to course and this situation was inscribed in a notebook. The teacher or supervisor could not record more than two detention punishments in a lesson. A student who received five detentions or three standing up punishments in one week was forced to remain in school that week by not allowing them to take a Friday break. For students, staying outside of the school without permission by the school administration was absolutely prohibited. Even if a student who was absent in the evening attendance check came to school after attendance check, he/she was regarded as staying outside and the decided punishment was implemented. A student who received four punishments of not leaving the school in a month was reprimanded by the principal in front of all the teachers, supervisors and students. A student who received more than four punishments of staying in the school or committed an unusual crime was given the punishment of overt reprimand. An admonition punishment could be forgiven by returning one *âferin* certificate, detention punishment could be forgiven by returning two, standing up punishment

⁵⁹ Guideline, articles 48, 49, 50, 51, 53, 54, 56.

could be forgiven by returning three and non-permission punishment could be forgiven by returning five certificates. An overt reprimand punishment could not be forgiven⁶⁰.

2.3. Examinations

Students of the School for Tribes were subjected to four exams in a year, including one general and three private examinations. Private examinations were conducted at times determined by the administration. If a student received a score of three or below in a course in a general exam, he/she was regarded as failing the course. If a student failed more than two courses, that student could not pass to an upper grade. If a student failed one course, he/she would be subjected to three more exams in an appropriate period and if that student still could not pass the course in the third exam, he/she failed the class. It was decided in the guideline prepared that for the time being, general examinations would commence at the beginning of the month *Sha'aban* and finish at the end of *Sha'aban*, courses were given a break during Ramadan and the academic year would re-start on the 5th of Shawwal⁶¹. However, it was also stated at the end of the guideline that if deemed necessary, examination dates could be changed by the decision of *Meclis-i Maârif* ('Council of Education') with respect to experience to be gained in the future. With the decision taken in this direction, the Rumi calendar was based on the examination dates of students instead of the *Hijri* calendar and examinations commenced in June⁶².

2.4. The Number of Students

In the bill prepared by Mehmed Nuri Pasha for the opening of the School for Tribes, the total number of students in school as 100-120 was deemed sufficient in order to be able to graduate some 20-25 students each year. However, in the bill, the need to admit 45-50 students in the first two years in order to have around 40 graduates in these years was also stated. In the regulation prepared for the School for Tribes, admitting fifty students into the school in the first year and admitting forty students each in the following years and thereby having 210 students in total in the school were decided.

⁶⁰ Guideline, articles 58, 59, 60, 61, 62, 63, 64, 65, 66, 67.

⁶¹ Guideline, articles 68, 71, 72, 73, 74.

⁶² BOA, Y. EE. d. 962.

The document, which was prepared by the management of the School for Tribes on 18.04.1901 (R. April 05, 1317), and reported the number of students enrolled and graduated from the school from its opening to that day, states that 58 students were enrolled in the school in the first year it was opened (1892) and 23 students were enrolled the following year⁶³. However, it is stated in the statistics prepared by the Ministry of Education for the academic year 1894-1895 (R. 1310-1311) that 97 students were transferred from the academic year 1893-1894 to the academic year 1894-1895⁶⁴. This data shows a contradiction with 16 people between two sources. Again, it is understood from the document prepared by the school principality that 38 students were admitted into the school in 1894. It is also stated in the statistics of the Ministry of Education that 56 students were admitted into the school in the 1894-1895 academic year, but within that year 18 students left the school. The two sources stated for that academic year confirm each other. However, this situation demonstrates that the school principality made an evaluation as of the end of the academic year.

It is understood from this that the given number does not show the number of students enrolling into the school in that year but actually shows that an increase occurred in that year only in the number of students in the school. Again, it is understood from the stated statistics that the School for Tribes transferred 135 students to the subsequent academic year. However, it is understood in the notebook, which was prepared regarding examinations of students of the School for Tribes conducted in 1895 (June 1311) showing student names and the marks they received from exams, that 33 students from the first year, 26 students from the second year, 21 students from the third year and 29 students from the fourth year took the exam⁶⁵. It is understood from the notebook that a total of 109 students participated in exams at the end of that academic year. Looking at this, the total number of students of the school was 119 according to the document prepared by the school management for the 1894-1895 academic year, 135 according to the statistics prepared by the Ministry of Education and 109 according to the notebook prepared related to examinations. As is understood, there is a contradiction among sources in the data regarding the number of students. Even though there is a contradiction among sources, the fact that the given numbers are close to each other presents an opportunity for evaluation. Looking at the subsequent years, it is understood that 21 students attended the school and 14 students left the school in the 1895-1896 academic year. At the end of that academic year, 46 students graduated from the School for Tribes and 96 students were transferred to the next academic year⁶⁶. In fact,

⁶³ Istanbul University Library, TY, Nr. 9514.

⁶⁴ *Statistics of the Ministry of National Education*, 1310-1311, p. 7.

⁶⁵ BOA, Y. EE. d. 962.

⁶⁶ *Statistics of the Ministry of National Education*, 1311-1312, p. 7. The document prepared by the school management also confirms that 46 students graduated that year (Istanbul University Library, TY, Nr. 9514).

there were not 46 students in the last year of the school in that academic year. However, the Sultan ordered that half of 26 students, who were entitled to graduation in that year, in addition to 25 students, who passed to the fifth grade, be sent to the Military Academy and other half to the Civil Service Academy to continue their education⁶⁷. While this was intended to graduate 51 students in that academic year, only 46 students were able to graduate. This situation also explains why the school could not produce graduates the following year⁶⁸. While the number of students in the school was 132 in the 1879-1898 academic years, this number went up to 192 in the 1898-1899 academic year⁶⁹. The number of students in the School for Tribes was 139 in the 1900-1901 academic year⁷⁰. The number of students in the school dropped to 120 in the 1902-1903 academic year⁷¹. Although the number of students in the School for Tribes was projected as 200 in its regulation by means of admitting 40 students each year, as already seen this target could not be achieved. This situation demonstrates that the prediction stated by Mehmed Nuri Pasha in his bill that the total number of students in the school should be around 100-120 to graduate 20-25 students or so per year was more realistic.

2.5. *The School Curriculum*

In the bill prepared for the foundation of the School for Tribes, instructing the courses of Quran reading, Ottoman language (rules and spelling), Arabic sentence and word knowledge, basic applied geometry, general history (in brief), Islamic history, excellent Ottoman history, knowledge of nature (in brief), religious and catechism knowledge, Turkish and Arabic writing, *fiqh* (as much as needed), perfect calculation, physics and chemistry (in brief), geography, agriculture and animal husbandry (as much as needed) was proposed. In spite of the fact that the courses were determined in this way in the bill, the omission of those that were deemed unnecessary from these courses and adding the courses considered necessary were assigned to the Ministry of National Education. Besides, it was also stated in the bill that the textbooks to be used should be examined and determined by a commission consisting of educated people⁷².

⁶⁷ BOA, *İ. HUS.* 49/1314 R-64.

⁶⁸ Istanbul University Library, *TY*, Nr. 9514.

⁶⁹ BOA, *İ. MF.* 5/1317 Ş-3.

⁷⁰ *SNMU*, *H.* 1319, s. 150.

⁷¹ *SNMU*, *H.* 1321, s. 154.

⁷² BOA, *DH.* *MKT.* 1964/35; BOA, *MF.* *MKT.* 909/29.

Due to the fact that there was a limited amount of time allocated for the opening of the school, first of all, the academic programme of the first two grades was prepared. According to the curriculum prepared for the first two years, the courses were as follows:

- *Courses of the First Grade:* Arabic alphabet, Ecza-i Şerife (Thirty parts that bring the Quran into being), Turkish reading, Calculation, Hatt-ı Rika.
- *Courses of the Second Grade:* Quran, Catechism, Turkish reading and spelling, Calculation, Hatt-ı Rika⁷³.

These courses were present among the courses proposed for the school in the bill prepared by Mehmed Nuri Pasha. However, it was stated in negotiations on the bill carried out in *Meclis-i Hass-ı Vükela* (the ‘Council of Ministers’) that courses should begin from *elifba* (‘Arabic alphabet’) in regard to the students who had never received education, among the students to arrive that year, the programme should be limited and the programme should be formed in a way that would include the subjects towards increasing students’ respects and loyalties to the Sultan in compliance with opening objective of the school and courses were decided to be prepared accordingly⁷⁴. Looking at the courses of the first two grades, it is understood that the courses that were easier to learn were selected for the first two grades by taking the Council’s decision into consideration.

The notebook which was prepared regarding the exams of students of the School for Tribes conducted in 1895 (June 1311) and in which the student names and marks received from exams were written shows the courses given in the first, second, third and fourth grades of the school as of that year. Accordingly, the courses given in the first four grades of the School for Tribes are as follows⁷⁵.

- *Courses of the First Grade:* Quran, Catechism, Esmâ’-i Türkiye, Dictionary, Calculation, Spelling, Calligraphy.
- *Courses of the Second Grade:* Quran, Tajwid, Ulûm-ı Diniyye, Dictionary, Calculation, Turkish reading, Spelling, Hatt-ı Rik’a.
- *Courses of the Third Grade:* Quran, Tajwid, Ulûm-ı Diniyye, Sarf-ı Osmanî (Ottoman grammar), Calculation, Turkish reading, Ottoman geography, Islamic history, Spelling, Hatt-ı Rik’a.
- *Courses of the Fourth Grade:* Tajweed Quran recitation, Ulûm-ı Diniyye, Arabic, Persian, History, Ottoman grammar, Usûl-i Kitabet ve mla (Method of Literary Composition and Spelling), General Geography, Calculation, Malûmat-ı Mütenevvia, Hutut.

⁷³ BOA, I. MMS, 131/5641.

⁷⁴ BOA, DH. MKT, 1971/125.

⁷⁵ BOA, Y. EE. d. 962.

The school courses underwent various alterations in the course of its history. As some courses such as Hatt-ı Fransevî (French Calligraphy) and Painting were included in the school curriculum⁷⁶, some courses were also omitted from curriculum. Looking at curriculums of the School for Tribes given in the Educational Yearbooks dated H. 1316, 1317 and 1318, these changes are observed.

Five-year curriculum of the School for Tribes is as follows in yearbooks stated:

- *Courses of the First Grade:* Quran, Elifba (Arabic Alphabet), Ulûm-ı Diniyye, Catechism, Turkish reading, Spelling, Training.
- *Courses of the Second Grade:* Quran, Tajwid, Ulûm-ı Diniyye, Turkish reading, Dictionary, Calculation, Spelling, Calligraphy, Training.
- *Courses of the Third Grade:* Quran, Tajwid, Ulûm-ı Diniyye, Kısas-ı Enbiya, Turkish grammar, Turkish reading, Dictionary, Spelling, Calligraphy, Calculation, Geography, French, French Calligraphy, Training.
- *Courses of the Fourth Grade:* Quran, Tajwid, Ulûm-ı Diniyye, Arabic Grammar, Turkish Syntax, Persian, Islamic History, Turkish Literary Composition, Geography, Calculation, Calligraphy, Malûmat-ı Mütenevvia (Miscellaneous Information), Painting, French, French Calligraphy, Training.
- *Courses of the Fifth Grade:* Quran, Tajwid, Ulûm-ı Diniyye, Arabic Syntax, Persian, Ottoman History, Kavaid-i Osmaniye, Turkish Reading and Writing, Turkish Discussion, Geography, Calculation, Geometry, Calligraphy, Miscellaneous Information, Sanitation, Usul-i Defteri, French, French Calligraphy, Painting, Foot Drill⁷⁷.

According to the curriculum given in the Educational Yearbook dated 1319, the French course was omitted from curriculums of the fourth and fifth grades, only the French course in the third grade was maintained. In addition, the French Calligraphy course was also omitted from the curriculum⁷⁸.

Looking at the curriculum of the School for Tribes presented in the Educational Yearbook dated 1321, it is understood that various changes were made in the curriculum. The Practical Turkish course was added to each grade with changes made. The Dictionary course was omitted from the second grade. Kısas-ı Enbiya, Turkish Grammar and Dictionary courses were omitted from the third grade. In addition, the Islamic History course in the fourth grade was taken to the third grade. The courses of Turkish Syntax, Calligraphy, Miscellaneous Information and Painting were abolished in the fourth grade

⁷⁶ BOA, MF. MKT. 439/30.

⁷⁷ SNMU, H. 1316, p. 296; H. 1317, p. 346; H. 1318, pp. 194, 195. This curriculum was given by Alisan Akpınar by using the works stated.

⁷⁸ SNMU, H. 1319, p. 148.

and the courses of Turkish Grammar, Ottoman History, Geometry, İlm-i Eşya and Ceza Kanunname-i Hümayûnu (Imperial Criminal Code of Laws) were added. In the fifth grade, Kavaid-i Osmaniye, Turkish Discussion, Calligraphy, Miscellaneous Information and Painting courses were abolished and the courses of Ottoman Language, Algebra, İlm-i Eşya and İlm-i Ahlak (Ethics) were added to the curriculum. In addition, the French course, which was only given in the third grade, was also completely omitted from the curriculum⁷⁹.

3. Alumni of the School for Tribes

It was stated in the School for Tribes regulation that students who graduated from the school would teach in schools that were opened in their tribes when they return to their tribes, or they would be assigned another appropriate service⁸⁰. After opening, the School for Tribes became a school at the level of *Rüşdiye* ('Secondary School'), which constituted the second degree of elementary education in respect of semester. However, the fact that the Ministry of Education requesting from *Mekteb-i Askeriye-i Şahane Nezareti* ('Directorate for Military Academies') was to make a reform to bring the school into the elementary level to civil and military high schools, which were secondary education institutions, indicates that qualitatively, the school was not even at the same level as *Rüşdiye*⁸¹.

Of course, it could not be expected that the alumni of this school, which was in a very weak condition both qualitatively and quantitatively, would be successful in the military and civil service posts in which they will be appointed. Probably, due to this reason, Sultan Abdulhamid II ordered that half of the 26 students, who were entitled to graduate in the year when the school produced its first graduates (1896), in addition to 25 students, who passed to the fifth grade, be sent to the Military Academy in order to be trained in cavalry and infantry corps and the other half be sent to the Civil Service Academy to continue their education. Accordingly, students who were enrolled to the Military Academy and the Civil Service Academy, would graduate from these two schools by completing their education in a year and taking an exam⁸². In this way, students of the School for Tribes were at least ensured to graduate at the level of a secondary education institution. In this way, the students who completed the special degree of the Civil Service Academy were regarded as being at the same level as *idadi* graduates⁸³. For students who were sent to the Military

⁷⁹ SNMU, H. 1321, p. 152.

⁸⁰ BOA, İ. MMS, 131/5641.

⁸¹ BOA, MF MKT. 422/49.

⁸² BOA, İ. HUS. 49/1314 R-64.

⁸³ BOA, İ. DH. 1431/1322 Za-31.

Academy, a special class was formed in the school and courses were started immediately, as they were not at the same level of knowledge as that school's students. However, such practice was not carried out for students who were sent to the Civil Service Academy, and as students were placed in the first grade as guests, no course was given to them. As a result of correspondence carried out on the application of these students, a special class was also formed in the Civil Service Academy as in the Military Academy and courses were launched. It was decided to instruct the courses of Ulûm-ı Diniyye, Arabic, Persian, Turkish, Ethics and Calligraphy and necessary topics from the disciplines of economics, laws and administration to students of the School for Tribes in the Civil Service Academy⁸⁴. In the special class of the Military Academy, courses of Religion, Military Geography, Practical and Theoretical Drill, Military Training, Writing, Practical and Theoretical Topography, Finding Directions, Electrical Engineering, Map Drawing, Civilian and Military Criminal Law, First-Aid, Basics of Physics and Chemistry, Army Formation and Sword Drills were conducted⁸⁵.

Twelve students, who completed the School for Tribes and went to the Civil Service Academy, graduated in 1897 by finishing their one-year education. These alumni were appointed to official prospective kaymakam posts in various governorships with a monthly salary of 500 kuruş by the Sultan's order⁸⁶. Sultan Abdulhamid II personally attended to the first alumni assigned to public service and ordered those appointed to be sent to their hometowns as soon as possible for employment⁸⁷. In addition, students who completed their education in the Military Academy and the Civil Service Academy by graduating from the School for Tribes were also given ten liras as a gift from the Sultan⁸⁸.

The decision to appoint the students who completed the special class of the Civil Service Academy did not only incorporate that year's alumni, but also all alumni afterwards. However, as the number of alumni increased, various problems emerged in appointments. For instance, although twelve people, who graduated in 1903, were appointed to Mamuretülaziz and Tripolitania provinces, and Tripoli and Mount Lebanon governorates with 350 kuruş salary, various problems emerged as appropriation could not be found for their salaries. Besides, those who were appointed previously were voicing their discomfort because they could not be promoted to district governorate. As

⁸⁴ BOA, MF. MKT. 340/7.

⁸⁵ A. Akpınar, E.L. Rogan, *Aşiret, mektep, devlet; Osmanlı Devleti'nde Aşiret Mektebi* [Tribe, school, state; Tribes for School in Ottoman State], İstanbul, Aram Yayıncılık, 2001, p. 32.

⁸⁶ BOA, İ. DH. 1431/1322 Za-31. Ten of these twelve graduates were appointed to Yemen, Diyarbakir, Aleppo, Van, Tripolitania (2 graduates), Yemen (three graduates) and Mamuretülaziz governorships and two were assigned to Zor and Benghazi governorates. *SNMU, H. 1317*, pp. 582, 583.

⁸⁷ BOA, İ. HUS. 63/1315 Za-37.

⁸⁸ BOA, İ. HUS. 63/1315 Za-55.

the same problems were considered to be faced by the students who would graduate in the future, it was decided to form a system for appointments. Due to the fact that the students who graduated from the special class of the Mülkiye were regarded as being at the same level as *idadi* graduates with regulations made, it was decided to appoint the students who were of inappropriate age for district directorates in a suitable civil service post until their age restriction was over. It was deemed appropriate for the students who were of sufficient age for directorate to be appointed to district directorates as *idadi* graduates and after the time that they need to spend in district governorates ran out, to be appointed to district governorates at various degrees according to the of their exams. In this way, as the students who were appointed previously would be promoted, gaps were going to occur in positions and new graduates were going to be appointed to these positions as prospective *kaymakams*⁸⁹.

In later years, the School for Tribes alumni tended to go to the Military Academy rather than the Civil Service Academy. Although petitions from students sent to the Civil Service Academy were given regarding going to the Military Academy, these desires were not received favourably⁹⁰. The impact of two points on this tendency of students is possible. First of these was the employment problems of the students who graduated from the Civil Service Academy and the other was the Civil Service Academy's attitude in the face of problems regarding students coming from the School for Tribes. In a letter sent from the Civil Service Academy to the Ministry of Education in 1907, it was reported that 7-8 students were coming from the School for Tribes for 1-2 years but that year, sending only one student was notified, there was no boarder (boarding student) in the Civil Service Academy aside from students coming from the School for Tribes and having a boarding section for several students as such led to excessive costs and due to the fact that these students stay alone in the school at night, this situation would harm them. For these reasons, it was proposed that by not sending boarders to the Mülkiye, students who graduated from the School for Tribes should be accommodated in *Darıllhayr-ı Ali* ('boarding school for orphans') or Dârüşşafaka and their education should continue through their own teachers. However, this proposal was rejected due to the reason that it was against the Sultan's order⁹¹.

After graduating from the School for Tribes, the students who completed the special class of the Military Academy were appointed to various military units as military officers. Some of alumni were also given the rank of lieutenantcy and the title of honorary military assistantship⁹². Some of alumni were also assigned to duties of policing and gendarmerie sergeantship⁹³.

⁸⁹ BOA, *i. DH.* 1431/1322 Za-31.

⁹⁰ BOA, *Y. MTV.* 301/74.

⁹¹ BOA, *MF MKT.* 909/29.

⁹² *Servet-i Fünun* [The Wealth of Knowledge], June 11, 1314, vol. XV, n. 380, p. 244.

⁹³ BOA, *DH. MKT.* 2861/2. For career development of some of the ones, who completed the

4. Closure of the School

The School for Tribes continued its educational activities for 15 years from 1907⁹⁴. On that year, it was decided to open an *idadi* in Besiktas on January 17, 1908 with appropriation by the School for Tribes, whose students had been sent to their hometowns⁹⁵. The School for Tribes building was also allocated to this *idadi* to be reopened. *Idadi* opened in Besiktas in 1908 as *Kabatas Idadi* ('High School')⁹⁶. After closing the School for Tribes and sending students to their hometowns, it was decided to divide the garments that were sewn for those students but were left over, among poor students in *Kabatas Idadi*⁹⁷. We could not find a direct archive record regarding the School's closure. In general, closure of the School for Tribes can be associated with its failure to carry out the project for schools for tribes. Because the School for Tribes was opened in Istanbul to train teachers and serve as a model to schools for tribes to be opened for providing commitment of Arabic tribes to the Ottoman Empire and their development. However, the School for Tribes remained the only example and schools for tribes could not be opened in regions where tribes lived⁹⁸. In addition, failing to obtain the desired efficiency from the School for Tribes can be counted among the reasons for closure. Although the School for Tribes was a school at the level of *Rüşdiye*, it could not provide this qualitatively. Therefore, the School for Tribes alumni were sent to special classes formed in the Military Academy and the Civil Service Academy to continue their education so that they could at least receive a secondary education-level diploma.

Conclusion

Designed as an exemplary school and a teacher training institute for the education of children of Arab tribes, the School for Tribes took on a different structure before it opened. First it opened its doors to the children of Kurdish Tribes, and then accepted Albanian children in the following years. The quality

special classes in the Civil Service and Military Academies, see Rogan, *Aşiret Mektebi: Abdülhamid II's School for Tribes (1892-1907)*, cit., *ibid*.

⁹⁴ BOA, DH. MKT, 2612/3.

⁹⁵ BOA, İ. HUS, 163/1326 M-35.

⁹⁶ See Demirel, *Mekteb-i İdâdî* [Idadi schools], cit., p. 23. According to Sivrikaya, the structure later used to open the Kabatas Idadi School (see İ. Sivrikaya, *Osmanlı İmparatorluğu İdaresindeki Aşiretlerin Eğitimi ve Aşiret Mektebi* [Education of tribes under the rule of Ottoman Empire and the first school for tribes], «Belgelerle Türk Tarih Dergisi», vol. 11, n. 63, 1972, pp. 17-24, in particular p. 24).

⁹⁷ BOA, MF MKT. 1112/14.

⁹⁸ See, A. Akpınar, *Osmanlı Devletinde Aşiret Mektebi* [Tribes for School in Ottoman State], cit., p. 77.

of education provided in this school never met the expectations and this forced ministry to take measures that are not stated in the school bill such as sending school alumni to special classes formed in the Military Academy and the Civil Service Academy for one year. Also, the school and boarding students' expenses damaged the government financially, since the state's economy was not in a good condition at that time. Therefore, even though the proposal was to establish this type of school in all over the Arab territories, the school established in Istanbul remained the only example.

Between the years 1892 and 1907 the School for Tribes was operated for 15 years. During its existence, the school had numerous graduates who were assigned to civilian and military positions in less demanded regions of the state.

At a time when the pace of disintegration of the Ottoman State was accelerated, Sultan Abdulhamid II tried to re-establish the Arab tribes' commitment to the State through the School for Tribes project. The importance of the project was education, which was considered to be the most important tool in the development and continuation of the State by Sultan Abdulhamid II. These aspects mark the School for Tribes as the most important experience in Turkish history of education and Turkish modernisation history.

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Le strategie educative dell'aristocrazia polacco-lituana (1720-1773). Il ruolo dei gesuiti fra ideale retorico-umanistico e pratica pedagogica

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Educational strategies of the Polish-Lithuanian aristocracy (1720-1773). The role of Jesuits between humanistic ideal and pedagogical practice

ABSTRACT: The paper analyses the role of Jesuits as teachers and institutors of the aristocracy (*magnateria*) in the Great Duchy of Lithuania over the mid-18th century. Focus is set on different educational models, such as private learning as well as attending both traditional or noblemen's colleges, through which Jesuits tried to match the expectations of their benefactors. The most important achievement of the Jesuit Fathers was to prepare young aristocrats to play leading roles within the nobility in public life.

EET/TEE KEYWORDS: Private Education; Ruling Class; Religious Organisation; Teaching Method; Poland; Lithuania; XVIII Century.

Introduzione: il contesto politico-sociale

Lo scopo del presente articolo consiste nel presentare il ruolo dei gesuiti quali educatori dei rampolli dell'alta nobiltà polacco-lituana intorno alla metà del XVIII secolo. Questo contributo intende anche portare all'attenzione degli studiosi nuovi materiali documentari, nel tentativo di condurre il dibattito intorno all'educazione impartita dai gesuiti lontano dalla polemica ottocentesca – neppure in tempi recenti del tutto sopita – intorno alla presunta influenza della Compagnia di Gesù sul declino dello Stato polacco-lituano.

Nella Confederazione polacco-lituana i gesuiti erano strettamente legati a un ristretto gruppo di famiglie, appartenenti alla cosiddetta *magnateria*. Si

trattava di un'aristocrazia informale, che, pur non differenziandosi dal punto di vista giuridico dal resto della nobiltà, traeva il proprio prestigio sociale dalla posizione patrimoniale e dagli incarichi pubblici svolti¹. Di fronte alla questione dei criteri di appartenenza allo strato magnatizio della nobiltà, gli studiosi hanno rivolto l'attenzione sia agli aspetti esteriori, sia a quelli funzionali, caratteristici della vita politica nella Confederazione. Fra i primi vanno ricordati il possesso di residenze, di una corte e di una milizia privata, nonché il mecenatismo e le fondazioni religiose². Fra i secondi, di particolare importanza erano l'affitto di beni regi (*starostwa*) e il possesso di un seggio in senato, garantito dall'esercizio della carica locale di voivoda o castellano³.

A differenza dell'aristocrazia dei Paesi europei occidentali, le stirpi magnatizie raramente disponevano di titoli aristocratici⁴ e soltanto in minima parte erano caratterizzate da istituti giuridici come il maggiorascato, che in Occidente impediva la frammentazione dei beni di famiglia assicurando il mantenimento di un'elevata posizione sociale. Conseguenza delle caratteristiche tipiche dell'alta nobiltà polacco-lituana appena ricordate erano la fluttuazione nello *status* dei singoli casati, le differenze patrimoniali fra rami diversi, nonché il ricorso a strategie matrimoniali che privilegiavano le unioni con gli esponenti di altre famiglie magnatizie rispetto a quelle straniere, allo scopo di cementare alleanze politiche e di riunire le forze delle rispettive clientele.

La scelta del periodo compreso fra gli anni Venti e Settanta del XVIII secolo permette di evidenziare i mutamenti conosciuti dalle strategie educative sull'esempio degli esponenti di due generazioni dell'alta nobiltà. Tale scelta si giustifica non soltanto alla luce del buono stato di conservazione delle fonti, ma anche del significato che lo strato magnatizio della nobiltà assunse in seguito a mutamenti politico-sociali di lungo periodo. Soprattutto nei territori orientali della Confederazione polacco-lituana appartenenti sia al Regno di Polonia, sia al Granducato di Lituania, coincidenti rispettivamente con l'attuale Ucraina occidentale e con la Bielorussia, i magnati si circondavano di una numerosa clientela, influenzando in tal modo l'andamento delle assemblee locali (*sejmiki*)

¹ Z. Góralski, *Urzędy i godności w dawnej Polsce*, Warszawa, Ludowa Spółdzielnia Wydawnicza, 1988.

² J. Urwanowicz, E. Dubas-Urwanowicz, P. Guzowski (edd.), *Władza i prestiż. Magnateria w Rzeczypospolitej w XVI-XVIII wieku*, Białystok, Wyd. Uniwersytetu, 2003; E. Dubas-Urwanowicz (ed.), *Patron i dwór: magnateria Rzeczypospolitej w XVI-XVIII wieku*, Warszawa, DiG, 2006; Ead. (ed.), *Fundator i mecenas: magnateria Rzeczypospolitej w XVI-XVIII wieku*, Białystok, Trans Humana, 2011.

³ T. Zielińska, *Magnateria polska epoki saskiej: funkcje urzędów i królewsczyzn w procesie przeobrażeń warstwy społecznej*, Wrocław, Zakład Narodowy im. Ossolińskich, 1977.

⁴ Si trattava sia di titoli stranieri, soprattutto imperiali, sia di titoli patri, riconosciuti e garantiti in forza dell'Unione di Lublino del 1569. Di questi ultimi titoli si servivano i discendenti – veri o presunti – dei principi della Rus' o dei granduchi di Lituania. Negli anni Trenta del XVII secolo il conseguimento di nuovi titoli fu bloccato e il loro uso bandito dallo spazio pubblico.

e arrivando a disporre di un notevole potere contrattuale nei confronti delle istituzioni centrali (il *sejm* e la monarchia), indebolite per effetto dei conflitti della seconda metà del XVII secolo.

Se il *terminus ad quem* è costituito da una data chiaramente rappresentativa dal punto di vista sia politico, sia culturale⁵, il *terminus a quo* merita invece una riflessione a parte: infatti, sullo sfondo della stabilizzazione della situazione politica nello Stato polacco-lituano, a partire dagli anni Venti del XVIII secolo si consolidò nel Granducato di Lituania il predominio politico di un ristretto gruppo di famiglie, fra le quali spiccavano i Radziwiłł e i Sapieha. Per questa ragione si è deciso di dedicare particolare attenzione alle principali figure dei due casati: Michał Kazimierz Radziwiłł *Rybeńko* (1702-1762), dal 1744 grand'*etmano* di Lituania e *voivoda* di Vilna⁶, e Józef Stanisław Sapieha (1708-1755), vescovo coadiutore di Vilna⁷.

In materia di educazione svolgevano un ruolo decisivo anche le nobildonne, soprattutto qualora fossero vedove o comunque dopo l'uscita di scena del marito. In questo senso possiamo ricordare figure più o meno note agli studiosi. Fra le prime, una menzione spetta a Barbara z Duninów Sanguszkowa (1718-1791), moglie maresciallo di Lituania Paweł Karol Sanguszko (1680-1750), che negli anni Cinquanta si dedicò all'educazione dei figli Józef Paulin (1740-1781) e Hieronim Janusz (1743-1813)⁸. Tra le personalità meno note, interessante è il materiale documentario relativo a Marta z Trembickich Radziwiłłowa, moglie dell'incisore di Lituania Marcin Mikołaj Radziwiłł, privato della patria potestà sulla numerosa prole a causa di una grave malattia mentale e tenuto sotto sorveglianza dai più agiati parenti di Nieśwież⁹.

⁵ Nel 1773 ebbe luogo il *sejm* che ratificò la Prima Spartizione di Polonia, avvenuta l'anno precedente. Nel medesimo anno si giunse anche allo scioglimento della Compagnia di Gesù da parte di Clemente VIII. Tale evento mutò radicalmente la posizione dei religiosi nei confronti dei loro benefattori.

⁶ Questi era padre dei gemelli Janusz Tadeusz (1734-1750) e Karol Stanisław Radziwiłł (1734-1790). Cfr. H. Dymnicka-Wołoszyńska, *Radziwiłł Michał Kazimierz zw. Rybeńko (1702-1762)*, in *Polski Słownik Biograficzny*, Warszawa-Kraków, PAN, 1987, Vol. XXX, pp. 299-306.

⁷ Questi era tutore legale dei figli del fratello Kazimierz Leon (morto nel 1738), Aleksander Michał (1730-1793) e Michał Ksawery (1735-1766). Cfr. Z. Zielińska, *Sapieha Józef Stanisław (1708-1754)*, in *Polski Słownik Biograficzny*, Warszawa-Kraków, PAN, 1994, Vol. XXXV, pp. 24-27.

⁸ Tale figura rimane a margine dei lavori dedicati alle idee della nobildonna sull'educazione. Cfr. A. Jakuboszczak, *Mysli o wychowaniu w korespondencji Barbary Sanguszkowej*, in S. Achremczyk (ed.), *Między Barokiem a Oświeceniem. Edukacja, wykształcenie, wiedza*, Olsztyn, Towarzystwo Naukowe Ośrodek Badań Naukowych im. Wojciecha Kętrzyńskiego, 2005, pp. 210-217.

⁹ H. Dymnicka-Wołoszyńska, *Radziwiłł Marcin Mikołaj (1705-1782)*, in *Polski Słownik Biograficzny*, Warszawa-Kraków, PAN, 1987, Vol. XXX, pp. 290-291.

Le fonti

Le fonti utilizzate nel presente articolo possono essere suddivise in due gruppi: corrispondenza e diari. La maggior parte della corrispondenza analizzata si trova nell'Archivio Radziwiłł presso l'Archivio Centrale dei Documenti Storici di Varsavia, nell'Archivio Sanguszko conservato alla sezione del Wawel dell'Archivio di Stato di Cracovia e nel fondo Plater dell'Archivio Storico di Stato a Vilna. Frammenti di corrispondenza si trovano anche in varie biblioteche polacche e lituane, fra le quali vale la pena di ricordare la Biblioteca Jagellonica di Cracovia e la Biblioteca dell'Accademia delle Scienze di Lituania, che conservano materiali riguardanti la famiglia Sapieha. Infine, i contatti dei laici con le autorità centrali dell'Ordine (in particolare con il Padre generale) sono documentati dalla corrispondenza conservata nei fondi *Epistolae* e *Germania* dell'Archivio Romano della Compagnia di Gesù¹⁰.

Per quanto riguarda i diari, di notevole importanza sono quelli di Michał Kazimierz Radziwiłł *Rybeńko*¹¹ e di Józef Stanisław Sapieha¹². Occorre subito precisare che queste fonti offrono il punto di vista dei genitori o di chi disponeva della tutela legale sul giovane magnate. Inoltre, i diari non contengono considerazioni intime, bensì dettagliate informazioni sul modo di passare il tempo e sugli spostamenti effettuati dall'autore e dalle persone appartenenti alla sua cerchia familiare.

Se alla luce del materiale documentario utilizzato è possibile ricostruire le idee delle famiglie intorno all'istruzione dei loro rampolli, difficilmente definibili sono le attese dei giovani nei confronti dell'educazione. Ciò dipende dal fatto che il contatto epistolare con i genitori consisteva principalmente nell'invio di auguri in occasione degli onomastici e delle festività religiose. Elementi più concreti sono rintracciabili nelle lettere indirizzate dai gesuiti ai loro rampolli, che sono comunque da valutare con cautela, inscrivendosi nella sfera dei rapporti gerarchici fra religioso e benefattore. Lo scopo principale di tale comunicazione consisteva nell'informare i genitori dei progressi e dello stato di salute dell'allievo.

Valore ausiliario hanno i documenti di provenienza ecclesiastica come le cronache dei collegi, che registravano la presenza e le prove pubbliche degli allievi più altolocati. Nella loro forma sintetica tali cronache sono conservate nel fondo *Lithuania* dell'Archivio Romano della Compagnia¹³ e soltanto in piccola parte sono state pubblicate¹⁴. In alcuni casi si sono conservate cronache

¹⁰ La ragione del significato del fondo *Germania* per le ricerche sui gesuiti della Confederazione va ricercata nell'appartenenza della provincia lituana e di quella polacca all'assistenza tedesca.

¹¹ Archiwum Głowne Akt Dawnych (AGAD), Archiwum Radziwiłłów (AR), F 6, n. II-80.

¹² Biblioteka Ordynacji Zamoyskich (BOZ), n. 941.

¹³ Archivum Romanum Societatis Jesu (ARSI), *Lithuania*, n. 48-51.

¹⁴ J. Kleijntjens (ed.), *Fontes Historiae Latviae Societatis Iesu, Latvijas vestures avoti Jezuitu ordena archivos*, 2 voll., Riga, Latvijas Vēstures Institūta Apgādiens, 1940-1941.

più dettagliate, scandite in mesi o perfino in giorni. Fra queste merita particolare attenzione il diario del collegio accademico di Vilna relativo al periodo 1752-1766¹⁵.

Per ragioni di spazio e di merito si è deciso di non prendere in considerazione i manuali e gli appunti utilizzati dagli educatori. Ciò richiederebbe un attento studio delle biblioteche magnatizie e in ogni caso poco aggiungerebbe allo studio dei singoli casi, dal momento che i materiali didattici si tramandavano di generazione in generazione. Possiamo comunque affermare che il peso degli autori gesuiti era notevole nell'ambito sia delle scuole, sia dell'educazione privata. A titolo d'esempio basti ricordare che accanto a testi tradizionali come il *De institutione grammatica libri tres* di Manuel Álvares, progressivamente adattato ad un diretto uso da parte degli allievi, fecero la loro comparsa nella prima metà del XVIII secolo nuovi manuali, come le *Institutiones poeticae* di Joseph de Jouvancy.

La storiografia

Prima di passare all'analisi delle fonti ricordate occorre considerare i risultati della storiografia di lingua polacca relativa all'educazione delle *élites*. Tale tematica è da decenni al centro dell'attenzione degli studiosi, le cui vedute hanno profondamente risentito dei cambiamenti della situazione politica e del clima culturale.

Per la generazione che visse nella Polonia spartita il problema dell'educazione degli strati sociali più elevati era legato al dibattito intorno alle cause del declino della statualità polacco-lituana¹⁶. In un'ottica positivista la valutazione del ruolo dei gesuiti e della loro influenza sulle *élites* era prevalentemente negativa.

In seguito alla ricostituzione della Polonia (1919) si manifestò la necessità di una sintesi di valori civili rivolta alla nuova generazione chiamata a vivere in un Paese indipendente e alla ricerca di una propria via verso la modernizzazione economica e sociale. In tale contesto si giunse alla rivalutazione del contributo dei gesuiti allo sviluppo della cultura della Confederazione polacco-lituana. Una pietra miliare di questo nuovo approccio è rappresentata dal lavoro di Stanisław Bednarski, dedicato alla riforma del sistema scolastico gesuita intorno alla metà del XVIII secolo¹⁷.

¹⁵ Lietuvos Valstybės Istorijos Archyvas (LVIA), F 1135, serie 20, n. 303.

¹⁶ In questo dibattito si inserivano sia gli esponenti della storiografia di matrice positivista, prevalentemente critici nei confronti dei gesuiti, sia autori d'estrazione cattolica. Fra questi ultimi merita di essere ricordato in particolare Stanisław Załęski, autore di una monumentale sintesi della storia dei Gesuiti in Polonia. Cfr. S. Załęski, *Jezuici w Polsce*, 5 voll., Kraków-Lwów, Druk. Ludowa / Druk. W.L. Anczyca, 1900-1905.

¹⁷ S. Bednarski, *Upadek i odrodzenie szkół jezuickich w Polsce. Studium z dziejów kultury i*

Gli storici del periodo socialista hanno assunto di fronte ai gesuiti una posizione duplice, riprendendo in forma sfumata i giudizi di matrice positivista. Hanno tuttavia diretto i loro strali polemici in particolare contro l'«oligarchia» dei magnati, il conservatorismo e lo sfruttamento dei ceti inferiori da parte della nobiltà.

Negli ultimi vent'anni gli studiosi hanno sottolineato le radici europee dei modelli educativi praticati nella Confederazione polacco-lituana, mostrando al tempo stesso l'adattamento al contesto sociale e istituzionale dello Stato polacco-lituano del programma retorico-umanistico di matrice rinascimentale, corretto e riformulato dai gesuiti nella *Ratio Studiorum*. Fra i lavori appartenenti a questo filone vale la pena di ricordare lo studio di Dorota Żaładz-Strzelczyk sugli ideali pedagogici del periodo anticopolacco¹⁸ e le monografie di Kazimierz Puchowski dedicate alle trasformazioni del sistema educativo gesuita, considerate alla luce delle coeve esperienze europee¹⁹. Meritano attenzione anche i lavori di Karolina Stojek-Sawicka, la quale ha indagato fra l'altro l'opera dei religiosi quali educatori nella cerchia della famiglia Radziwiłł²⁰.

Caratteri generali dell'educazione delle élites polacco-litane nel XVIII secolo

L'educazione iniziava in casa sotto la supervisione dei genitori. In questa prima fase si insegnava a leggere e scrivere ed eventualmente le basi del latino. Si avviava anche il bambino alla vita cristiana per mezzo dell'insegnamento mnemonico delle preghiere e si cercava di inculcare il rispetto e la deferenza nei confronti degli adulti. Successivamente molti giovani lasciavano la casa paterna per intraprendere la formazione retorico-umanistica nelle scuole, fra le quali i collegi gesuiti svolgevano un ruolo di primo piano.

Contestualmente alla ripresa economica, dagli anni Trenta del XVIII secolo gli Ordini religiosi iniziarono a introdurre o a dedicare maggior spazio, spesso su richiesta della nobiltà stessa, a discipline quali le lingue moderne, la storia, la geografia e, sia pur in misura minore, le scienze esatte. Il periodo di studio in collegio aveva una funzione socializzante, in quanto abituava i giovani a trattare con i coetanei e li preparava allo svolgimento della vita pubblica. A

szkolnictwa polskiego, Kraków, WAM, 2003 (1^a ed., Kraków, Wydawnictwo Ks. Jezuitów, 1933).

¹⁸ D. Żaładz-Strzelczyk, *Idealy edukacyjne doby staropolskiej: stanowe modele i potrzeby edukacyjne szesnastego i siedemnastego wieku*, Poznań, Wydawnictwo Państwowe, 1990.

¹⁹ K. Puchowski, *Edukacja historyczna w jezuickich kolegiach Rzeczypospolitej 1565-1773*, Gdańsk 1999; nonché Id., *Jezuickie kolegia szlacheckie Rzeczypospolitej obojga Narodów*, Gdańsk, Wydawnictwo Uniwersytetu Gdańskiego, 2007.

²⁰ K. Stojek-Sawicka, *Duchowni katolicy w roli prywatnych nauczycieli i wychowawców na dworze Radziwiłłów nieświeskich w XVIII w.*, «Rozprawy z Dziejów Oświaty», n. 45, 2006, pp. 209-230.

tal fine esistevano presso i collegi istituzioni quali il teatro, le congregazioni mariane²¹ e le cosiddette dietine scolastiche, sorta di dibattiti su questioni generali di pubblico interesse²². Va ricordato che la frequentazione dei collegi era in linea di principio gratuita e rivolta a tutti coloro le cui famiglie erano in grado di assicurare alla prole vitto e alloggio in città. Fra gli allievi dei collegi – detti scuole pubbliche per la ragione testé accennata – non si trovavano soltanto membri della nobiltà agiata, ma anche di quella povera ed esponenti dei ceti urbani.

Esistevano percorsi alternativi all'educazione in collegio: infatti, il giovane poteva conseguire la formazione impartita nelle scuole pubbliche anche in casa, sotto la direzione di un gesuita appositamente incaricato dal padre provinciale su richiesta della famiglia. Inoltre, in dipendenza dal luogo in cui il giovane e la sua famiglia risiedevano, l'impiego di un istitutore non escludeva la partecipazione ad alcune lezioni nel vicino collegio. La formazione retorico-umanistica si concludeva intorno al sedicesimo anno di età e costituiva la base comune sia per la media nobiltà, sia per gli esponenti delle famiglie magnatizie.

I membri degli strati più agiati della nobiltà intraprendevano a quel punto il viaggio di formazione all'estero. Tale fenomeno, ben documentato dalle fonti e conseguentemente oggetto di numerosi studi, conobbe alcune modificazioni che vale la pena di delineare sinteticamente²³. Se nel XVI secolo il *tour* europeo rappresentava l'occasione per studiare le materie retorico-umanistiche negli atenei europei occidentali, nella seconda metà del XVII e nel XVIII secolo tali discipline erano già state fatte proprie prima della partenza grazie alla fitta rete di istituzioni educative esistenti sul territorio della Confederazione polacco-lituana²⁴. Pertanto la peregrinazione europea serviva ad approfondire la conoscenza delle lingue straniere (prima di tutto del francese, ma anche del

²¹ Nell'ambito delle confraternite le cariche erano distribuite sulla base di procedure elettive. Cfr. A. Mariani, *Udział elit w bractwach jezuitów prowincji polskiej i litewskiej. Kontrola z góry czy organizacja od dołu?*, «Zapiski Historyczne», n. 57, 2012, p. 35.

²² S. Kot, *Sejmiki szkolne jako środek wychowania obywatelskiego w Polsce XVIII wieku*, «Sprawozdania z Czynności i Posiedzeń Polskiej Akademii Umiejętności», n. 26, 1921, fasc. 1, p. 6.

²³ La letteratura di lingua polacca relativa ai viaggi d'istruzione all'estero è particolarmente ricca rispetto a quella dedicata alle altre fasi del processo educativo. Cfr. M. Chachaj, *Zagraniczna edukacja Radziwiłłów od początku XVI do połowy XVII w.*, Lublin, Wydawnictwo UMC, 1995; A. Mączak, *Życie codzienne w podróżach po Europie w XVI i XVII wieku*, Warszawa, Państwowy Instytut Wydawniczy, 1980; M. Bratuń, *Ten wykwiniony, wykształcony Europejczyk. Zagraniczne studia i podróże edukacyjne Michała Jerzego Wandalina Mniszcha w latach 1762-1768*, Opole, Wydawnictwo Uniwersytetu Opolskiego, 2002.

²⁴ Anche lo studio delle materie giuridiche costituiva un motivo di soggiorno all'estero, ma interessava soprattutto i chierici secolari. A questo proposito cfr. M. Chachaj, *Promocje doktorskie biskupów, prałatów i kanoników katedralnych krakowskich na Uniwersytecie Bolońskim od schyłku XV do końca XVII wieku*, in W. Kowalski, J. Muszyńska (edd.), *Kościół katolicki w Małopolsce w średniowieczu i we wczesnym okresie nowożytnym*, Kielce, KTN / Gdańsk, Oficyna Ferberiana, 2001, pp. 439-453; Id., *Studenci z Rzeczypospolitej w murach dawnego Uniwersytetu Sieneńskiego (do 1573 roku)*, in J. Wijaczka (ed.), *Z dziejów Europy wczesnonowożytnej*, Kielce, Takt, 1997, pp. 7-21.

tedesco e dell'italiano) e ad acquisire la conoscenza del mondo e delle persone indispensabile ai membri dell'aristocrazia. I contatti e le competenze acquisite durante la permanenza all'estero si rivelavano poi utili alla carriera politica in patria, rafforzando negli esponenti dello strato magnatizio della nobiltà il senso di appartenenza all'aristocrazia occidentale. Al conseguimento degli scopi indicati servivano la permanenza in un'accademia cavalleresca come quelle di Lunéville sotto l'egida di Stanisław Leszczyński o di Legnica nella Slesia ancora asburgica, e più tardi anche la frequentazione del *Theresianum* di Vienna.

Per completezza occorre ricordare altre modalità educative come il servizio presso la corte o la cancelleria regia e la partecipazioni alle assemblee pubbliche quali le dietine, la dieta (*Sejm*) e i tribunali. Nel primo caso, per effetto dell'indebolimento dell'istituzione monarchica la corte regia perse di significato come luogo della formazione dei rampolli delle famiglie magnatizie. A loro volta le corti dei magnati, che rivaleggiavano in splendore con quella regia, divennero oggetto delle aspirazioni non soltanto della nobiltà legata per mezzo di legami clientelari con l'aristocrazia polacco-lituana, ma anche dei parenti meno abbienti.

Luogo di formazione erano anche le assemblee politiche, alle quali i giovani partecipavano dapprima in qualità di osservatori, poi quali membri attivi. In tal modo acquisivano le conoscenze pratiche in materia di diritto necessarie all'amministrazione della cosa pubblica ed iniziavano a costruire il proprio seguito fra la nobiltà, i giuristi e i praticanti del tribunale²⁵.

Va inoltre ricordato che la principale novità del panorama educativo della metà del XVIII secolo fu l'apertura dei cosiddetti collegi nobiliari da parte dei Teatini, degli Scolopi e dei gesuiti. In questi risiedevano i rampolli delle famiglie più agiate, che dietro al pagamento di una retta annuale ricevevano una formazione ampliata alle lingue moderne, alle discipline scientifiche e storico-geografiche. Si faceva carico di questo compito un corpo docente formato da religiosi distinto rispetto a quello delle scuole pubbliche, mentre insegnanti laici impartivano lezioni di scherma, equitazione e musica. Un ruolo di primo piano era svolto dal teatro e dagli esami pubblici delle discipline caratteristiche del programma di studio dei nuovi istituti (ingegneria militare, storia universale). Svolgendosi in presenza del re o dei massimi dignitari di Stato, tali prove spianavano la futura carriera politica, accrescendo di riflesso la considerazione per l'opera educativa dei religiosi.

In sintesi, riallacciandosi ad analoghi istituti europei occidentali, gli ordini religiosi attivi in Polonia nell'educazione delle *élites* laiche cercavano di coniugare i vantaggi dell'educazione privata quali la costante sorveglianza e l'approccio personalizzato all'allievo con quelli dell'educazione pubblica, il cui elemento chiave consisteva nella socializzazione del futuro ceto dirigente. Nel

²⁵ Questi ultimi costituivano la cosiddetta *palestra*, nell'ambito della quale un ruolo di primo piano era svolto dagli esponenti dei ceti urbani.

tentativo di conservare ed eventualmente di accrescere il proprio influsso sulle famiglie magnatizie, i religiosi dovettero ridurre il peso delle discipline retorico-umanistiche e sacrificare parzialmente alcuni aspetti della tradizione educativa come il carattere intercettuale delle scuole.

Per completezza occorre ricordare un altro aspetto, quello dell'apporto dei gesuiti all'istruzione delle nobildonne. L'educazione delle dame dell'aristocrazia aveva per lo più carattere privato: se le future madri, amministratrici e padrone di casa non erano chiamate a esercitare un ruolo nelle istituzioni politiche, dovevano altresì figurare degnamente accanto ai mariti nella vita sociale. In considerazione del fatto che le giovani non frequentavano le scuole gesuite, l'influsso dei padri della Compagnia doveva essere per lo più di carattere indiretto: passava per esempio attraverso la letteratura devozionale o la frequentazione dei religiosi presenti a corte. Nella cerchia dei Radziwiłł un interessante esempio è fornito da Tekla. Ragazza di notevole carattere e qualità intellettuali, capace di opporsi a vent'anni ai progetti matrimoniali del padre, iniziò la propria educazione sotto la guida della madre, per poi ricevere lezioni di latino dapprima dal vicegovernatore di Nieśwież Józef Wetzel e poi dal gesuita Mikołaj Kuczewski²⁶.

La scelta della scuola

Un primo aspetto da prendere in considerazione consiste nella scelta del luogo e dell'istituto educativo. Sulla decisione delle famiglie di inviare i figli in un collegio piuttosto che in un altro influivano in primo luogo i rapporti fra la famiglia e la casa dell'Ordine, nonché fra la stirpe magnatizia e la società locale in cui i rampolli si sarebbero dovuti inserire. I Radziwiłł, per esempio, si istruivano tradizionalmente nel collegio fondato da Mikołaj Krzysztof detto *Sierotka* nella città privata di Nieśwież, capoluogo del maggiorascato. Si può affermare che i magnati si aspettassero l'educazione dei figli da parte dei religiosi in virtù del loro ruolo di benefattori. A loro volta i Padri della Compagnia aspiravano a tale compito, che avrebbe permesso di coltivare i legami con i futuri esponenti della famiglia.

Inoltre, i rampolli delle famiglie magnatizie si formavano nei collegi situati nei centri urbani nei quali i genitori o i parenti più stretti ricoprivano alte cariche politiche. Per esempio, gli Jabłonowski mantenevano stretti contatti sin dagli anni giovanili con i gesuiti di Leopoli, capoluogo del voivodato di Rutenia

²⁶ Lettera, F.U. Radziwiłłowa a M.K. Radziwiłł, Nieśwież, 4 settembre 1742 (AGAD, AR, F 4, b. 663); lettera, M. Kuczewski a F.U. Radziwiłłowa, Nieśwież, 4 ottobre 1747 (AGAD, AR, F 5, b. 7948).

nel quale detenevano un notevole peso politico²⁷. I figli di Mikołaj Faustyn Radziwiłł si formarono in parte a Nowogródek, capoluogo del voivodato cui questi era a capo, per poi passare a Nieśwież²⁸. Significativamente, l'ingresso nelle scuole degli illustri allievi costituiva un avvenimento pubblico al quale partecipavano anche i genitori o i tutori legali, e che talora anche riportato dalle gazzette a stampa²⁹.

Il caso dei Radziwiłł permette un'ulteriore riflessione: la scelta della città ducale presentava l'indubbio vantaggio di coniugare la formazione scolastica con la vita di corte. Infatti, i giovani potevano seguire le lezioni nel collegio e al contempo partecipare alle cerimonie che si svolgevano nel castello situato a poche centinaia di metri. Vedevano anche accresciute le possibilità di conseguire gradi militari, dal momento che il padrone di casa deteneva la carica di *etmano* di Lituania.

Oltre agli aspetti sinora richiamati non vanno trascurati quelli spiccatamente economici. Benché in possesso di immense proprietà terriere, le famiglie magnatizie erano permanentemente a corto di denaro³⁰. La scelta di un istituto situato in città privata o in un centro controllato politicamente dalla famiglia assicurava ai giovani una comoda abitazione a costi contenuti per tutto il periodo dell'educazione precedente al *tour* europeo.

A livello centrale l'atteggiamento dei superiori riguardo all'accoglienza dei giovani magnati fra le mura del collegio non era sempre coerente. Tale richiesta contravveniva, infatti, alla normativa dell'Ordine e di fatto metteva a repentaglio la tranquillità del domicilio, in quanto gli illustri allievi erano solitamente accompagnati da un folto stuolo di servitori. Occorreva tuttavia tenere conto del sostegno dato dalle famiglie ai singoli collegi, soprattutto se piccoli. Esempio è in questo senso la corrispondenza fra Michelangelo Tamburino e Mikołaj Faustyn Radziwiłł: se nel 1722 rifiutava l'ammissione dei figli del magnate al collegio di Varsavia, sette anni dopo, una volta che il Radziwiłł era divenuto voivoda di Nowogródek, il generale si vedeva costretto a ospitarne la prole nel collegio della città bielorusa³¹.

Dalla direzione provinciale provenivano invece forti pressioni sulle famiglie perché l'educazione si svolgesse all'interno del collegio nonostante la vicinanza

²⁷ A. Betlej, *Sibi, Deo, Posteritati. Jabłonowscy i sztuka w XVIII wieku*, Kraków, Societas Vistulana, 2010, pp. 31, 82, 162.

²⁸ ARSI, Fondo *Lithuania*, n. 48, f. 96v.

²⁹ Nel settembre del 1737 Michał Kazimierz Radziwiłł accompagnava al collegio di Nieśwież l'orfano Leon Michał, affidato dalla madre Marianna z Siesickich alla sua tutela. Cfr. AGAD, AR, F 6, n. II – 80a, p. 883. Nel febbraio del 1758 “Kuryer Polski”, giornale edito dai gesuiti di Varsavia, informava dell'arrivo nel collegio dei nobili di Vilna dei figli di Leon Michał, anch'essi affidati all'*etmano* dopo la prematura scomparsa del padre. Cfr. «Kuryer Polski», 1758, 10.

³⁰ Ne conseguiva la consuetudine di prendere a prestito somme di denaro dalla nobiltà locale e talora dagli stessi Ordini religiosi, garantendo i creditori mediante l'ipoteca di beni di famiglia.

³¹ Lettere, M. Tamburino a Mikołaj Faustyn Radziwiłł, Roma, 18 aprile 1722; e, sempre Tamburino a Radziwiłł, Roma, 1 ottobre 1729 (ARSI, Germania, n. 117, pp. 236-237, 387).

alla residenza magnatizia. Si giustificava ciò con argomenti pedagogici, affermando che la vita di corte non favorisce la concentrazione e che le eccessive premure da parte dei genitori distraggono dallo studio. In casi estremi il provinciale arrivava a minacciare il ritiro del pedagogo gesuita se i genitori rifiutavano di adeguarsi alla richiesta³².

Rispetto a quanto sinora delineato esistono tuttavia notevoli eccezioni. Per esempio, i Sapieha, pur comparando spesso nelle cronache dei domicili di Brześć Litewski e di Grodno, inviavano i loro rampolli a Varsavia o nel prestigioso collegio di Braniewo, città della Varmia alla quale non erano legati da vincoli politici o economici³³. Le ragioni di questa scelta vanno soltanto in parte ravvisate nell'alto livello dell'educazione là impartita. Probabilmente avevano un certo peso anche i fattori politici. Infatti, durante la Grande Guerra del Nord la famiglia si pose sotto la protezione svedese nel timore di perdere il proprio potere per effetto di una guerra civile combattuta dal 1700 con altre famiglie magnatizie del Granducato di Lituania. In questo quadro, i Sapieha furono costretti a lasciare i loro possedimenti lituani e, godendo di pessima fama fra la nobiltà, scelsero di proteggere i loro rampolli istruendoli in un collegio situato al di fuori del teatro del conflitto.

Un ulteriore aspetto che conferma i legami fra famiglia magnatizia e religiosi consiste nell'affiliazione a un dato collegio del gesuita investito della funzione di maestro privato. Gli educatori attivi nella cerchia della famiglia Radziwiłł appartenevano generalmente al personale del collegio di Nieśwież, benché talora non vi risiedessero affatto³⁴. Un'analoga situazione si riscontra nel domicilio di Iłkuksza in Curlandia, il cui fondatore Jozafat Zyberk era anche proprietario della città.

La decisione in merito luogo in cui partecipare alla vita scolastica dipendeva anche dal tipo di carriera che la famiglia si aspettava dai figli. A questo proposito va rilevato che nel XVIII secolo i membri delle famiglie magnatizie

³² «Dopo averLe già chiesto oralmente di intervenire presso la moglie dello starosta di Suboczce [Emerencjana Plater – A.M.], rinnovo la mia umile richiesta per iscritto, affinché la benefattrice non trattenga più alla sua corte padre Alenkiewicz, ma che lo rimandi insieme con il signorino al convento di Iłkuksza, dove, lontano dai passatempi di corte e dagli eccessivi agi materni comuni in tutto il mondo, può progredire molto più rapidamente [nello studio]. Se la benefattrice non vorrà soddisfare la mia richiesta sarò costretto con profonde scuse a richiamare padre Alenkiewicz al collegio». Lettera, S. Żaba a L.K. Plater, Nowogródek, 4 luglio 1765 (LVIA, F 1276, serie 2, n. 110).

³³ Fra gli altri, studiò qui nel 1724-1725 Józef Stanisław Sapieha. Cfr. BOZ, n. 941, p. 24-25. A distanza di qualche anno scriveva al provinciale Franciszek Truchonowicz: «Il ricordo dell'educazione impartitami da persone dell'Ordine ha posto in me il fondamento della stima nei confronti della *Sacra Societas*, che cresce con il tempo». Lettera, J.S. Sapieha a F. Truchonowicz, 14 settembre 1746 (Biblioteka Jagiellońska – BJ, n. 5006, p. 375).

³⁴ Per esempio, Jan Poszakowski, educatore di Hieronim Florian Radziwiłł, risiedeva negli anni 1726-33 a Biała in Podlachia. Cfr. AGAD, AR, F 5, b. 12212, ff. 1-10.

sceglievano pressoché nella totalità dei casi la carriera laica³⁵. Rispetto ai due secoli precedenti erano passati i tempi in cui l'episcopato polacco si componeva di un cospicuo numero di rampolli di stirpi magnatizie.

Come educatori dei giovani che manifestavano afflitti spirituali, ai gesuiti erano preferiti altri Ordini. Fra i più considerati erano la Congregazione della Missione (Vincenziani), che disponeva di un prestigioso seminario a Varsavia, e i Teatini, i quali a Leopoli gestivano un alunnato pontificio³⁶. La ragione del successo dei due Ordini religiosi testé menzionati va altresì ricercata nella loro vicinanza alla cultura francese e italiana, allora molto popolari fra l'aristocrazia della Confederazione.

Ai mutamenti delineati si legava la generale diminuzione dell'influenza dei gesuiti sul clero secolare. Le cause di tale fenomeno vanno ricercate nel fatto che il successo della riforma cattolica rese sempre meno attuale il modello di formazione del prete tridentino preparato alle dispute con gli acattolici e favorì l'emergere di un tipo di dignitario religioso versato nelle lingue e nelle scienze moderne, indefesso organizzatore della vita civile ed economica e riformatore delle istituzioni ecclesiastiche³⁷. Tali considerazioni erano particolarmente presenti occhi dello strato magnatizio della nobiltà, che continuava sì a servirsi di preti formati secondo il modello tradizionale, ma che cionondimeno guardava con una certa diffidenza all'impegno dei gesuiti, tradizionalmente sospettati di voler trarre nelle loro file i rampolli dell'aristocrazia.

Ai fini della carriera politica laica era sufficiente la conclusione della classe di retorica. Tale obiettivo poteva essere conseguito in uno qualsiasi dei collegi della Provincia lituana. La continuazione degli studi (per esempio con la frequentazione del corso di filosofia) avveniva di rado e dipendeva in larga misura dalle qualità intellettuali del giovane e dalle ambizioni culturali dei genitori. Notevoli novità furono introdotte con il progredire della riforma scolastica, di cui i collegi nobiliari costituivano l'elemento di punta. A disposizione della nobiltà del Granducato erano due istituzioni di nuovo tipo: a Vilna e a Varsavia³⁸.

³⁵ Oltre al già ripetutamente ricordato Józef Stanisław Sapieha, un ulteriore caso di carriera spirituale è rappresentato da Ignacy Jakub Massalski, vescovo di Vilna e figlio dell'*etmano* Michał Józef. Cfr. I. Szybiak, *Ignacy Jakub Massalski*, in *Polski Słownik Biograficzny*, Warszawa-Kraków, PAN, 1975, Vol. XX, pp. 135-139.

³⁶ Presso i Vincenziani di Varsavia e i Teatini di Leopoli si formarono rispettivamente Ignacy Jakub Massalski e Michał Hieronim Radziwiłł. Quest'ultimo tuttavia rinunciò alla condizione religiosa, concluse la propria educazione privatamente a Nieśwież e compì una brillante carriera politica. Cfr. K. Lesińska, *Radziwiłł Michał Hieronim (1744-1831)*, in *Polski Słownik Biograficzny*, Warszawa-Kraków, PAN, 1987, Vol. XXX, pp. 306-309.

³⁷ Per un quadro generale su questo tema cfr. L. Piechnik, *Seminaria diecezjalne w Polsce prowadzone przez jezuitów od XVI do XVIII wieku*, Kraków, WAM, 2001.

³⁸ A Vilna il convitto per la nobiltà povera aperto nel 1737 fu gradualmente trasformato nel corso degli anni Quaranta e Cinquanta in collegio nobiliare. Tale processo si iscrive nel contesto del rinnovamento dell'Accademia di Vilna. A Varsavia il collegio nobiliare sorse nel 1752 come risposta alle analoghe istituzioni aperte da Teatini e Scolopi rispettivamente nel 1737 e nel 1740.

Nella prima città si concentrava l'*élite* lituana. La formazione nella capitale del Granducato non presentava particolari problemi logistici: infatti, i giovani restavano nelle vicinanze delle residenze magnatizie e, benché le autorità dell'Ordine caldeggiassero la permanenza nel collegio anche durante i mesi estivi, potevano trascorrere le vacanze nelle tenute di famiglia nei pressi della città³⁹.

Pur comportando spese superiori, il soggiorno a Varsavia presentava alcuni vantaggi, fra cui la vicinanza ai centri del potere politico. Tale aspetto divenne particolarmente evidente nella seconda metà degli anni Sessanta, quando il neo eletto re Stanislao Augusto, allo scopo di rafforzare il proprio prestigio personale, cominciò a frequentare assiduamente gli esami pubblici dei tre collegi nobiliari, stringendo intensi rapporti con gli allievi e i loro educatori⁴⁰. Agli occhi delle famiglie l'educazione varsaviana aveva il pregio di gettare le basi per la carriera politica all'ombra del sovrano. Non a caso, sulla scia dei cambiamenti descritti, molti giovani si trasferivano da uno dei collegi nobiliari di provincia a Varsavia. È questo fra l'altro il caso di Mikołaj, Maciej e Michał Radziwiłł, figli di Leon Michał Radziwiłł e Anna Luiza z Mycielskich⁴¹.

Più difficile è invece stabilire se la qualità dell'educazione fosse migliore nella capitale, come suggerito da alcune osservazioni contenute nella corrispondenza⁴². Sicuramente il livello educativo a Varsavia era positivamente influenzato dalla concorrenza fra tre istituti. Inoltre, è ragionevole ritenere che l'eventuale divario fra l'insegnamento nella capitale e in provincia fosse colmabile mediante l'impiego di un religioso chiamato dalla capitale come istitutore all'interno del collegio nobile (tale figura era detta direttore). È il caso di Mikołaj Kossowski, che su richiesta di Michał Kazimierz *Rybeńko* giunse a Vilna da Varsavia come precettore dei tre figliastri⁴³. Si trattava di una figura dalla solida formazione, in quanto aveva alle spalle studi in matematica e fisica a Lione e Marsiglia.

Cfr. Puchowski, *Jezuickie kolegia szlacheckie*, cit., pp. 301-303, 387-388.

³⁹ Era il caso di Mikołaj, Maciej e Michał, figli di primo letto di Anna Luiza z Mycielskich. Dal patrigno Michał Kazimierz *Rybeńko* questi ricevettero il permesso a trascorrere le vacanze estive nella tenuta Bujdziwizki e nell'inverno del 1761 tornarono a Nieśwież per il matrimonio della sorella. Lettera, Mikołaj, Michał e Maciej Radziwiłł a M.K. Radziwiłł, Vilna, 5 luglio 1760 (AGAD, AR, F 4, b. 539).

⁴⁰ Puchowski, *Jezuickie kolegia szlacheckie*, cit., p. 436.

⁴¹ Dopo la morte del padre (1751) e per effetto del matrimonio della madre con Michał Kazimierz *Rybeńko* (1754), i tre vennero a trovarsi sotto la tutela dell'etmano. Nel periodo 1758-1762 studiarono a Vilna. Alla morte dell'etmano fu assunta la decisione di mandarli a Varsavia, dove si trovavano ancora all'indomani dell'elezione di Stanislao Augusto.

⁴² Lettera, A.L. z Mycielskich Radziwiłłowa a K.S. Radziwiłł, Mir, 22 febbraio 1764 (AGAD, AR, F 4, b. 619).

⁴³ LVIA, F 1135, serie 20, n. 303, pp. 180, 181, 239.

Soprattutto nel caso di figli sottoposti a tutela legale, la scelta del luogo e della modalità di formazione doveva essere molto complessa, in quanto costituiva la sintesi delle vedute del tutore e della madre. Un ottimo esempio è fornito da una lettera di Marta z Trembickich Radziwiłłowa a Hieronim Florian Radziwiłł:

Tutti gli ordini di Sua Eccellenza sono per me legge, quindi non voglio procedere contro la Sua volontà. Tuttavia manifesto il mio desiderio: sarei lieta di mandare i miei bambini a studiare a Varsavia dal momento che così posso avere più spesso notizie della loro salute [...]. Non disprezzo l'educazione a Vilna, ma a Varsavia – a quanto ho sentito – si trae abbastanza profitto. Se a Sua Eccellenza non pare opportuno che stiano dai teatini, allora possono andare dagli scolopi. Potremo sempre toglierli da là se la scuola non ci piace. Per quanto riguarda lo studio del diritto, che continuino per ora a imparare le lingue, e in particolare il latino. Anche là avranno i *maîtres* [maestri privati di lingue straniere – A.M.]. [...]. Poi potranno andare a Vilna a studiare il diritto, essendo più saldi nell'età e nella memoria⁴⁴.

Nel frammento richiamato si manifestano sia le preoccupazioni di madre, che, risiedendo a Demenicze in Podlachia, preferiva Varsavia alla più lontana Vilna, sia le attese del tutore, di cui erano noti il carattere sospettoso e le antipatie nei confronti dei gesuiti. Quanto al programma, la nobildonna ravvisava nella conoscenza delle lingue un elemento fondamentale della formazione e propedeutico allo studio di altre discipline.

Benché originaria della media nobiltà del voivodato di Brześć Litewski e dunque rappresentante di uno strato sociale inferiore rispetto ai parenti di Nieswież, Marta non era persona incline ad arrendersi alla volontà del tutore: i figli furono effettivamente inviati a Varsavia, ma non dai teatini o dagli scolopi, bensì dai gesuiti. Vi rimasero fino a dopo la morte di Hieronim Florian (17 maggio 1760), quando la nobildonna, in considerazione degli scarsi risultati nello studio, decise di mandarli dai teatini. Presso questi rimasero soltanto nell'anno scolastico 1760-1761, al termine del quale Marta, ancora insoddisfatta, ottenne nuovamente l'ammissione dei figli presso i gesuiti grazie all'intervento del vescovo di Kiev Józef Stanisław Załuski⁴⁵.

L'istitutore gesuita

Un ruolo particolarmente importante era affidato all'istitutore gesuita, sia che svolgesse le sue mansioni come insegnante privato, sia come direttore nell'ambito del collegio nobiliare. In entrambi i casi era designato dal provinciale

⁴⁴ Lettera, M. z Trembickich Radziwiłłowa a H.F. Radziwiłł, Iwań, 28 agosto 1757 (AGAD, AR, F 4, b. 708).

⁴⁵ Lettera, M. z Trembickich Radziwiłłowa a J.S. Załuski, 30 agosto 1761 (Biblioteka Narodowa – Warszawa, n. III-3261, c. 20).

su richiesta della famiglia. Va sottolineato che le qualità morali e di condotta ricercate dai genitori o dai tutori negli insegnanti rendevano i gesuiti candidati ideali a questa funzione⁴⁶.

Attraverso la corrispondenza con i magnati i religiosi si dipingevano quali fedeli servitori della famiglia, prendendo le distanze dalle preoccupazioni mondane degli educatori laici:

La mia unica preoccupazione è che [il principe] non è ancora in grado di sostenere un esame pubblico, dal quale altri educatori traggono consolazione mostrando a tutti la bancarella del loro sapere *pour l'apparence* [in francese nel testo – A.M.]. Il nostro tesoro è nascosto, ma è probabilmente più grande: Dio così dispone di me poiché sono incline alla vanagloria. Ma di ciò non temo: io scolpisco nella roccia. Non come gli altri Mercurio che intagliano nel legno. Fanno prima loro, ma vediamo poi che cosa rimane⁴⁷.

Il gesuita impegnato nell'educazione del giovane magnate costituiva inoltre l'anello di congiunzione fra collegio e famiglia. La delicata mansione di insegnante domestico era affidata a religiosi che, avendo celebrato i voti superiori, disponevano di una pluriennale esperienza di insegnamento nelle scuole pubbliche. Più giovani erano i direttori nei collegi nobiliari, contestualmente con l'età media del personale docente dei nuovi istituti, più bassa rispetto alle scuole tradizionali.

Ai religiosi la vita a corte offriva la possibilità di conoscere discipline che esulavano dal programma di studio dei collegi gesuiti. A tale scopo servivano le biblioteche private, ben fornite di opere d'autori stranieri. Inoltre, a corte avevano modo di perfezionare la conoscenza delle lingue moderne, grazie alla presenza di funzionari provenienti dai Paesi dell'Europa occidentale, nonché di acquisire esperienza nei contatti con persone di differente condizione sociale e d'altro credo religioso. Un ulteriore aspetto della formazione dei religiosi nella cerchia dei magnati è rappresentato dal fatto che talora, godendo della particolare fiducia dei magnati, i gesuiti accompagnavano i figli dei loro benefattori nel viaggio d'istruzione nei Paesi dell'Europa occidentale.

A ben vedere, l'educazione del giovane non era unicamente frutto dell'opera del gesuita, ma del concorso di più persone, fra le quali si annoverano sia laici, sia ecclesiastici. Ai gesuiti spettava il compito di padri spirituali, nonché di insegnanti delle discipline umanistiche e talora delle lingue straniere. Le lezioni delle restanti materie (scherma, equitazione, matematica) erano impartite da laici, spesso facenti già parte della corte magnatizia. Se ai gesuiti spettava un

⁴⁶ Józef Stanisław Sapięha scriveva: «Un grand fond de religion et de probité et des meures irréprochables surtout en chasteté après cela la qualité dominante que je désire dans un homme comme cela c'est beaucoup de prudence, de circonspection et de vigilance». Lettera, J.S. Sapięha a P. Sliwicki OCM, s.l e s.d. (BJ, n. 5006, p. 254).

⁴⁷ Lettera, W. Zadarnowski a B. Sanguszkowa, Lubartów, 10 maggio 1749 (Archiwum Państwowe w Krakowie – Oddział na Wawelu – APKW, Archiwum Sanguszków – ASang, b. 232/5).

ruolo di primo piano nell'organizzazione e nella gestione del tempo dei loro allievi, le funzioni di rappresentanza erano di norma affidate al cosiddetto maresciallo di corte, un nobile laico o un prete diocesano il cui peso aumentava contestualmente alla crescente autonomia dei giovani magnati rispetto all'*entourage* dei genitori.

Indicativo è il caso della famiglia Radziwiłł: i figli dell'*etmano* iniziarono ad avere la propria corte all'età di otto anni, quando si trasferirono dal castello di Nieśwież al palazzo urbano dei Radziwiłł per ricevere l'educazione nell'antistante collegio gesuita. Nella loro cerchia comparivano un prete laico d'origine francese Antoine Ronchberg quale maresciallo e il gesuita Mikolaj Kuczewski con la funzione di insegnante⁴⁸. Significativamente, i giovani dei rami meno abbienti della famiglia che comparivano a Nieśwież non disponevano invece di una propria corte, ma risiedevano al castello, dividendo la loro esistenza fra la corte della moglie dell'*etmano* e le scuole pubbliche.

Decisiva era la lealtà dei religiosi nei confronti del benefattore. Il mancato adeguamento alle attese dei genitori provocava l'immediato allontanamento dalla corte, mentre lo svolgimento della propria funzione con esito positivo favoriva la carriera. Talvolta le famiglie esercitavano dirette pressioni sul provinciale affinché designasse un gesuita che in passato era stato istitutore dei propri figli alla direzione del collegio protetto dalla famiglia. È il caso di Józef Powilewicz, istitutore dei figli di Jozafat Zyberk nel periodo 1750-1758. Nel 1761, in seguito alla trasformazione del domicilio di Iłkuksza da residenza a collegio, questi ritornò nella città privata in qualità di rettore, lasciando in tutta fretta Vilna, dove temporaneamente insegnava filosofia, prima della fine dell'anno scolastico⁴⁹.

Non necessariamente la carriera dei religiosi si svolgeva all'ombra delle famiglie dei loro allievi. La protezione dei magnati favoriva talora la carriera alla corte regale. È il caso di Ludwik Bömfeldt, gesuita originario della Prussia Reale, che, dopo aver svolto la funzione di educatore di Aleksander Michał Sapieha, allora affidato alla tutela dello zio Józef Stanisław, fu raccomandato da quest'ultimo a Ludwik Ligeritz, cappellano di Augusto III⁵⁰. Per effetto di questa raccomandazione il religioso fu chiamato a Dresda come missionario⁵¹. Vale la

⁴⁸ Dopo essersi occupato dell'educazione dei figli dell'*etmano* Michał Kazimierz Radziwiłł, Mikolaj Kuczewski divenne confessore e cappellano di corte del magnate, al fianco del quale svolse la funzione informale di consigliere fino alla morte di questi nel 1762. In seguito fece parte del personale di corte del figlio di questi e suo ex-allievo Karol Stanisław *Panie Kochanku* per poi passare, in seguito all'esilio del benefattore, alla direzione del collegio di Słuck, città privata della famiglia Radziwiłł. Cfr. L. Grzebień (ed.), *Encyklopedia wiedzy o jezuitach na ziemiach Polski i Litwy*, Kraków, WAM, 1996, p. 341.

⁴⁹ Kleijntjens (ed.), *Fontes*, cit., Vol. II, p. 182.

⁵⁰ BOZ, n. 941, p. 428.

⁵¹ Grzebień (ed.), *Encyklopedia wiedzy*, cit., p. 57. Dopo la partenza di Bömfeldt il prelado ne inteseva le lodi nella già citata lettera al provinciale di Lituania Franciszek Truchonowicz del 14 novembre 1746. Cfr. BJ, n. 5006, pp. 374-375.

pena di rilevare che i contatti con la famiglia dell'allievo persistevano nonostante la distanza geografica e il passare tempo: il gesuita, infatti, caldeggiava presso il sovrano il conferimento di benefici ecclesiastici sotto il patronato regio a protetti dei Sapieha⁵². Un brillante esempio in questo senso è offerto anche da Wawrzyniec Zadarnowski, educatore dei figli di Barbara Sanguszkowa. Negli anni Sessanta manteneva stretti contatti con la nobildonna, inviando auguri e reliquie da Roma, dove si trovava in qualità di segretario dell'assistente di Polonia Tomasz Dunin⁵³.

L'allontanamento degli educatori non era cosa rara. Soprattutto quando i genitori risiedevano lontano dai figli e dai loro educatori, le possibilità dei giovani nel manipolare la famiglia erano abbastanza ampie. Talvolta bastava la generica accusa di ottusità e di trascuratezza⁵⁴. Alla decisione dei magnati i gesuiti si adeguavano con la consueta deferenza, limitandosi a rilevare l'infondatezza dei rimproveri loro indirizzati, risultato dell'invidia e dell'ostilità di anonimi personaggi a corte⁵⁵.

In alcuni casi sulla decisione di allontanare un pedagogo influiva la lotta fra due famiglie per la tutela legale di un minorenne. Tali conflitti, non infrequenti data la piuttosto breve durata media delle unioni matrimoniali, vanno osservati sullo sfondo degli interessi economici, in quanto in gioco non soltanto era l'educazione dell'orfano, ma soprattutto l'amministrazione del patrimonio. A tal proposito possiamo richiamare la figura di Aleksander Sapieha. Dopo la morte del padre Kazimierz Leon (20 maggio 1738) divampò lo scontro fra la moglie di questi Karolina z Radziwiłłów, che nel 1740 si risposò con Józef Aleksander Jabłonowski, e i fratelli del defunto Józef Stanisław e Michał Antoni Sapieha. In un primo momento prevalse la nuova coppia, che ottenne l'allontanamento del gesuita Franciszek Judz, già cappellano di Kazimierz Leon Sapieha e temporaneamente investito della funzione di educatore della prole⁵⁶. In un secondo tempo, grazie alla mediazione di Michał Kazimierz Rybeńko, fratello di Karolina, si giunse a un accordo in base al quale il patrimonio fu diviso e l'educazione del giovane affidata allo zio paterno.

È legittimo domandarsi se i gesuiti percepissero uno stipendio in virtù dei loro servizi quali insegnanti. Nelle lettere indirizzate dagli istitutori ai magnati compaiono raramente accenni a paghe arretrate. Ciò non autorizza tuttavia a escludere che la mercede fosse concordata privatamente fra nobile e religioso. Va ricordato che la normativa dell'Ordine vietava di ricevere denaro in cambio dell'educazione e prescriveva l'affidamento al superiore locale del denaro eventualmente ricevuto a titolo di offerta. È comunque probabile che

⁵² Mokslų Akademijos Biblioteka (MAB), F 139, b. 148.

⁵³ APKW, ASang, b. 232/5.

⁵⁴ AGAD, AR, F 6, n. II – 80a, p. 6.

⁵⁵ Lettera, K. Kamiński a K.S. Radziwiłł, Biała, 10 luglio 1717 (AGAD, AR, F 5, b. 6374).

⁵⁶ BOZ, n. 941, p. 349; lettera, F. Judz a J.S. Sapieha, Kock, 24 marzo 1741 (MAB, F 139, b. 5340).

i magnati destinassero ai loro cappellani prestazioni materiali di vario tipo, che andavano dall'assicurazione di vitto e alloggio a corte alle elemosine, alla donazione di libri e strumenti liturgici. Il pagamento in cambio dei servizi in ambito educativo era istituzionalizzato nei collegi nobiliari. Anche in questo caso la pratica si discostava talora considerevolmente dalla norma: infatti, capitava che le famiglie pagassero in ritardo e che i gesuiti si indebitassero al fine di assicurare ai propri allievi ogni comodità e un tenore di vita degno del loro *status*.

Programma e modalità educative

Compito fondamentale degli educatori gesuiti era l'avvio a una vita sacramentale regolata e conforme alle norme tridentine. Genitori e tutori invitavano tuttavia alla moderazione nella devozione religiosa, consigliando in particolare di non imporre la pratica settimanale dei sacramenti, piuttosto comune nelle scuole gesuite⁵⁷.

Fra i primi compiti di fronte ai quali il gesuita si trovava nel momento in cui iniziava a occuparsi dell'educazione del giovane magnate vi era quello di consolidarne le capacità di lettura e scrittura. Nel caso di Janusz Tadeusz e Karol Stanisław Radziwiłł, lo studio dell'alfabeto iniziò nel 1738 a quattro anni d'età, mentre i gemelli si trovavano ancora sotto la sorveglianza della madre. Il metodo impiegato non soddisfaceva Michał Kazimierz, che in breve ordinò la sospensione delle lezioni. Non avendo accesso ai libri, i gemelli dimenticarono le basi ricevute⁵⁸. Soltanto nel 1742, nel momento in cui comparve Kuczewski a corte, furono riprese le lezioni, questa volta direttamente sulla base della grammatica di Álvares⁵⁹.

Nelle discipline retorico-umanistiche si cercava di limitare lo studio mnemonico e alla teoria contenuta nel manuale di Álvares si prediligeva gli esercizi pratici di traduzione⁶⁰. Le competenze acquisite erano mostrate ai

⁵⁷ «Gli leggevano ogni giorno una meditazione, mentre la domenica e i dì di festa assisteva alla predica. Si consigliava di accostarsi ai sacramenti almeno due volte al mese, ma senza obbligo, in considerazione del fatto che esso per giovani risulta spesso pericoloso». Cit. in BOZ, n. 941, p. 428.

⁵⁸ Lettera, F.U. Radziwiłłowa do A.K. z Sanguszków Radziwiłłowa, Nieśwież, 4 novembre 1742 (AGAD, AR, F 4, b. 663).

⁵⁹ «Il professore gesuita affiancato loro in special modo li tiene d'occhio quotidianamente, ma il metodo di leggere e non di sillabare non piace a nessuno. Benché siano capaci di leggere e di scrivere non hanno imparato a comporre le parole, né sanno l'alfabeto. Soltanto ora imparano a sillabare e a leggere con l'Álvares». Lettera, F.U. Radziwiłłowa a M.K. Radziwiłł, Nieśwież, 4 gennaio 1743 (AGAD, AR, F 4, b. 663).

⁶⁰ A un anno dall'inizio delle scuole Kuczewski informava il suo benefattore che i figli sapevano già le quattro coniugazioni (sic!) e traducevano brevi testi dal polacco al latino. Cfr. lettera, M.

genitori mediante discorsi d'occasione e lettere redatte sotto la supervisione del pedagogo gesuita e sull'esempio dei migliori brani degli autori classici⁶¹. Non era facile tuttavia accontentare i genitori, che talora lamentavano di ravvisare nelle lettere dei figli l'ingerenza degli educatori.

Con il progredire della conoscenza del latino si passava gradualmente all'insegnamento delle lingue moderne, fra le quali spiccava il francese. In questo senso difficoltà si manifestavano nel trovare insegnanti adeguatamente preparati a un prezzo ragionevole. Spesso si ricorreva a stranieri presenti a corte o nel luogo in cui i giovani magnati risiedevano per ragioni educative. Si trattava nella maggior parte dei casi di insegnanti non qualificati, ufficiali o segretari che, con l'appoggio dei magnati, coniugavano la didattica con altre attività come quella editoriale o di scrittori⁶². Raramente i gesuiti polacchi erano in grado di farsi carico del compito di insegnare il francese. Fra i casi studiati, soltanto Mikołaj Kuczewski si serviva attivamente di questa lingua nella corrispondenza con i benefattori.

A conferma di quanto sinora affermato merita una breve considerazione il caso dei Sanguszko: nel 1753 Barbara, inviando i figli a Varsavia insieme con l'istitutore gesuita, chiedeva consiglio a Konstancja z Czartoryskich Poniatowska, madre del futuro re Stanislao Augusto:

Per quanto riguarda il *maître*, mi dice che non ne conosce a Varsavia, benché ci consigli di prendere quello che insegna al collegio degli Scolopi. Dice anche che è una perdita di denaro pagare per sedici ore al mese due *złoty* rossi all'ora [...], che una lezione non segue l'altra e che per i bambini è difficile sopportare tutti quei maestri privati. Consiglia invece di impiegare un uomo che sia meno di un *maître*, che abiti da noi alla stregua un servitore (*kamerdyner*) e che, essendo sempre a fianco dei principi, parli loro in francese. Dice che così tutti i suoi figli hanno imparato un po' alla volta senza accorgersene [*insensiblement* – in francese nel testo polacco – A.M.]. Un uomo del genere si troverà qui facilmente. [...] Può abitare nella stanza dove dorme anche Jurewicz e i due avranno abbastanza di quello che avanza dalla tavola [dei principi]. Quest'idea mi è sempre piaciuta [...]: infatti, anche io confondo le regole e la pronuncia del francese con il latino. Quello mi sarà d'aiuto nella conversazione, in quanto sarà sempre presente a lezione⁶³.

Kuczewski a M.K. Radziwiłł, Nieśwież, 3 luglio 1743 (AGAD, AR, F 5, b. 7948).

⁶¹ Così Józef Stanisław Sapiaha tratteggiava il metodo prescritto a Bömfeldt: «Gli ho ordinato di non far studiare a memoria l'Álvares, ma di spiegare soltanto la regola e di farla ripetere alcune volte all'anno, di assegnare componimenti conformemente a quelle e di far tradurre dal polacco al latino e viceversa. [Inoltre ho prescritto] di spiegare l'artificio poetico di ogni autore e di far leggere e tradurre i migliori brani dei classici. Così ha insegnato la retorica per due anni, con la differenza che ha fatto esercitare parecchio nella composizione di orazioni e lettere in latino e in polacco. Delle cose che imparava [Aleksander Michał] discuteva con me almeno una volta al giorno, poiché ciò introduce al timor di Dio e ai buoni costumi». Cit. in BOZ, n. 941, pp. 427-428.

⁶² Fra questi possiamo ricordare Lorentz Mitzler von Kolof e César Pyrrhus de Varille. Cfr. Puchowski, *Jezuickie kolegia szlacheckie*, cit., p. 184.

⁶³ Lettera, W. Zadarnowski a B. Sanguszkowej, Varsavia, 8 novembre 1753 (APKW, ASang, b. 232/5).

Lo studio era inframmezzato da numerosi passatempi, fra cui visite ai santuari, alla nobiltà del vicinato e festeggiamenti legati agli onomastici. Si cercava invece di limitare attività potenzialmente più pericolose, come il tiro a segno con armi da fuoco e le cavalcate, ammesse soltanto a partire dal dodicesimo anno di età.

Come già accennato, i gesuiti svolgevano un ruolo di primo piano nella socializzazione della nobiltà. Nel caso dei rampolli di famiglie magnatizie, con questo termine si deve intendere la preparazione ad assumere la guida della nobiltà nell'ambito delle assemblee pubbliche. Tale ruolo era indissolubilmente legato alla capacità di convincere l'interlocutore, ma soprattutto alla consapevolezza della propria posizione sociale. A questo scopo si mettevano in atto molteplici strategie sin dal periodo dell'educazione scolastica. Oggetto di valutazione positiva da parte dei genitori erano le *dietine* scolastiche, alle quali per esempio partecipavano Janusz Tadeusz e Karol Stanisław Radziwiłł, dapprima in qualità di osservatori, poi assumendone la direzione⁶⁴. Ad abituare a parlare in pubblico servivano anche le cerimonie scolastiche, che talora si svolgevano in presenza dei parenti. Per esempio, terminata la classe di retorica, Leon e Stanisław Radziwiłł tennero un discorso a margine della rappresentazione teatrale messa in scena degli allievi del collegio a conclusione dell'anno scolastico 1737-1738⁶⁵.

L'impegno educativo dei gesuiti proseguiva talora nella vita politica reale. Kuczewski per esempio avrebbe dovuto preparare il discorso dei figli dell'*etmano* in occasione della Dieta, poi non svoltasi, del 1743⁶⁶. Completata ormai la propria missione educativa, il gesuita seguiva da vicino i gemelli in occasione del tribunale di Vilna del 1750, al quale i due sedicenni prendevano parte in qualità di deputati, informando l'*etmano* del comportamento dei giovani.

Disciplina e vita quotidiana

Nelle lettere dei gesuiti sono espresse le difficoltà incontrate nello svolgimento del proprio compito. Va preliminarmente rilevato che la posizione sociale

⁶⁴ Lettera, F.U. Radziwiłłowa a M.K. Radziwiłł, Nieśwież, 6 dicembre 1742 (AGAD, AR, F 4, b. 663). In quest'ultima occasione Michał Kazimierz Rybeńko, presente alla *dietina*, esprimeva la propria soddisfazione: «Dopo pranzo sono stato dai miei figli, presso i quali [si tratta probabilmente del palazzo urbano dei Radziwiłł – A.M.] le scuole svolgevano i loro *sejmiki*. È una cosa utile per i ragazzi, affinché parlino con facilità e prontezza. Mio figlio Janusz ha assunto la funzione di direttore». Cit. in AGAD, AR, F 6, n. II – 80a, pp. 1353-54.

⁶⁵ AGAD, AR, F 6, n. II – 80a, p. 927.

⁶⁶ «L'harangue, que nos jeunes Princes devront dire en plein parlement de notre royaume, n'est pas encore composée par moi, comme Votre Altesse ordonna, a cause, qu'il me faut avoir une meilleure information de Votre Altesse sur cet ouvrage d'esprit». Lettera, M. Kuczewski a M.K. Radziwiłł, Nieśwież, 3 luglio 1743 (AGAD, AR, F 5, b. 7948).

superiore del giovane magnate rispetto all'istitutore e la costante presenza del gesuita nella cerchia di quello indebolivano la percezione psicologica della distanza fra educatore e allievo necessaria al mantenimento della disciplina. Mal sopportati dagli allievi erano talora anche i maestri laici che si alternavano nella conduzione delle lezioni nelle discipline necessarie al giovane aristocratico⁶⁷. In quest'ottica, non stupisce che sulle questioni disciplinari fosse necessario l'intervento dei genitori o dei tutori legali. Tale fenomeno trova un puntuale riflesso nella corrispondenza.

Talora, di fronte all'aperta insubordinazione degli allievi, i gesuiti esprimevano amarezza e scoramento. Per esempio, Mikołaj Kuczewski si sfogava con Giovanni Maria Lascaris, prelado vicino alla famiglia Radziwiłł, dipingendo i figli dell'*etmano* come «sempre più malevoli, disobbedienti e libertini»⁶⁸. A conclusione della lettera il gesuita ammetteva la propria incapacità di venire a capo della situazione, suggerendo all'interlocutore di convincere l'*etmano* a prendere con sé i figli, o di mandarli in una delle principali città del regno ad apprendere le materie di Stato. Questa strategia fu presto messa in atto dal magnate, che aspirava a introdurre il prima possibile i figli nella vita politica attiva. Le attese del gesuita rispetto al miglioramento della condotta dei gemelli si rivelarono tuttavia vane. Infatti, giunti a Łuck mentre si svolgeva la locale dietina, i due conquistarono enorme popolarità fra la nobiltà offrendo pranzi e cene, benché ciò si ripercuotesse negativamente sull'efficienza dell'assemblea⁶⁹.

La reazione dei genitori alle marachelle dei figli era generalmente moderata. Benché il modello educativo assegnasse una posizione radicalmente diversa a educatori e allievi, più che sulle percose o sulle misure coercitive si faceva

⁶⁷ «Ogni giorno è pesante. Pensa sempre a qualcosa, inizia una parola e non la finisce, soprattutto in francese: appena comincia la lezione si entusiasma di qualcosa derivante dalla vivacità d'ingegno, che è di solito impaziente nel lavoro. A mio parere è essenziale che abbia qualcuno con cui parlare, e non sempre con il *maitre*, poiché ciò non gli piace e per questo si comporta in modo infantile». Lettera, W. Zadarnowski a B. Sanguszkowa, Lubartów, 10 maggio 1749 (APKW, ASang, b. 232/5).

⁶⁸ «Leur air impérieux et dédaigneuse se fait sentir par tout et en tout, les emportements de leur colère remplissent d'amertume tous les domestiques. Pour surcroit de malheur on nous a fait entendre, que les princes passeront l'été sous des tentes qui sont déjà alacées près de l'étable à vaches d'Hollande. Imaginez-Vous Monsieur, quels seront leurs études au milieu de tant d'obstacles. Mais je crains encore plus pour leur innocence, qu'Elle n'y soit flétrie parmi la foule du sexe, qui y sera en grand nombre». Lettera, M. Kuczewski a G.M. Lascaris, Nieśwież, 8 giugno 1747 (AGAD, AR, F 5, b. 7948).

⁶⁹ «Cependant toute la noblesse, sans excepter les plus distingués, se louent hautement de la profusion, avec la quelle Les Altesses Sérénissimes les traitent tous les jours à diner et à souper, si bien que Monsieur Olszański, chambellan de Łuck, et les autres officiers du palatinat se sont mis aujourd'hui à insinuer a Leurs Altesses de faire quelque suspension des traitements de cette nature, a fin que la noblesse remise, ma ce moïn, en possession du bon sens, qui se trouve a présent abimé dans le vin, fut en état de vaquer a l'arrangement des affaires». Lettera, M. Kuczewski a M.K. Radziwiłł, Łuck, 29 settembre 1750 (AGAD, AR, F 5, b. 7948).

leva sull'orgoglio personale e sul senso d'appartenenza allo strato superiore della nobiltà, il cui comportamento doveva essere esemplare. Tale concezione è brillantemente sintetizzata in una lettera di Michał Kazimierz Radziwiłł ai figli:

Sforzatevi, poiché vedo nelle vostre lettere che scrivete come per costrizione, *non tam libenter, quam reverenter* [in latino nel testo – A.M.]. Scrivendo qualcosa a vostro padre correttamente, e non con errori, immaginate se è degno d'essere scritto al re. Dovete sapere che il padre è per i figli come un re [...]. Da ciò risulta che lo studio della lingua è trascurato. Vi scrivo come un padre ai figli: correggetevi perché non mi debba vergognare di voi⁷⁰.

Le istruzioni dei genitori agli educatori contemplavano una serie di punizioni fisicamente non nocive come lo stare inginocchiati, il divieto di svolgere la ricreazione, la privazione del vino o della pietanza preferita⁷¹. Misure coercitive come le percosse o l'arresto erano più spesso minacciate che effettivamente assunte⁷². Si può supporre che esse fossero inflitte da laici quali i militari presenti a corte, piuttosto che dai gesuiti in persona. Occorre sottolineare che fra l'ampio materiale studiato soltanto in un caso si sono trovati accenni a pene fisiche⁷³. Furono inflitte a un esponente della famiglia Radziwiłł sottoposto a tutela legale, l'educazione del quale ebbe per molti aspetti un corso piuttosto singolare sullo sfondo della pratica del tempo⁷⁴.

In rari casi si cercava di instaurare con i giovani un rapporto basato sull'ascolto e sulla reciproca fiducia. Un ottimo esempio è fornito da Józef Stanisław Sapieha nei riguardi del nipote Aleksander Michał. Il programma formulato dal coadiutore di Vilna nel suo diario non si limitava a contemplare l'onesta amministrazione dei beni, ma presentava anche l'ideale di rapporto con il giovane al momento di affidarlo al gesuita Ludwik Bömfeldt:

Ho deciso di sforzarmi affinché faccia tutto volontariamente e senza costrizione, servendomi degli argomenti che possono presentare la Fede, la coscienza, l'onore, la stima della gente e

⁷⁰ Lettera, M.K. Radziwiłł a K.S. e J.T. Radziwiłł, Ołyka, 16 giugno 1747 (AGAD, AR, F 4, b. 433).

⁷¹ AGAD, AR, F 11, n. 164, c. 1.

⁷² «Karol! Mi stupisce che non dai ascolto a tua madre. Alzati e vai a scuola, perché vengo al palazzo e se non ti trovo a scuola ti do cento vergate! Basta con queste scuse. Preferisco che tu sia malato piuttosto che buffone, quindi ti ordino di andare a scuola, anche se mezzo morto. [...] Se non ci vai, ti mettono subito in stato di arresto. Ne ha facoltà il colonnello». Lettera, F.U. Radziwiłłowa a K.S. Radziwiłł, Nieśwież, s.d., n. 936 (AGAD, AR, F 4, b. 664).

⁷³ Lettere, O. Korytyński a H.F. Radziwiłł, Słuck, 3 maggio e 2 giugno 1757 (AGAD, AR, F 5, b. 7346).

⁷⁴ Józef Mikołaj, figlio di primo letto dell'incisore di Lituania Marcin Mikołaj, iniziò la propria formazione più che dodicenne, dopo l'affidamento ai parenti di Nieśwież. Tenuto sotto stretta sorveglianza per volontà di Hieronim Florian Radziwiłł, si formò a Słuck dapprima sotto la direzione del gesuita Ignacy Petrycy e poi dello scolopio Maciej Tukałło. Le lezioni si svolgevano in comune con i figli di ufficiali della milizia privata. Il magnate teneva il giovane lontano da sé nonostante le richieste degli educatori, e soprattutto non si dimostrava interessato al suo ingresso in politica. Lettera, M. Tukałło a H.F. Radziwiłł, Słuck, 1 novembre 1756 (AGAD, AR, F 5, b. 16550).

l'affetto nei miei confronti. [Ho deciso] di comportarmi con lui diplomaticamente, non come con uno che si trovi sotto la mia tutela, ma come con un amico, in modo da conquistarne la fiducia; di conversare con lui più spesso e di indirizzare quei discorsi alla formazione dei sentimenti che si addicono al cristiano, alla persona onesta e di nascita illustre. [Ho anche scelto di] assicurargli ogni comodità e di non vietargli i divertimenti onesti, in modo da tenerlo lontano da quelli vietati. Questo modo d'educare non è ben visto in Lituania, dove tutte le questioni sono trattate con la gioventù per mezzo della costrizione e delle percosse⁷⁵.

Le ragioni dell'illuminato approccio del prelato vanno ricercate nel fatto che il conflitto fra i Sapieha e la madre del giovane rendeva necessario evitare situazioni che potessero esacerbare i rapporti fra Aleksander Michał e lo zio.

Conclusion

Gli anni giovanili erano fondamentali per la formazione dell'identità dell'aristocrazia polacco-lituana. L'educazione impartita dai religiosi può essere letta come socializzazione, in quanto si esplicava nella creazione di contatti con la nobiltà, rispetto alla quale il giovane magnate avrebbe dovuto assumere – nella vita politica reale – il ruolo di guida e patrono. Il *tour* europeo aveva valore complementare, giacché rafforzava nel magnate la percezione dell'appartenenza all'aristocrazia europea occidentale e permetteva di approfondire la conoscenza delle lingue straniere utili alla carriera politica.

Nel periodo preso in esame l'apporto dei gesuiti all'educazione degli esponenti dello strato più elevato della nobiltà rimase evidente e costante. L'influenza sui giovani era particolarmente forte nel periodo dell'adolescenza che precedeva il viaggio europeo e l'inizio della vita politica attiva. Anzitutto i gesuiti erano partecipi del processo educativo che iniziava fra le mura domestiche in quanto padri spirituali e precettori. Inoltre, nelle scuole pubbliche i membri delle famiglie magnatizie frequentavano generalmente i corsi per la durata di un anno scolastico, al termine del quale prendevano parte all'esame pubblico della classe di retorica. Contestualmente al rinnovamento del sistema scolastico gesuita, l'invio dei giovani magnati nei collegi nobiliari prolungava la permanenza fuori casa, accrescendo ulteriormente l'influsso dei Padri della Compagnia sulla futura *élite*.

Nello svolgere il loro compito di educatori secondo le tre modalità indicate, i gesuiti non erano del tutto autonomi, bensì si adattavano alle richieste e alle attese dei genitori dei loro allievi, che al contempo erano anche benefattori della Compagnia nel suo complesso. I modelli e le scelte educative risentivano della situazione e dei rapporti all'interno della famiglia d'origine degli allievi, nonché delle strategie politiche da questa perseguite. Di tutto ciò i gesuiti dovevano

⁷⁵ BOZ, n. 941, pp. 360-361.

necessariamente tenere conto al fine non soltanto di preservare il proprio ruolo, ma anche eventualmente di accrescere la propria influenza sull'élite politico sociale della Confederazione polacco-lituana.

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Finding out about the colonies. The role of schools, between the 1800s and 1900s, in establishing an Italian colonial identity. The state of research

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ABSTRACT: Even lacking – if compared with other European countries – any tradition and policy of colonial expansion, nevertheless fascist Italy had her own, brief but violent, ‘colonialist season’ that played an important role not only on a cultural level but also influenced domestic policies. This was especially the case when it came to the complex task of creating a national identity and when nationalising the masses, all of which took place between the end of the 19th and the first half of the 20th centuries, and which also saw the involvement of the military forces and education system. The essay provides an attentive and reasoned overview the state of the historiographical research on a wider context and then focuses on the characteristics of the Italian colonisation policy, which was committed to establishing on the notion of subjection/subordination of ‘the others’ – strongly promoted through the political propaganda and school instruction as well – a powerful image of the nation: an issue that was particularly crucial for a newly-founded country like Italy.

EET/TEE KEYWORDS: Colonialism; Education System; Nationalization; Race Relations; Perception of Others; Cultural Identity; Italy; Africa; XX Century.

1. *Italian colonialism*

The expansion of Italian colonialism (the Italian Empire), as compared with such countries as Great Britain and France, developed over a relatively brief period of time and over a restricted territory. As a result of a belated national unification and the initial decision, by the ruling classes of the time, to adopt a non-interventional foreign policy (the so-called «mani nette», ‘clean hands’),

expansion unfurled as late as 1882 in what is currently the Eritrean territory. Further attempts to carve out new territories were harshly ousted by military upheavals (the battles of Dogali in 1887 and Adwa in 1896); then, spurred on by the Imperial nationalist movement, expansion resumed in 1911 towards Tripolitania and Cyrenaica which, at that time, were under the rule of the Ottoman Empire.

The fascist regime, which came to power in the 1920s, resumed its quest for expansion and in consequence successfully conquered the Libyan hinterland; then, in 1935-36, it went on to undertake what was to be its last colonial war against the Ethiopian Empire. Italian occupation there was very short-lived as during the course of events of World War II, between 1941 and 1943, all the African territories belonging to the Fascist Empire fell into the hands of Allied forces. Hence, during the early post-war peace treaties, despite Italian government attempts to keep hold of the pre-fascist territories, decree granted independence to all such territories with the exception of Somalia, which was assigned to the Italian administration (AFIS) until 1960.

Italian colonialism unfolded for little more than 60 years. From an economic perspective it did not have much of an impact on the national trade balance; nor did it become a sought-after destination for the emigration of national workers (with the exception of that brief episode in Libya with just over 30 thousand Italians). Nonetheless, further considerations would lead us not to underestimate the importance of this aspect of our own national history and that of Africa. Two such aspects particularly worthy of mention are, firstly, the fact that just like other European powers, even Italian expansion had a strong disruptive and destructive impact on local civilisations. As a good example of this, it is well to remember the elimination and deportation of members of the Libyan resistance during the 1911-12 invasion, and the further deportation of the nomadic population of Jebel Cyrenaico (100 thousand people along with all their livestock, that was their only means of sustenance) during the Fascist 'recapturing' of the hinterland which occurred in 1930-31¹. Otherwise, there is that shameful and generally disclaimed issue of Colonial-State racism that preceded and accompanied those regulatory laws against the Jews in 1938².

Along with this realm of violence and dominion, Italian colonialism played an important role not only on a cultural level but also influenced domestic policies. This was especially the case when it came to the complex task of creating a

¹ About this specific subject see G. Rochat, *La repressione della resistenza in Cirenaica (1927-1931)*, in *Omar al Mukhtar e la riconquista della Libia*, Milano, Marzorati, 1981. In general, about the Italian colonialism, the books of reference are still the six volumes by A. Del Boca, *Gli italiani in Africa Orientale*, 4 voll., Roma-Bari, Laterza, 1976-1984 and Id., *Gli italiani in Libia*, 2 voll., Roma-Bari, Laterza, 1986-1988. The overall more recent reconstruction is N. Labanca, *Oltremare. Storia dell'espansione coloniale italiana*, Bologna, il Mulino, 2002.

² G. Gabrielli, *La persecuzione delle unioni miste (1937-1940) nei testi delle sentenze pubblicate e nel dibattito giuridico*, «Studi piacentini», n. 20, 1997, pp. 83-140.

national identity and of nationalising the masses, all of which took place between the end of the 19th and the first half of the 20th Centuries, and which also saw the involvement of the military forces and education system. The urgent need to impose a mass education system, that was geared towards fortifying the notion of subjection and the attribution of a very precise subordinate role, also implied the development of that feeling of national belonging which was, nevertheless, quite alien to the experiences and the history of those countries that had merged in the Kingdom.

This need to 'nationalise' the lower and middle classes, and to create a powerful image of the nation was a growing requisite that was common to the countries of Europe at that time (this being characterised by an ever-increasing access to public life); however, in a newly-founded country like Italy³, it became a rather crucial issue.

The construction of this new Italian image was also nourished by the colonial narrations in which the nation in arms showed off its expansive power, dominated lands, celebrated its heroes, cried for its martyrs and rendered its own image sacred. Such an image grew by contrast, and in close connection, to a representation which in many respects was quite to the contrary: to the geographical peculiarity, that was conveyed by means of travel magazines and the accounts of explorations and catholic missions and which, through countless interventions, became widely diffused throughout all the social classes⁴.

At the same time, this 'collective construction of Self' was spread by way of the invention and narration of 'the Other' and of 'Elsewhere', that were represented by the anthropological descriptions of the bodies of the subdued populations and of those yet to surrender: as depicted in the emerging images of the conquered lands, of those to be explored, and of the regions yet to be acquainted with directly. The populations of the African colonies were portrayed by placing particular emphasis on their diverse customs, civilisations and «race», even to the point of constituting a geography that was dense with diversity and distances with respect to the matrix of the European, and Italian man. Such differences turned out to be rather functional in conferring a gratifying self image of superiority to Italians and Europeans. Those overseas landscapes were at first characterised by an exotic charm and mystery that could only be unshackle by the wildness of a nature uninterrupted ever since the dawn of natural history; then, in correlation with the advancement of the expansion process by the «civilised» territories, such features were merged with a «domesticated» natural world that was made productive by the «capable» and «expert» hand of the coloniser.

³ G. Mosse, *La nazionalizzazione delle masse*, Bologna, il Mulino, 1975; M. Nani, *Ai confini della nazione*, Roma, Carocci, 2006.

⁴ F. Surdich, *La rappresentazione dell'alterità africana nei resoconti degli esploratori italiani di fine ottocento*, in M. Colin, E.R. Laforgia (edd.), *L'Afrique coloniale et postcoloniale dans la culture, la littérature et la société italiennes*, Caen, PUC, 2003, pp. 41-60.

2. *Studies subsequent to decolonisation: the slow liberation*

The research and study of these two aspects of colonialism – the impact on African populations and the close-up confrontation with otherness for the creation of a new national image – have by no means been an easy feat in Italy. The historiography of Italian colonialism, contemporary to the possession of the colonies, was evidently an offshoot of the imperialist perspective, which considered these possessions fitting for the nation's well-being, and which constituted a sufficient yardstick in justifying this expansion. Moreover, this historiography even shifted the legitimacy of the conquest directly onto the very populations that had been conquered on the grounds of their not being sufficiently evolved for self-determination and so, automatically benefiting from the Italian presence as the bringer of civilisation.

It was only in a latter post-war period – marked by the end of the territorial possession and the world-scale affirmations of the fight for independence and of the decolonising process – that Italy also underwent a slow, contrasting revision of its own historiography. Alongside and in contrast with the colonial standpoint, a different prospective gradually emerged from which to look at the chapter of its own national history and that of the African countries that had been subdued.

It was particularly difficult in Italy to carry out a historical review for the very fact that decolonisation did not occur as a direct result of the pressure imposed through the claims for independence by the subdued populations – a process which in countries like France had left deep scars, but which partly led to an active re-elaboration of the narrations that had been established in the past – but indirectly via the defeat suffered at the hands of the military hostilities during World War II. In the early years, this political element generated an attitude of revival of the colonial perspective of the past that was led by the very same historians and functionaries of the old Italian African Ministry, rather than being a critical review, which would evidently have been the first indispensable step towards a collective re-elaboration of an imperial past.

The historians involved in the arduous task of rewriting and re-elaborating thus had to work from the outside and, often, even against the most institutional historiography; it is enough just to consider Angelo Del Boca who, starting out in the 1960s with his first publication on the conquest of Ethiopia, had to work stubbornly while being denied access to the Italian African Ministry's archives, which were reserved for those historians who were in favour of Italian colonialism. The resulting six volumes, published between the 1970s and 80s, and dedicated to the experience of Italy in Africa – even today being the starting point for any scholar wishing to pursue a study on Italian colonialism – were achieved despite his research being met with strong opposition from the cultural sectors who, rather than accepting his work as a documented historical reconstruction, saw it as an act of offence towards national recollection.

Only at the end of this difficult and contrasting initial phase of the review of studies on the political history of Italian colonialism, was he able to produce an opus of reflection and excavation focused mainly on the cultural and propagandistic aspect that accompanied public opinion during the colonial years. To understand the viewpoint unfurled in this paper, it is rather important to have a clear idea of how this research on 'colonial culture' developed (even if only by mention), given that the deeds of the Italian Education System in the propagation of colonial discourses and on Africa are deeply-rooted in this vast, eclectic and relatively new field of study.

3. *Imperial popular culture and colonial representations*

The first breakthrough in this direction was, without a doubt, the catalogue that accompanied the exhibition *Si e no padroni del mondo* set up in Novara in 1982 by a group of historians co-ordinated by Adolfo Mignemi⁵. The focus of the research in this volume was on the images and representations produced by Fascism in the military campaign to take over Ethiopia. Qualitatively and quantitatively speaking, this period was the height in the history of national colonialism with regard to the diffusion and propagation of images, speeches and descriptions of the African colonies. For the very first time in Italy, the research of Mignemi examined the growth of the fascist propaganda machine; only this time the analysis was not restricted to the spheres in which a methodical unearthing had already taken place (such as cinema, the press, literature and so on) but also extended into other important realms of production and diffusion (such as radio, the theatre, advertisements, mural propaganda, coins and stamps, museum exhibitions and events, photographs of propaganda, and the personal diaries and photographs of the soldiers themselves). The object of the inquiry was no longer the production of specific forms of media, but the articulation of colonial and imperial public communication as a whole in the context of contemporary communication.

Among those fields under investigation, an entire in-depth chapter was dedicated to the Education System⁶. The analysis, even in this sub-section of communication, attempted to dictate the coordinates in order to recreate and restore the complexity of the sources and of the entire interdisciplinary stimuli that were in circulation and, that contributed in shaping the overall significance

⁵ The exhibition was prepared by the Istituto per la storia della resistenza e dell'età contemporanea «Piero Fornara». In the analysis I referred to the catalogue that contains the materials and papers that accompanied the exhibition: A. Mignemi (ed.), *Immagine coordinata per un impero. Etiopia 1935-36*, Torino, Editoriale Forma, 1984.

⁶ F.O. Zorini, *Libro e moschetto*, *ibid.*, pp. 46-79.

of the expansion into Africa in the eyes of school children and teachers. In order to perform this, the editors not only analysed those sources that could pay witness to daily school life (such as the chronicles and observations compiled by a 2nd and 3rd year Primary School teacher from a municipality of Novellara between October 1935 and January 1936), but also extracurricular material, such as childhood literature and also comics and children's magazines⁷, which was just as decisive in the formation of the childhood imagery of that time. It is true that other types of sources, although referred to in the text, were examined with the sole intention of illustrating the context (that is to say, the communicative universe of that period), and were not interrogated specifically on the theme of Imperial War; of Africa; of the colonies and the knowledge and misconceptions that were in circulation (school exercise books, school regulations, educational signage). Nonetheless, the way was now clear and the necessity for, and productivity of, a coordinated analysis of the elements that composed scholastic and juvenile communication was strongly affirmed.

Also during the same period, other national historiographies, that began to investigate the images and representations connected to their own colonial past, went in a similar direction. I am particularly referring to Belgium, with its exposition *Le Noir du Blanc/Wit over Zwart* in 1991⁸, but above all to France and Great Britain.

In Great Britain it was John MacKenzie who, in the mid 1980s, opened up a season of analysis on the multiple sectors of mass communication that accompanied the highest point of the British Empire and that sustained and propagandised its *raison d'être*. However, at the same time, Nicola Labanca noticed the development of a parallel reflection on British patriotism that saw the production of representations of the colonies and of otherness (to which it was connected) as functionally cordoning the boundaries – even imaginary ones – of the national community⁹.

In France, with its 1994 exhibition, *Images et Colonies*, a particularly in-depth and very interesting collective path of excavation was embarked on, that delved into the incredible patrimony of images and representations of the colonies and their inhabitants that were produced and distributed between the

⁷ The catalogue in a section reproduces and comments the Liebig figurines of the series *Italian Empire* that they were printed and distributed in those years (*ibid.*, pp. 146-149).

⁸ F. Andrillon *et al.*, *Racisme, continent obscur: clichés, stéréotypes et phantasmes à propos des noirs dans le Royaume de Belgique*, sous la direction de J.-P. Jacquemin, Bruxelles, CEC Coopération par l'Éducation & la Culture-Le Noir du blanc/Wit over zwart, 1991.

⁹ J.M. Mackenzie, *Propaganda and empire. The manipulation of british public opinion, 1880-1960*, Manchester, Manchester University Press, 1984; Id. (ed.), *Imperialism and popular culture*, Manchester, Manchester University Press, 1986; R. Samuel (ed.), *Patriotism. The making and unmaking of British national identity*, 3 vols., London, Routledge, 1989. The Labanca's reflection is in N. Labanca, *Imperi immaginati. Recenti cultural studies sul colonialismo italiano*, «Studi piacentini», n. 28, 2000, pp. 145-168.

mid 1800s and the 1960s¹⁰. Such French works have since been afforded a certain amount of continuity; for instance, particular attention should be paid to their recent exhibition: *Exhibitions. L'invention du Sauvage*, that was set up in the prestigious Parisian museum of Quai Branly, and in which they aimed to perform an analysis and a period categorisation of the implicit and explicit messages that were disseminated and which acted as a social pedagogy of the necessity and meaning of colonial rule.

In Italy, it was Nicola Labanca – a national reference point for a new wave of studies on Italy's colonial past – who continued in that direction. From the very outset he tackled the complex world of the colonial expositions, that were one of the most important arenas of the time in accomplishing the diffusion of a common colonial sense of feeling among the population. In the volume *L'Africa in vetrina* – a collective volume also demonstrating that certain types of research are advantageous when they manage to combine the talents and strengths of several scholars – analysis is carried out both on the museum restructurings that aim to include colonial history in the widest possible prospective of national *Risorgimento*, and on the celebrative and propagandistic expositions that were, in the period subject to analysis, one of the most effective mass mediums for the purpose of a colonial pedagogy addressed to large numbers¹¹.

Although less organic, but just as packed with elements referring to the analysed perspective in this account, the earlier-mentioned French research generated the impulse and a further opportunity to reflect. In fact, in Italy, in the second half of the 1990s, another exposition was produced which carried the same name as that used earlier in France – *Immagini & Colonie* – even though it concentrated on the anthropological aspects. A series of local re-staging (Bologna, Turin) and a collection of accounts, which appeared in «Studi Piacentini», were an ideal opportunity for further inquiries into the regional representations, with openings dedicated to schools and the first general considerations on this new series of studies¹².

¹⁰ N. Bancel, P. Blanchard, L. Gervereau (edd.), *Images et colonies*, Paris, 1993.

¹¹ N. Labanca (ed.), *L'Africa in vetrina. Storie di musei e di esposizioni coloniali in Italia*, Paese (TV), Pagus, 1992. See also A. Triulzi, *L'Africa dall'immaginario alle immagini. Scritti e immagini dell'Africa nei fondi della Biblioteca reale*, Torino, Ministero per i Beni Culturali e Ambientali/Biblioteca Reale di Torino & Regione Piemonte, 1989.

¹² E. Castelli (ed.), *Immagini & Colonie*, Montone, Centro di documentazione del Museo etnografico Tamburo parlante, 1998. C. Pennacini (ed.), *L'Africa in Piemonte tra '800 e '900*, Savigliano, Centro Piemontese di Studi Africani/Regione Piemonte, 1999. Some reflections about the scholastic materials are in G. Gabrielli (ed.), *L'Africa in giardino: appunti sulla costruzione dell'immaginario coloniale*, Anzola dell'Emilia, Grafiche Zanini, 1998. The collection of essays about *L'immaginario coloniale italiano* appeared edited by N. Labanca in «Studi piacentini», n. 28, 2000. I signal above all here the reflections developed in the introduction by Labanca, *Imperi immaginati. Recenti cultural studies sul colonialismo italiano*, cit.

4. *The role of scholastic communication about the colonies: creating of an identity, the portrayal of Otherness*

The first in-depth inquiries in Italy, based on the theme of scholastic communication relating to the colonies, were carried out against this background of research, and the 1930s is undoubtedly the most widely studied period. In fact, the Fascist regime campaign to invade Ethiopia was launched as a full-scale war, with massive deployment of not only military means: unlike typical colonial campaigns carried out by other European powers entrusted to limited colonial troops, the invasion of Ethiopia brought about the direct involvement of half a million soldiers and military workers. Parallel to this, the internal front was also involved in the conflict on a large scale. In fact, the League of Nations decided to protect Ethiopia, the direct victim of Fascism, by imposing a commercial embargo on Italy. Despite this, however, the Fascist Regime was able to transform the hardships brought about by the restrictions on imported products into an unprecedented patriotic commitment that combined the backing of the war with a massive measure of chauvinistic and autarchic propaganda. The Fascist project to construct a «New Italian» was thus able to unfold with unprecedented power: the effort in endeavouring to transform national identity by strengthening virility, racial superiority, imperialism and expansion as a natural consequence of the asserted exuberance of populations, reached levels of intensity, capillarity and involvement as never seen before¹³. In virtue of these characteristics, during the period of mobilisation and in the years that followed, even schools became ground for the deployment and multiplication of propaganda that affected all areas of teaching.

Now let's take a look at a brief review of the studies in which the theme of colonialism in schools during the 1930s was specifically dealt with.

Riccardo Bottoni is among those scholars who dealt specifically with the school system during that period. In his first essay in 2006¹⁴, he analyzed the wordings found in the school notebooks that had been gathered and conserved in the Historical Archives of the National Institute of Educative Research of Florence, and that constitute the most relevant archival collection to date in Italy of its genre. The extensive collection of school-work produced at the time with a mainly public and exemplary purpose and, therefore, characterized by a particularly high level of zeal by the teachers themselves, enables us to evaluate the totalitarian aspect of the mobilisation that accompanied the

¹³ For a recent reflection you see the collection, follows to the 2006 conference, edited by R. Bottoni, *L'impero fascista. Italia ed Etiopia (1935-1941)*, Bologna, il Mulino, 2008.

¹⁴ R. Bottoni, *La guerra d'Etiopia a scuola. Il colonialismo italiano e l'Impero nella scuola fascista*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 13, 2006, pp. 125-151.

conquest campaign. In a continuous reference between book covers and the descriptions contained in the jottings of mainly Elementary school pupils, the image portrayed of Africans is of a somewhat barbaric nature.

In these books and exercise books the Ethiopians are cruel slave drivers that ferociously tortured their ignorant, or enchained victims who were just waiting to be delivered to freedom and civilisation by Italians in arms (namely, the fathers and uncles of proud pupils). In another paper prepared for the 2006 Milan Convention on the Fascist Empire, Bottoni follows the same theme but, this time, from a political and educative viewpoint, dwelling on Ministerial choices to prepare the school system for the war, and then, on the transformation of the contents of teaching material and of the educative approach throughout the years to come, towards the new realm defined as «Imperial»¹⁵. On the base of two of the most important magazines of the time, «I diritti della scuola» and «Scuola italiana moderna», and a few volumes dedicated to the role of the school in the new climate, the author manages to show the «wide and full convergence between Catholics and Fascists on the grounds of the so-called imperial pedagogy»¹⁶.

The role of the Catholic-inspired pedagogy is also the object of the in-depth analysis carried out by Luciano Pazzaglia on sources from the publisher *La Scuola* of Brescia, which was of catholic orientation and deeply rooted in Primary schools. The study extends from the moment of preparation for the 1935-36 war against Ethiopia and goes on to monitor the developments in the years that followed, that were characterized by an attempt to diffuse an imperial conscience even in schools up until WWII, through the propaganda that accompanied the promulgation of the racist policies. In particular, the research is carried out on the magazine, «Scuola italiana moderna» that was very widespread among Elementary school teachers; nonetheless, it widened its gaze towards the extra-curricular publications of the very same publishers that was addressed both towards the teachers and pupils¹⁷.

The essay, therefore, provides a closer look at the characteristics of the support that the pedagogues and cultural organisers of the magazine gave to the colonial campaign and, in general, to the colonial politics of Fascism.

In particular, besides highlighting the theoretical and political interventions that appeared in the magazine, Pazzaglia also went on to describe, in broad terms, the exemplifying informative proposals that were offered to the teachers through those pages destined to provide concrete help in the implementation and in the teaching of various subjects. This is a particularly interesting aspect

¹⁵ About the Ethiopic war period see: R. Bottoni, *La 'marcia da Roma' a scuola. Fascisti e cattolici per la 'civiltà'*, in Bottoni (ed.), *L'impero fascista. Italia ed Etiopia (1935-1941)*, cit., pp. 321-365.

¹⁶ *Ibid.*, p. 365.

¹⁷ L. Pazzaglia, *La Scuola Editrice e la politica imperiale fascista (1935-1943)*, «Pedagogia e vita», vol. 63, n. 1, January-February 2005, pp. 100-130.

since this widening of the sources confers depth to the analysis of the doctrines that were in circulation at the time and allows us to verify how, in Elementary schools, that were characterized by the imposition of the 'Book of the State,' even the educational support provided by magazines reinforced the stance of the Regime's pedagogy. In fact, the risk of carrying out a great deal of research and reflections on scholastic activity in a regime of totalitarian tendency such as Fascism, is a narrowing down of the analysis to the proposals that come from the central power alone (in this case, from Elementary schools and the all important pages from the 'Book of the State'), by considering them as if they were a catalogue of obligatory and, therefore, possible themes. In reality, even without denying the conditioning power of those pages, the phenomenology of the true teachings was much more complex and called into question the concrete articulation of the educational works (of which a magazine with many extensively and pragmatically compiled sections on curricular proposals constitutes an emblematic example).

Closing the methodological parenthesis and returning to the contents of the account, it quite clearly emerges that «adhesion of the magazine to the colonial politics of Fascism [was] total» and that, since the autumn of 1935, the most significant articles were dedicated to supporting and validating the motivations which had led the regime to undertake the campaign for conquest. To the general theme, like the right to guarantee, to one's own population, an alternative future to that of emigration to foreign lands, they strongly added the duty to enact a policy of civilising mission, which was considered rather important as it was seen as having a close relationship with the Christian Evangelisation that had been undertaken by the church in the past.

Taking a closer, more detailed, look at the proposal of concrete educational activities addressed to teachers, the pattern appears of many activities reproduced in the chronicles of the time and in many students' exercise books and teachers' papers. These include the invitations to fill in «Homeland Albums» with cuttings from newspapers; the perusal of letters from the front line; the growing attention towards maps in order to follow the invasion step by step; the exhortation to use modern technology such as radio, cinema and even slides produced for the occasion by the very same publishers. Further to this, the call towards the initiatives of the missionaries frequently emerges as one of the characteristic traits of the cultural proposals on the teachings of the colonies: with the deeds that they had continuously performed over the previous decades, they were presented as being the pioneers that had already paved the way for the new mission to bring civilisation to the African territories.

The conquest also provided publishers with an opportunity to reorganise and strengthen a chain of children's storybooks that changed title, passing from «Geographical readings» to «Colonial readings» in which texts by the likes of Giuseppe Fanciulli and Cesare Pico converged.

After the conquest, during the years in which Minister Bottai resumed and promoted the Mussolinian watchword in schools to create a shift in life to an Imperial level («portare la vita sul piano dell'Impero»), the interventions in the magazine met the Regime's expectations with the purpose of building a Catholic nation. This invite was addressed to teachers with the intention of them feeling «the educative value in terms of the building of a national conscience and exalting their view of the victories, not as the extermination and death of people, but as the good that comes from pain and valour in making Italy, and the world (according to Christian ideals), a better place»¹⁸. As Don Giuseppe Tedeschi once wrote: what was happening in Ethiopia was greeted by the informative magazine as being the triumph of the «magnificent Roman civilisation [...] made perfect by Christianity».

I will also point out the attention that the magazine paid to schools of the Empire, which is interesting herein, not so much for the hypothesis regarding the growth of scholastic politics in the colonies, but for the image that was revealed of young Africans and their relationship with culture – all of which clearly ending up under the eyes of the kingdom's teachers.

The citations that emerge from this are indeed significant and depict the African child as being «wild», unruly to hygiene and uncivil, whereas the school project to be installed in the promoted colony, through the pages of the magazine, presupposes the clear refusal of the egalitarian idea – coherently with the realisation that was to become the Regime. It proposed the rigid division of three domains based on the origin of the pupils: European, European and Asian guests, the indigenous population; it also proposed an absolutely national curriculum – the Italian language and teaching content.

In the end, Pazzaglia recognises, on the trail of the studies carried out over the last twenty years, the strong genealogical and typological connection that ties the entire colonial issue to the growth of the Regime's racist policies. In actual fact, as seen from the cited documentary material, the pedagogic proposals, that were empowered by the conquest of Ethiopia, underwent an important evolution within the standpoint that followed and sustained the adoption of the Regime State's racial politics.

Despite refuting the tradition tied to the «blood myth», after 1938 the editorial team of *La Scuola* produced an invite on the pages of its magazine to «feed the Italians with an unwavering racial conscience» and to safeguard the purity of its own ancestry. The acknowledgement and approval of the Imperial Fascist undertaking (on the grounds of the civilisation mission nourished by the Roman and Christian traditions) now became stronger because the superiority was based on racial belonging – albeit not in the same manner as that practised by the Nazis.

¹⁸ *Il valore educativo della vittoria*, «SIM», vol. 45, n. 17, March 1936, p. 213, cit. in Pazzaglia, *ibid.*

With regard to the connection between colonial pedagogy and racism, I would like to point out some of my own studies that converge with the conclusions of Pazzaglia, starting with the section dedicated to schools in the exhibition *La menzogna della razza* in 1994, dedicated to the Fascist racism¹⁹. The printing and diffusion of the volume *Il Secondo Libro del Fascista*²⁰, inasmuch as text of the *Fascist Culture* topic, was published by the regime for Middle schools following the State's option on racism and was marked by a welter of letters from the Ministry with the intention of them being acquired by all students. In this scholastic context, the hendiadys between colonial racism and anti-Semite racism, and the link that ties both to the formation of a superior Italian Fascist identity, emerges with enlightening clarity and reveals an interpretative prospective that binds education and racism to colonial and national identity. Such a prospective was further unfurled in posterior studies that focused particularly on the aspect concerning its reception among teachers²¹. This was also accompanied by an elaboration of the multiplicity of teaching aids and informal material for infancy in an essay on the setting up of the Bolognese exhibition *Immagini & Colonie*, that was dedicated to the images and representations of Italian colonialism²².

5. Long-term analysis

This rather intense and close look at the 1930s, still did not allow long-term elements and those connected with fascism to be distinguished. Therefore, other types of research and opening surveys have been published in order to delve into the scholastic communication that was contemporary to the outset and early development of colonialism – the liberal era – alongside other research that investigated the permanence, the denials and the repressions of the Republican era.

With regard to scholastic communication, Nicola Labanca was undoubtedly the scholar who reflected upon the theme of colonialism with the highest level of discernment and continual interest. He particularly focused on scholastic instruction manuals; paying special attention to Libya, nevertheless, without

¹⁹ Centro Furio Jesi (ed.), *La menzogna della razza. Documenti e immagini del razzismo e dell'antisemitismo fascista*, Casalecchio di Reno, Grafis, 1994, particularly pp. 196-197.

²⁰ Partito nazionale fascista, *Il secondo libro del fascista*, Roma, A. Mondadori, 1939.

²¹ G. Gabrielli, *Insegnare il razzismo. Docenti e presidi di fronte al razzismo di Stato fascista*, in *I fantasmi dell'Altro. Atti della giornata di aggiornamento CESP sul razzismo*, «Quaderni Cesp Bologna», n. 2, gennaio 2003, <[http://www.cespbo.it/testi/quaderno_cesp_2.htm#Insegnare il razzismo](http://www.cespbo.it/testi/quaderno_cesp_2.htm#Insegnare%20il%20razzismo)> (last access: July 15th, 2012).

²² G. Gabrielli (ed.), *L' Africa in giardino: appunti sulla costruzione dell'immaginario coloniale*, Anzola dell'Emilia, Zanini, 1998.

once removing it from its general context dealing with Italian colonialism as a whole. The first organic intervention in this direction was carried out on occasion of the Seminar on the historic Italian-Libyan studies of Siena-Pistoia in 1999²³. This was then followed by a second essay accompanying the research project on Libya's representations in Italian scholastic manuals that was carried out by two young scholars by the name of Giuseppe Finaldi and Francesca De Pasquale²⁴.

As far as Labanca was concerned, the analysis on the manuals was the key to uncovering the responsibility of schools in forming public opinion: «There has never been any doubt whatsoever that, during the colonial phase, the Italian scholastic system operated as a powerful instrument in forging and diffusing 'colonialist' stereotypes and prejudices»²⁵. Now, it was just a matter of carrying out an in-depth analysis to ascertain how this phenomenon had taken shape and form on the pages of textbooks.

According to Labanca, the main limiting factor of the sporadic analyses that had appeared in historic literature up until that moment, was due to the scarcity and haphazardness of the sources that had been analysed. The impressionistic features made the affirmations of the scholars less appealing and, as a consequence, limited their ability to perceive and come up with considerations that might only be considered little more than obvious, such as the presence of Italian ethnocentric prejudices towards the subdued territories. In order to be able to overcome these limits, it was necessary to carry out further inquiries in a specific direction – in this case scholastic manuals – however, this time by endeavouring to broaden documentary support.

Another methodological restriction that Labanca pointed out, is posed by the limited time span that was dedicated to each individual search, thus reducing the possibility of appraising the different attitudes and, hence, of grasping the difference between what was a change and what constituted a development or faint permanence.

Also worthy of note are the methodological considerations regarding the particularity and complexity of the 'scholastic manual' sources, which are all important when it comes to reading and interpreting all the elements deriving from such sources in a distinct and disaggregated manner.

²³ N. Labanca, *L'imperialismo coloniale e la Libia nei manuali scolastici italiani*, in N. Labanca, P. Venuta (edd.), *Un colonialismo, due sponde del Mediterraneo*, Pistoia, CRT, 2000.

²⁴ N. Labanca (ed.), *La Libia nei manuali scolastici italiani (1911-2001)*, Roma, IsIAO, 2003 with essays by N. Labanca, *Introduzione. Sussurri e grida, e silenzi. I manuali scolastici italiani, le colonie, la Libia coloniale*, G. Finaldi, *La Libia nei manuali scolastici italiani 1911-1960* and F. De Pasquale, *Il colonialismo in Libia nei manuali di storia per le scuole superiori editi dal 1950 al 2001*. The book is the final product of the research program about the historical relations between Italy and Libya (Isiao, Istituto Italiano per l'Africa e l'Oriente and Libyan Studies Centre); the *Comunicato congiunto italo-libico* (July 4, 1998) has provided this research.

²⁵ Labanca, *La Libia nei manuali scolastici italiani (1911-2001)*, cit., *Introduzione*, p. 16.

Of utmost importance for Labanca was the awareness that – in an inversely proportionate way to the increase of schooling indexes – at least up until the 1960s, the contents of Elementary school texts were not only chosen in relation to the tender age of the pupils, but also in relation to their social belonging. This school, in fact, for the entire colonial period, was concerned with the literacy of the lower social classes, that is to say, those who were the more likely to have become manual workers or soldiers directly engaged in the colonies.

On the contrary, throughout the early 20th Century, the contents of High School texts destined to form the nation's future elite, were organised to teach a different colony that was to be less stereotypical and were more open towards a number of problematic elements.

Parallel to this fundamental point of view, Labanca cites other, auspicious perspectives, to differentiate the analysis of the available material: according to geographic area (i.e. according to the colony); according to the publishers and to the orientation-ideals of the authors (relative to the Liberal period – a period in which a certain amount of pluralism was still allowed). In the specific analysis that Labanca proposed, even on the foundations provided by Finaldi and De Pasquale, he identified a periodisation that, even to date, can be considered a reference point for anyone wishing to pursue this topic.

The initial period makes reference to the military expansion into the Horn of Africa until the battle of Adwa, and is accompanied by the well-timed encroachment on the pages of 19th Century manuals, on which dissonant voices on national colonial politics can still be found.

This plurality of thought tends almost completely to wane in a subsequent secondary period, distinguished by the conquest of Libya, only to completely disappear during the twenty years of the fascist regime, which was the third phase of this internal periodisation. During the immediate post-war period, which were years devoid of colonies (with the exception of the decade of the administration of Somalia), the continuity of the themes met with silence and the recommencement of the romantic exoticism of the pre-fascist period. At the hesitant and controversial beginning of the 1960s, an authentic renovation of the themes and judgements followed – between the 1970s and 80s – that fed a partial revision of the scholastic image of Italian colonialism.

To conclude, Labanca remarks that the element which best characterises the scholastic vision of the colonies, is the continuity of «colonial interpretation, first; acquitting, then»²⁶ which was the effect of the delay in the maturation of a public opinion liberated by the inherited interpretations that were handed down from a colonial past.

This continuity quite clearly emerges as a unifying tract of the various protagonist «subjects» of the colonies that were talked about at school during

²⁶ Labanca, *La Libia nei manuali scolastici italiani (1911-2001)*, cit., *Introduzione*.

the course of time: first the political authorities; then the nation; then the settlers; then soldiers; then settlers once again; then finally politicians, whereas the voice of the subdued colonial subjects is unheard until the 1970s.

Finally Labanca points out the complexity of the interweaving of the sources and the socialisation venues that contributed in forming the Italian conscience regarding this theme, which was evidently influenced, not only by manuals but also by other numerous elements (from extracurricular to those of a public nature) like, for instance, the exhibitions that we were reminded of earlier.

6. *The republican age*

Giuliano Leoni and Andrea Tappi recently dwelled upon the Republican period and analyzed the section dedicated to the colonies of all the historic manuals, destined for High School students, that have been printed from 1945 to the present day²⁷. They pointed to the substantial connection to the Fascist era, that characterised post-war production and that was often the fruit of the republication of manuals that had already been published in the fascist years, and just rectified in the parts relating to Fascism.

The sections dedicated to the narration of early colonialism, namely that of the end of the 1800s and that of the conquest of Libya in 1911-12, took on those very strong Ital-centric characteristics that had matured in the past, with the heroism of Italian soldiers and the barbarity of the African populations being geared towards the «creation of an identity and of national prestige». Change came about, however, in the 1960s when less emphasis was placed on military heroism in the light of conquests, and the image of an innocent colonialism, which had had little impact on the African society, became progressively hegemonic. That is to say, it strengthened the renowned image of the «italiani brava gente», «the good, hard working Italian people, if nothing else, the victims of other people's decisions especially under the rule of Mussolini»²⁸. Consequently, even though criticism on a diplomatic political level arises concerning the military management of the campaigns of the 1800s or the anachronism of the Mussolinian conquest, up until the 1980s, the «accusation of racist and abusive nature» remains somewhat missing.

Until recent years, the Eurocentric vision of history was the common tract between scholastic commentaries during colonial expansion and scholastic texts written during the course of the decolonisation, which was taking place throughout an extensive part of European possessions. My own account – also

²⁷ G. Leoni, A. Tappi, *Pagine perse. Il colonialismo nei manuali di storia dal dopoguerra a oggi*, «Zapruder», n. 23, settembre-dicembre 2010, pp. 154-167.

²⁸ *Ibid.*, p. 160.

dedicated to these years – which focuses on the phase between the fascist era and the years of the Republic, appeared in a 2011 issue of the journal «aut aut», which was dedicated to the so-called «post-colonial studies». Here, the analysis tries to provide an overview of the closely knit themes of racism and colonialism in school texts. This inquiry followed the development of these themes from the peak of the 1930s through to the 1960s, that was characterised by a mixture of the silence, repression, oblivion and repetition of the stereotypes. In the 1970s, a new sensitivity from a variety of origins contributed to slowly mutating the panorama (the long wave of the decolonisation of the studies on colonial history; the sensitivity towards those anti-racist themes originating from the American struggles for Afro-American rights; the criticism and the opening up to discussions of traditional themes of educational communication)²⁹.

7. *Children's literature*

So far, it has been seen that in order to study, with great gain, the role of the school and scholastic communication in colonial expansion, and the image of Africa and the Africans, it is indispensable to analyse such communication in the general context of the images on this theme, that were produced and distributed throughout society. Another portion worthy of further pursuit is childhood literature which, as it has always lived in close synergy with school practice, constitutes an even more in-depth and specific field of research. Such particular attention is imposed on us, not only by the loan and the exchanging of themes and names between fiction and scholastic publishing, but from the very same complementarities of the registers that ensure the narrative texts are read – both today and in the past – by boys and girls of school age, as if it were a sort of implicit curriculum or integrating background to the official curricular topics. The subject of colonial children's literature thus constituted a wealth of themes and implicit interpretations of the meaning of colonial expansion. Such a source is of great importance in order to be able to acquire an in-depth understanding of this field of popular culture.

Rosario Laforgia, Mariella Colin and Rosalia Franco have recently worked on these themes, and Mariella Colin signed a first overview that was specifically dedicated to the storyline of the Liberal era³⁰.

²⁹ G. Gabrielli, *Razze e colonie nella scuola italiana*, «aut aut», n. 349, gennaio-marzo 2011, with *Appendice di materiali*.

³⁰ M. Colin, *L'Afrique pour l'enfance: aventures et colonialisme dans les livres pour l'enfance et la jeunesse de l'Italie libérale*, in Colin, Laforgia (edd.), *L'Afrique coloniale et postcoloniale dans la culture, la littérature et la société italiennes*, cit., pp. 63-82.

The review of the scenarios and recurring themes allowed Colin to carry out an initial subdivision into three groups between the novels arising from the onset of the years of the politics of Italian expansion, those of the period following the defeat at Adwa, and the new large-scale publications following the conquest of Libya. That is to say, the literature was strongly influenced and substantially in keeping with the political climate present during the stages of expansion that were to follow. The early volumes do not concentrate solely on those territories subject to Italian conquest – still rather limited and not very «popular» – but create a setting for the stories, starting with none other than Salgari and Jack La Bolina, throughout the whole of black Africa. Nor is there a lack, starting from Dogali (1887), of doubtful tones regarding the usefulness of the consequential sacrifices made during the wars of conquest that were flanked by the predominant exaltations and celebrations of their heroes. Dark and unknown, Africa is perceived as a wild and cruel place, and the descriptions of its inhabitants are all too submerged in a lexis of racist naturalisation and animalisation. Following Adwa, in the intermediate period before the new conquest of Libya, Colin reveals the presence, alongside a more classic array of stories, of a derisive and parodic strand that mocks Africa and its inhabitants, often employing heavy and grotesque tracts. After the conquest of Tripolitania and Cyrenaica, the publications once again assumed an intense rhythm, giving rise to new matters like the traits of the Arabs and the Turks, the celebration of that recollection of classic Rome, and a new declination of that racially prejudiced stare, whereas any feelings of doubt or criticism had already disappeared, submerged in the generality of the tales that paid tribute to colonial destiny.

Enzo Laforgia³¹ runs through the three major periods of Italian Colonial expansion (from Assab to Adwa, the conquest of Libya, and the years of Fascism); he studies a choice of passages published in the pages of children's journals and books for adolescents, and places emphasis on the growth and evolution of a national colonial conscience. Early on, from the «Giornale dei fanciulli», adolescents learnt about the existence of these unexplored and fabulous places inhabited by uncivil and fearful-looking people while, at the same time, being educated to the ideals of a national conscience through examples of intrepid explorers and soldiers' courage. According to Laforgia, the ability to fancifully rework the elements of the chronicles and colonial history was shattered in consequence of the enormity of the disastrous defeat at Adwa (1896). However, this was to resume fifteen years later following the conquest of Libya, although, this time, with more of an intense bitterness and with more being lent to the themes which were favoured by propaganda. By then, childhood literature on this matter was no longer able to distance itself

³¹ E.R. Laforgia, *Il colonialismo italiano spiegato ai fanciulli*, in L. Finocchi, A. Gigli Marchetti (edd.), *Editori e piccoli lettori tra otto e novecento*, Milano, Franco Angeli, 2004.

from the rigid role bestowed upon it as translator of a common awareness for the up-and-coming generations. Put to propagandistic use, which does not necessarily mean uniformity or lack of distinction in the expression of themes, it is found to be even more accentuated in the volumes published under fascism, subsequently reaching its peak in production between 1935 and 1939.

Adolfo Scotto di Luzio³² specifically looks at childhood literature during fascism and, through the analysis of colonial novels, identifies in the educative set up (Fascist) that was the load-bearing element of the new production and, that contradicted the adventurous Salgarian version or the exotic novel of liberal inheritance. It was in that literary gap between the two polarities of the «conquest novel» (defined by him as being made up of heroism), and of the «colonisation novel» (made up of the civilisation and Italianisation of the territories and their populations) that the new large-scale production developed and became an upholding element of the popular culture that was diffused throughout the 1930s. The numerous volumes – dedicated, in part, by Giuseppe Fanciulli – render it a well-represented educative project, among others of its kind, that was also analyzed in detail by Davide Montino³³.

The interest afforded to this implicit curriculum obviously goes beyond childhood literature: it can only expand and encapsulate a series of sources of material whose phenomenology is not included in the domain of official teachings, regulated by the study programme and culture of the teaching staff. This is to be found on the boundary between indirect teachings, which seep through into the scholastic environment, and the lives of children and youths; even the officially prohibited ones, which, despite being forbidden, are not less present in the formation of the younger generations. As far as the indirect curriculum is concerned, we refer to, for example, the cover of exercise books which, even as early as the war against Libya (1911) punctuated, with great force and growing impact, school life through the use of images and short stories of propagandistic or exotic nature on the African undertaking and on it having become a national possession. On the other hand, with regard to the forbidden curriculum, of the «under the desk» school life, we detect illustrated children's journals and illustrated stories and comics (from 1910 onwards) that narrate the «accomplishments of the conquest» into hundreds of easy-to-read adventures, full of images that were much loved by students while being decisively ostracized by teachers.

³² A. Scotto di Luzio, *L'appropriazione imperfetta. Editori, biblioteche e libri per ragazzi durante il fascismo*, Bologna, il Mulino, 1996, pp. 198-219.

³³ D. Montino, *Le tre Italie di Giuseppe Fanciulli*, Torino, Sei, 2009 pp. 161-169. Among the other essays about the colonial literature, see also V. Asioli, *L'impero di carta. Il colonialismo italiano di età liberale nell'editoria per ragazzi*, «Studi piacentini», n. 34, 2004 and *L'impero di carta. Il colonialismo fascista nell'editoria per ragazzi*, «Studi piacentini», n. 36, 2004.

With regard to this important material, methodological reflection has advanced with leaps and bounds in recent years³⁴ despite it still being necessary to base the considerations on the specific interesting annotations that can still only be found inside the more general essays³⁵. Among the most interesting publications, the catalogue of the 1985 exhibition, *Strips of Africa: colonialism and anti-colonialism in the African environmental comic*, must not go unmentioned as, still today, it provides a detailed overview of the themes and an important cataloguing of the comics published on the topic on an international level³⁶.

8. *Ideas from across the border*

These aforementioned themes for reflection and research, did not only develop in Italy: they are the result of interest that was generated on an international level, even as a result of the motivation spurred by the mere release of fundamental texts such as *Orientalism* by Edward Said, which are capable of demonstrating the complex connection (both cultural and power-related, simultaneously) that accompanied and permeated colonial and post-colonial relationships.

It is not our place, here and now, to debate about how the «post-colonial studies» have swayed the choice of themes and the approach of historical studies on colonialism over the last twenty years. It is, however, certain that the interest paid to international comparisons, the focus on cultural factors and on how they shaped the image of the *Other* and *Elsewhere*, together with a new, sharper sensitivity to the theme of racism, have become a main feature of even the most recent historiographical inquiries.

This enhances the importance of carrying out new research in this field from a comparative perspective, even more so when the focus is on Italy and when the comparison can be usefully performed with parallel, and often with

³⁴ About the covers of the exercise books, see: J. Meda, D. Montino, R. Sani, *School Exercise Books. A Complex Source for a History of the Approach to Schooling and Education in the 19th and 20th Centuries*, Firenze, Polystampa, 2010; L. Marrella, *I quaderni del Duce tra immagine e parola*, Taranto, Barbieri, 1995. About the image of Africa in the periodical press for children, see: R. Franco, *Colonialismo per ragazzi. La rappresentazione dell'Africa ne «La Domenica dei Fanciulli» (1900-1920)*, «Studi storici», vol. 35, n. 1, January-March 1994.

³⁵ Until today, the best effort to address – in an integrated way – the different sizes of the children's and childhood's thought about war, nation and colonies is made by A. Gibelli, *Il popolo bambino. Infanzia e nazione dalla Grande Guerra a Salò*, Torino, Einaudi, 2005.

³⁶ *Strisce d'Africa. Colonialismo e anticolonialismo nel fumetto d'ambiente africano*, Torino, Provincia di Torino, 1985.

more in-depth and extensive methods of research (both from a temporal and geographical point of view) developed by researchers from countries that themselves are heirs of colonialism.

The singularity of the characteristics accrued by the 19th and 20th Century colonies can only emerge directly from an comparative viewpoint that is able to distinguish convergences from peculiarities. This is true even more so, if – as in this case – it is not so much a theme lying on the State's colonial politics, but rather a segment of their colonial propaganda in Europe: the scholastic education of European citizens towards a colonial conscience.

In France, for example, as briefly mentioned already, studies on the colonial images and imperial vision have shown important progress over the last twenty years that has been able to reach the same depth and amplitude as historiographical research with the ability to communicate the result to the general public³⁷ in an all but easy political climate. It is enough just to bear in mind the shameful Art. 4 of the 23rd February 2005 Act, that forced schools into teaching the «positive role of the French overseas presence»³⁸.

In the realm of this research on the imperial vision, numerous inquiries have been published that have been able to focus specifically on schools: in this particular case we are referring to the essays of Yves Gaulupeau on the images found in textbooks³⁹; to those of Gilles Manceron on the presence of overseas references originating from literature that, between the end of the 1800s and beginning of the 1900s, became *best sellers* in transalpine Primary schools⁴⁰; but, above all, we are referring to the works of Sandrine Lemaire.

³⁷ P. Blanchard, G. Boëtsch, N. Jacomijn Snoep (edd.), *Exhibitions. L'invention du sauvage*, Paris, Acte Sud, 2011 (the book is the catalog of the exhibition being in the museum of quai Branly); P. Blanchard, S. Lemaire, N. Bancel, *La formation d'une culture coloniale en France, du temps des colonies à celui des «guerres de mémoires»*, Paris, CNRS, 2008.

³⁸ Loi n. 2005-158 du 23 février 2005, art 4: «Les programmes scolaires reconnaissent en particulier le rôle positif de la présence française outre-mer, notamment en Afrique du Nord». In <<http://www.ldh-toulon.net/spip.php?rubrique49>> you can read a dossier about the debate which subsequently led to the repeal of the article of the law.

³⁹ By Y. Gaulupeau see *Les manuels scolaires par l'image: pour une approche sérieuse des contenus*, «Histoire de l'éducation», n. 58, mai 1993, pp. 103-137; but see also the more synthetic *L'Afrique en images dans les manuels élémentaire d'Histoire (1880-1969)*, in *Images et colonies*, cit., pp. 66-69 and *La colonisation dans les manuels scolaires depuis le XIX^e siècle*, in *Dictionnaire de la France coloniale*, sous la dir. de J.-P. Rioux, Paris, Flammarion, 2007 pp. 779-786.

⁴⁰ By G. Manceron see *Ecole, pédagogie et colonies*, in Blanchard, Lemaire, *La France conquise par son Empire, 1871-1931*, cit., pp. 93-103. Among others, I point out this essay by M. Semidei; it is still interesting essay despite being actually published in 1966: *De l'Empire à la décolonisation à travers les manuels scolaires français*, «Revue française de science politique», n. 1, 1966, pp. 56-86; also N. Bancel, D. Denis, *Éduquer: comment devient-on «homo imperialis» (1910-1940)*, in P. Blanchard, S. Lemaire, N. Bancel, *Culture coloniale en France. De la Révolution française à nos jours*, Paris, CNRS, 2008, pp. 329-340; E. Savarèse, *École et pouvoir colonial. Retour sur la légitimation de la colonisation*, «Dialogues politiques», n. 2, janvier 2003; and lastly H. Tison, *Les troupes coloniales dans les manuels scolaires*, in *Les troupes coloniales dans la Grande Guerre*, Actes du colloque organisé pour le 80^{ème} anniversaire de la bataille de Verdun, November 27, 1996,

Let us take a look at the account in which the French researcher deals with the way in which the image of Algeria, the most important colony in French colonial history, was gradually introduced into schools of the French metropolitan areas⁴¹. In this essay we observe a widespread sensitivity, even in the eyes of Italian scholars, that is implied by the choice to begin with historic and geographic manuals, which were sources considered as «mirrors of the colonial ideology». Lemaire neither forgets the importance of the *Official instructions*, nor the ‘informal’ material that accompanied school life, which we referred to earlier as the ‘involuntary curriculum’. However, the centrality of the manuals allowed her to follow the evolution that the main themes underwent in the course of time and which, at the same time, allowed her when necessary to detach herself from the privileged use of the source in order to integrate by turning to different types of documentation.

Lemaire demonstrates how, between the 1800s and 1900s, the domination of Imperial education takes on and accentuates some of the characteristics of classic French patriotism (duty, discipline, and nationality: all within the rights and duty of the nation to dispatch a mission to bring civilisation). Therefore, Imperial education acted in shaping 19th Century education that was aimed at the nationalisation of the masses. This form of cultural colonisation of the metropolis, however, began to find an increasing amount of space in manuals especially after World War I.

It was during this period that Algeria became renowned as the «Jewel» of the Empire and that investment into the creation of the colonial conscience reached its peak in 1931 (not by mere coincidence with the Colonial Exposition of Paris). During that period, themes that had already been sketched began to develop fully: white man’s superiority that brings order and modernity became a powerful theme that persevered into the 1950s, while the national pantheon strengthened; populated by heroes (the French) and anti-heroes (the victims of colonisation). These were years in which every intimacy and integration between European city dwellers and Colonial natives – between whites and blacks – was looked upon with ambivalence, at times arousing fascination and at times repulsion (Lemaire places particular emphasis on the racist connotations of the imperial vision, that was certainly more unusual among Italian scholars). It is difficult to look at the articulation of the themes in particular detail on this occasion, but the elements that offer useful comparison are actually quite numerous and stimulating. For instance, the author starts with an opening on a source of great interest that deals with the reports produced by teachers on

Centre Mondial de la Paix, <http://www.stratisc.org/TC_TDM.htm> (last access: July 15th, 2012).

⁴¹ S. Lemaire, *Du joyau impérial à l’amnésie nationale: l’image de l’Algérie dans les manuels scolaires français*, *Internationale Schulbuchforschung / International Textbook Research*, mars 2004. Among her works also point: *Propager: L’Agence générale des colonies (1920-1931)*, in Blanchard, Lemaire, Bancel, *Culture coloniale en France. De la Révolution française à nos jours*, cit., pp. 197-206.

return from their 'updating' journeys to the colony, that were offered by the Ministry at the beginning of the 1930s. The Ministry's initiative aimed at overtly showing the colony in its entirety to teaching staff so as to enable them to vividly convey their experience directly to their classes; this was an *escamotage* that also found its contemporary equivalent in the form of Italian cruises, under the proposal of the *Istituto Coloniale Fascista*, even though it was aimed at only those more worthy students.

Another useful field for comparison, even though seated in the profoundly diverse national directions, can be found in the course of decolonisation and in the attitude adopted in this context by the writers of the manuals. After 1945, Lemaire reveals a particular effort by the writers of French manuals to stage progress, with an over-representation of positive and modernised images even when conflicts – Indochina first, then Algeria – were already dramatically deployed. Therefore, we had a scholastic communication that attempted to ignore reality by substituting it with a modernisation and association project which history, at the time, inevitably took upon itself to demolish. Subsequently, even in France the years ensuing decolonisation were characterised by an obstinate silence – a significant convergence with Italy – that gradually substituted colonial stereotypes from the past and which, up until the 1990s, even impeded schools' every attempt to re-elaborate this rather uncomfortable past.

9. *Research prospects*

At the end of this considerable panoramic look at the shape of the studies carried out, we can only envisage more desirable developments for future excavations and considerations on the Italian state of affairs.

It has been shown that the national school system, intended as part of a wide and varied social educative apparatus, till today, has received sectoral attention from scholars, both regarding the type of sources utilised, and in reference to the periods under inquiry. This is mostly true of the manuals, especially those on history, particularly relating to the years of Imperial conquest, the Ital-Turkish war and the re-elaboration after the colonies had been lost.

As such, it would be useful to complete the study of the chronological intervals which, up until today, have been less travelled by historians and, which extend the analysis to manuals on other subjects – primarily geography – with particular attention to the pedagogy of the images: however, still bearing in mind not only colonial themes, but also that closely related representation of human diversity (given that we are referring to those years in which the racial perspective was a dominant and practically unspoken scientific truth). Moreover, a glimpse

at the evolution of school programmes, in order to understand the dialectics and timing of the relations between Ministerial instructions on the topic of colonialism and the realisations of authors and editors, is by now urgent.

On the other hand, other just as important dialectics exists between the theme, as dealt with in the various programmes and manuals, and what emerges from the ‘involuntary’ and ‘banned’ curricula on which, as we have seen, very important studies have been carried out. It is, therefore, necessary to try and perform a parallel reading of those two areas and gather expectancies, contradictions, overlaps and any eventual diverse versions of themes that circulate both above and below the scholastic desk. Moreover, in order to complete the complex architecture of this theme, it is important not to forget that in Italy, above all during the twenty-year reign of Fascism, external organisations outside the school system vigorously intervened to bring the colonial theme directly into classrooms. Here, we are especially referring to the *Istituto Coloniale* and to the Fascist Youth Organisations (*Gruppi Universitari Fascisti* and *Gioventù Italiana del Littorio*) who, through their initiatives (e.g. composition concourses for the Empire day), squeezed in on curricular teachings, thus strongly conditioning their appearance. In conclusion: it was a complex articulation of common themes, i.e. a polycentric architecture, that contributed to the formation of the national colonial conscience of children and adolescents.

Within this complex task, it is not easy to turn a blind eye on the attention that, in recent years, has been posed on the study of the less disciplined aspects of childhood writings. Such aspects can suggest – even while bearing in mind all the appropriate methodological considerations – a point of view «from below» on the theme, or at least some indication of the quality of the efficacy of the themes, that were agitated by both propaganda and curricula. Although we are aware of the difficulty and ambiguity of what can be defined as being ‘authentic’ in writings produced within a educational convention (even more so for those produced under dictatorship), it is nevertheless true that works like those of Gibelli, on the «popolo bambino», confirm a viable route that, with due methodological caution and a series of significant sources at your disposal, consent an appreciation of the degree of penetration of the propaganda themes, especially in order to understand in which form they were understood and reworked by pupils.

Ultimately, it is necessary for new inquiries to bear the experiences of other imperialisms well in mind and consider them as on-going prerequisites for comparison, so that the ‘national’ effort can not only enrich experiences and other historiographies, but also that the very same national production of knowledge on these arguments is seen as a local contribution to the clarification of a general problem. For the time being, this is certainly a European problem, but little by little is becoming more of a global issue, in a strict comparison set as firmly as possible amid colonial views, colonized views and prospects of a common cultural emancipation.

L'istruzione secondaria in Molise dopo la restaurazione borbonica (1821-1828)

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Secondary education in the Molise Region in the aftermath of the Borbonic Restoration (1821-1828)

ABSTRACT: The Renovation of the school system which was undertaken in Central and Southern Italy under the Napoleonic dominion during the years 1805-1814 had made it possible to establish a centralized and public system of secondary education. Through the analysis of unpublished archival material of the time, the specific case of the area of the Molise gives the Author the opportunity to explore the practical effects, on the territory, of the 'epuration' season which followed the restoration of the Kingdom of Naples and consequently seriously compromised the implementation and development of an educational system, both of humanistic nature but overall of technical and professional (i.e. agrarian) nature – which would compromise the social, cultural and economic modernization of the Borbonic State.

EET/TEE KEYWORDS: Secondary Education; Educational Reform; School System; Social Environment; Italy; XIX Century.

Premessa

La riforma scolastica attuata durante il Decennio francese costituì per il Regno di Napoli la fondazione di un 'sistema di pubblica istruzione' controllato e vigilato dallo Stato, mirante alla formazione professionalizzante ancorata al titolo di studio mediante il meccanismo dei gradi accademici (baccellierato, licenza e laurea).

A partire da questa impostazione sistematica, idonea a creare il passaggio dal regime feudale a quello dello Stato moderno, si avviò, anche nella Provincia di Molise, l'opera di diffusione dell'istruzione secondaria, sotto l'egida dell'intendente Biase Zurlo, che riuscì a concretizzare: la fondazione del R. Collegio Sannitico (1812-1816), deputato a garantire quel titolo di studio che, sostituendo definitivamente il titolo nobiliare, avrebbe costituito lo strumento indispensabile per accedere ai vertici socio-politici; l'istituzione di scuole secondarie ad indirizzo umanistico in tutta la Provincia (1816-1820), finalizzate a trasmettere una formazione culturale costituente la necessaria premessa per generare competenze professionalizzanti; e l'apertura delle prime scuole di agricoltura pratica del Regno (1817-1819), per diffondere conoscenze e innovazioni nel campo dell'agricoltura¹.

Al termine di un travagliato percorso, ricostruito nel saggio pubblicato sul precedente numero di questa stessa rivista², si riuscì ad inaugurare il collegio, ad aprire sei scuole secondarie (nei comuni di: Riccia, Morcone, Bonefro, Baselice, Casacalenda e Trivento) e a far funzionare sei scuole di agricoltura pratica in altrettanti comuni. Nonostante le difficoltà nel reclutamento dei docenti, che comportò una riduzione considerevole delle scuole rispetto alla programmazione di Zurlo, la consistenza numerica delle scuole secondarie ad indirizzo umanistico e di agricoltura pratica in Molise si rivelava, nel 1820, di molto superiore a quella delle altre Province del Regno.

A questi risultati appena esposti fa seguito il presente lavoro che ripercorre le epurazioni effettuate dalla *Giunta di Scrutinio per la Pubblica istruzione* all'indomani dei moti (1820-1821), relativamente al personale del collegio e delle scuole, per far luce su un capitolo della storia dell'istruzione ancora

¹ Per un inquadramento storico delle politiche scolastiche nel Meridione durante l'Ottocento preunitario, in grado di fornire un approccio criticamente rinnovato, si rimanda a: M. Lupo, *Tra le provvide cure di Sua Maestà*, Bologna, il Mulino, 2005, pp. 61 ss.; R. Sani, *Istruzione e scuola nel Meridione dalla Restaurazione all'Unità*, in H.A. Cavallera (ed.), *Marco Gatti e la riforma della scuola. Atti del Convegno internazionale di Manduria, 9-10 novembre 2000*, Manduria-Bari-Roma, Lacaita Editore, 2003, pp. 175-200. Sugli istituti collegiali e liceali ha richiamato l'attenzione A. Scirocco, *Collegi e licei nel Mezzogiorno*, in *Storia delle istituzioni educative in Italia tra Ottocento e Novecento*, Milano, Comune di Milano, 1996, pp. 7-21. Relativamente all'istruzione agraria disponiamo, tra gli altri, degli studi di: De Lorenzo, *Le scuole secondarie e gli insegnamenti di agricoltura nel Mezzogiorno borbonico*, in L. Romaniello (ed.), *Storia delle Istituzioni educative in Italia tra Ottocento e Novecento*, Milano, Edizioni Comune, 1996; Ead., *Società economiche e istruzione agraria nell'Ottocento meridionale*, Milano, Franco Angeli, 1998. Per un inquadramento generale dell'istruzione agraria italiana nel periodo preunitario inserita nella più ampia dimensione europea, si rimanda a R. Pazzaglia, *Il sapere dell'agricoltura. Istruzione, cultura, economia nell'Italia dell'Ottocento*, Milano, Franco Angeli, 2008. Una rassegna bibliografica sull'istruzione preunitaria è fornita da M. Lupo, *Istruzione, economia e società nel Mezzogiorno preunitario: note per una ricerca*, in I. Zilli (ed.), *Risorse umane e Mezzogiorno. Istruzione, recupero e utilizzo tra '700 e '800*, Napoli, Edizioni Scientifiche Italiane, 1999, pp. 1-6, note 1-6.

² F. Palladino, *Biase Zurlo e il sistema d'istruzione secondaria in Molise (1810-1820)*, «History of Education & Children's Literature», vol. 7, n. 2, 2012, pp. 49-77.

nebbioso nei suoi meccanismi, tra i corsi ed i ricorsi, tra le rivendicazioni e le destituzioni, che hanno caratterizzato le *politiche scolastiche* impostate dai vertici ecclesiastici susseguitisi alla direzione della P.I. negli anni Venti e mediate dal ceto politico-amministrativo locale.

*La Giunta di Scrutinio per la Pubblica Istruzione*³

La reazione ai moti del 1820 alimentati dalla Carboneria, diffusa soprattutto tra le fila dell'esercito e tra i rappresentanti dell'istruzione⁴, costituì l'inizio di una involuzione della politica scolastica che ebbe pesanti ripercussioni sulle neonate scuole molisane. A conclusione del nonimestre costituzionale (luglio 1820-marzo 1821), la restaurata autorità borbonica istituì sei 'Giunte di Scrutinio', di cui una destinata alla Pubblica Istruzione col precipuo scopo di esaminare e giudicare la ortodossia della «condotta morale e politica» dei docenti pubblici e privati cui si aggiunse il potere di concedere la licenza di stampa e la facoltà di revisionare i testi⁵.

La presidenza fu affidata al Principe di Cardito⁶ con un preciso mandato esplicitato in dettagliate modalità di intervento, contenute nelle *Istruzioni* del maggio del 1821, diramate dal Ministero degli Interni: andava indagata la carriera a partire dal Decennio francese fino al nonimestre costituzionale, per individuare i «Rei Notorij» e i «Rei presunti», ovvero:

Notorio Reo si reputa:

- 1) Ogni autore o complice di proclami, giornali, e di qualsivoglia stampa irreligiosa o rivoluzionaria
- 2) Chiunque della detta epoca de' 22 maggio 1815 in poi si formò o scrisse lettere criminose, o pure altre ree carte relative da associazioni segrete
- 3) Chi pubblicamente cercò di sovvertire l'ordine pubblico, armando, stimolando, o persuadendo genti, così nella capitale come nelle provincie

³ Elenco delle abbreviazioni utilizzate: ASN = Archivio di Stato di Napoli; ASCb = Archivio di Stato di Campobasso; CGPI = Consiglio Generale della Pubblica Istruzione; GSPI = Giunta di Scrutinio per la Pubblica Istruzione; PG = Presidenza della Regia Università degli Studi e Giunta di Pubblica Istruzione; CLDAPI = *Collezione delle leggi, de' decreti e di atti riguardanti la pubblica istruzione promulgati nel già Reame di Napoli dall'anno 1806 in poi*, 3 voll., Stamperie del Fibreno, Napoli, 1861-1863.

⁴ Sui moti napoletani rimandiamo, tra gli altri, a A. Lepre, *La rivoluzione napoletana del 1820-21*, Napoli, Guida, 1967.

⁵ R.D. 12 aprile 1821, in CLDAPI, Vol. II, p. 3. Sulla Giunta di Scrutinio per la Pubblica Istruzione si veda il saggio di A. Gargano, *I "Maestri Cattivi". Il controllo sull'istruzione a Napoli tra il 1821 e il 1822*, «Sapienza», vol. 57, n. 4, 2004, pp. 459-484.

⁶ Alla vicepresidenza fu nominato il duca di Lusciano; la commissione scrutinatrice era costituita da Gaetano Giannattasio, Domenico Sarno, Domenico Cotugno e Nicola Fergola; segretari Loreto Apruzzese e Desiderio Pallocchi, quest'ultimo dimissionario e sostituito da Paolo d'Arezzo.

4) Chi disertò dalla sua residenza per seguire lo stendardo dei sediziosi

Presunti Rei si reputano:

1) Quei che fecero parte delle cosiddette vendite carbonare, ancorché non fossero intervenuti nell'unione

2) I complottatori, o contra del governo Monarchico, o contra la Real Famiglia, o contra l'autorità del Re N.S.

3) I lettori e i maestri che smaltiscono erronee massime

4) Superiori e direttori di collegi o di qualunque altro luogo di educazione, i quali conoscendo le massime false dei maestri o dei prefetti, abbiano continuato a tollerarli⁷.

Per svolgere nel modo più capillare il proprio compito, la Giunta si diede anche un regolamento interno, recanti istruzioni sulle modalità organizzative, sulla prassi dello scrutinio e sui criteri d'esame dei libri. Tale regolamento fu approvato dal Ministero degli Interni il 9 maggio 1821, il medesimo giorno in cui veniva sciolta la Commissione di Pubblica Istruzione, le cui funzioni passarono alla Giunta⁸.

La GSPI, per reperire informazioni sui soggetti, operò attraverso un canale centrale che aveva a disposizione: i volumi degli atti del parlamento, l'Archiviario di polizia per imputazione politica, il giornale costituzionale e le carte di interesse possedute da qualunque Ministero; e due canali periferici: alti funzionari provinciali e ordinari diocesani, cui venivano richiesti dettagliati rapporti riservati sui docenti⁹. Il sistema, quindi, era costituito da una rete capillare che, dalla struttura statale a quella provinciale, poteva contare su collaboratori fidati appartenenti a livelli sociali diversificati e diretti, sia politici che religiosi; e, all'interno del territorio provinciale, poteva contare su una efficiente ragnatela composta dai rappresentanti pubblici del potere locale e dai prelati delle singole parrocchie¹⁰.

All'indomani dell'istituzione, la Giunta precisava il lavoro da svolgere in questi termini:

Sig.r Intendente

Questa Giunta di Scrutinio della Pubblica Istruzione è stata specialmente incaricata da S.M., che in preferenza di qualunque altro esame si applicasse a vedere seriamente quale sia stato, e sia lo stato morale, e politico de' Licei e Collegi tutti esistenti nel Regno. In virtù di tale sovrano comando dovendosi la Giunta effettivamente applicare a tale Scrutinio, energicamente prega lei, Sig.r Intendente, a prendere in seria considerazione quanto sia

⁷ *Istruzioni alla Giunta di Scrutinio dipendente dagli Interni*, Napoli 17 aprile 1821, in ASN, *Archivio Borbonico*, fs. 662, ff. 115-116; il documento è trascritto in Gargano, *I "Cattivi maestri"*, cit., pp. 479-480.

⁸ *Proposta di regolamento da accettare o sostituire*, Napoli 6 maggio 1821, in ASN, *Ministero dell'Interno*, I, fs. 727; il documento è trascritto in Gargano, *I "Cattivi maestri"*, cit., pp. 480-481.

⁹ ASN, *Ministero di polizia II, Commissione di pubblica istruzione*, fs. 156.

¹⁰ Impiegati ed ecclesiastici si ritrovarono nella condizione di essere contemporaneamente informatori della Giunta di scrutinio per la Pubblica Istruzione e a loro volta soggetti scrutinati dalle rispettive giunte di competenza: la Giunta di Scrutinio per gli impiegati dell'amministrazione pubblica e la Giunta Ecclesiastica di Scrutinio.

geloso l'incarico alla Giunta addossato, ed a quali funeste conseguenze potrebbe portare qualunque spicciola negligenza, che si andasse a commettere in un affare tanto geloso. La salute dello Stato dipende dalla educazione del popolo, e questa nasce dalla Pubblica Istruzione; quindi dovendo ciascuno prender parte in un affare di tanta importanza, ed essendo persuasa dell'attività, e gelosia colla quale vanno gli affari di cot[est]a Prov[inci]a a è pregata sollecitamente prender conto dell'insegnamento, che ha avuto, ed ha luogo ne' Licei, o Collegi siti nella sua Provincia. Specialm[ent]e è premurato il suo zelo nel riferire la morale de' rettori, e Maestri, che dirigono tali stabilimenti: se nelle passate emergenze si è conservata a disciplina, e se il veleno della Carboneria abbia penetrato ne' Luoghi addetti alla educazione de' giovani.

Prendere dev'ella anche conto de' Maestri privati, quali sieno le loro massime, quale la loro morale, quale l'attaccamento all'ordine pubblico. Lo stesso potrà praticare per i Maestri delle scuole sì primarie, che secondarie.

Fida dunque la Giunta poter prestare un esatto servizio allo Stato: veder adempiuto il giusto desiderio di S.M., il quale, sebbene abbia fatto uso della sua innata clemenza nel porre un velo al passato; pure vuole prevedere qualunque altro disastro, che potesse minacciare a' suoi Stati: il che accadrebbe se si continuasse a tollerare Istruttori mal intenzionati, ed in tutta la estensione velenosi¹¹.

Un diverso tono, sia pur con le stesse finalità, assumeva la circolare che la Giunta stessa faceva pervenire, mediante il Ministero degli Affari Ecclesiastici, a tutti gli ordinari diocesani del Regno per garantirsi la collaborazione, nel quadro dei nuovi rapporti tra Stato e Chiesa istauratisi a seguito del concordato firmato nel 1818:

Illustrissimo e reverendissimo signore,

Il direttore della Real Segreteria di Stato degli Affari Interni mi ha rimessa la seguente lettera circolare, che la Giunta di Scrutinio per la Pubblica Istruzione stima doversi in suo nome dirigere a tutti gli ordinari del Regno:

[...]. Vidde [il re], che sebbene avesse diretto tutta la sua cura per l'educazione del popolo ne' principi della sana dottrina e santa Religione Cattolica Apostolica Romana, pure la cosa era riuscita tutta all'opposto. Di fatti nel corso del suo governo si stabilirono tanti licei, tanti collegi, molte cattedre; cose tutte che dovevano dare una certa fiducia di vedere stabilita una uniforme istruzione diretta a rendere stabili le fondamenta del suo Regno, inconcussa la concordia in quel popolo che da Dio era stato affidato nelle sue mani. Difatti non si può negare che l'educazione dall'anno 1799 in seguito andiede sempre in un evidente deterioramento [...]. Le passate emergenze dhe quanto appieno dimostrano il danno che risenti la Chiesa ed il Regno per lo smaltimento di merci erronee e pestifere che sono totalmente aliene dalla religione! Mosso quindi il paterno cuore di Sua Maestà da un giusto dolore e desiderando di dare non solo un pronto riparo al danno già avvenuto, ma prevenire in seguito qualunque disastro dai suoi stati, fin dal 12 di aprile di quest'anno

¹¹ Circolare ministeriale, GSPI all'Intendete di Molise, Napoli 18 maggio 1821, in ASCb, *Intendenza di Molise*, b. 990, f. 83. La generalità della circolare, con il richiamo a «Licei, o Collegi siti nella sua Provincia», fa pensare che sia stata spedita ad ogni intendenza, ma, in assenza di altri riscontri, preferiamo circoscriverla al Molise, tenuto conto di una segnalazione di Alfredo Zazo che indicava, ad esempio, come interlocutori privilegiati della GSPI, per il liceo di Salerno, soltanto due ispettori e l'arcivescovo che, a sua volta, si affidava al procuratore generale della Gran Corte di Salerno (Cfr. A. Zazo, *Un episodio della reazione del 1821*, «Samnium», n. 1, 1931, pp. 80-87).

formò una Giunta Scrutinatrice delle massime anzidette della dottrina e morale di coloro che dalla stessa Maestà Sua vennero prescelti all'insegnamento sia pubblico che privato. La Giunta che vuole secondare in tutta la sua estensione le paterne cure di Sua Maestà da se isolatamente non è nello stato di veder verificato tanto bene, senza il concorso delle autorità costituite. Ma verso quali persone rivolgersi? La natura delle cose stesse lo richiede, che i vescovi per ragione della loro istituzione debbano dare i lumi necessari per conoscere quali sieno quegli individui i quali abbiano smaltite merci così velenose, quali sieno i libri i quali vanno circolando in tutta l'estensione del Regno, dai quali la gioventù succhiò un sì pestifero veleno. I vescovi per diritto divino sono tenuti ad allontanare il gregge dai velenosi pascoli dell'errore; allontanarlo per quanto da loro dipende dalla insubordinazione. Egliino devono personalmente conoscere gli individui delle rispettive diocesi, o che stanno insegnando tali massime, o che cogli scritti abbiano manifestato le loro depravate inclinazioni. [...]. La Giunta formata da Sua Maestà non è destinata a punire: questo ramo è totalmente alieno dalla sua istituzione. Si pretende dal Re, che col mezzo di essa si possa separarsi la paglia dal grano: riunisce per questo ramo le sue cure a quelle del vescovato. Sia però Ella persuasa essersi simili uffici passati anche all'intendenti delle province, poiché se una è la causa comune deve esser la premura, e l'impegno, cioè di barbicare l'errore; piantare nel suo posto la verità. [...] si fa quindi la Giunta un dovere pregare V.S. illustrissima ad aver pazienza di rimetterle un distinto ragguaglio dei professori, direttori e maestri i quali avessero spacciate delle non sane dottrine; come di coloro che avessero resistito al torrente dell'empietà insegnando a norma della ragione religiosa e politica¹².

In Molise, inizialmente, si attivò un unico canale di informazione, quello dei vescovi, in quanto il nuovo intendente, nominato nel luglio del 1821, nella persona del Marchese di Cammarota, si avvalse, per il suo primo rapporto, soltanto delle informazioni provenienti dalle diocesi.

Scrutinio del Collegio sannitico

Gennaro Pasca¹³, vescovo della diocesi di Bojano e responsabile del rapporto sul Collegio Sannitico di Campobasso, per competenza territoriale, a seguito di accurate indagini, comunicava alla Giunta la seguente tabella riassuntiva sul personale:

¹² Circolare, Ministero degli Affari Ecclesiastici ai Vescovi, Napoli 12 maggio 1821, in ASN, *Ministero degli Affari Ecclesiastici*, fs. 1992; documento trascritto integralmente in Gargano, *I "Cattivi maestri"*, cit., pp. 482-483.

¹³ G. Pasca, nominato a capo della Diocesi nel 1819, ebbe parte attiva nelle vicende educative del periodo, promuovendo presso il Ministero degli affari ecclesiastici uno progetto di riforma della morale pubblica che prevedeva, tra l'altro, l'istituzione delle Congregazioni di Spirito per gli studenti, in seguito decretate dal governo; cfr. A. Gargano, *I "Cattivi maestri"*, cit., pp. 465-466. Sull'attività diocesana svolta da G. Pasca si veda: M. Miele, *La diocesi di Boiano-Sepino tra Sette e Ottocento. Rilievi sulle condizioni del clero*, in E. Narciso (ed.), *Dal comunitarismo pastorale all'individualismo agrario nell'Appennino dei tratturi, Atti del convegno Giuseppe Maria Galanti, 25-28 aprile 1991*, Santa Croce del Sannio, Istituto Storico "G.M. Galanti", 1993, pp. 291-317.

Nomi e Cognomi	[Ruolo]	Morale	Condotta Politica	Osservazioni [del Vescovo]
Alessandro dell'Erba	Rettore	Buona	Carb[onar]o dopo il 7 luglio [1820]	<i>N.B. questa Carb[one]ria fu denominata così, ma fu in effetti un' unione pub[blic]a di molti Sig[nor]i della città, con intelligenza delle Autorità locali per unire una forza, che potea opporsi all'unione de' pochi veri Carb[onar]i in Campobasso, i q[ua]li come dicesi minacciavano una totale, e generale destruz[io]ne. [Verso il rettore] vi furono anche delle minaccie credutosi opposto a sentimenti liberali</i>
Francesco Laccone	Vice rettore	<i>idem</i>	<i>idem</i>	<i>Idem come sopra</i>
Nicola de Mattheis	Maestro di Matematica Sublime		<i>idem</i>	
Can[onic]o Alfonso Filipponi	M[aest]ro di Filosofia	Lodevole	<i>idem</i>	<i>A' stampati varie opere drammatiche che potranno leggersi – Vedi l'osservaz[ion]e di sopra anche per lo contro scritto Filipponi</i>
Raffaele Afflisio	Maestro di Carattere [calligrafia]		<i>idem</i>	
Libero Bozzi	Maestro di scuola primaria, e lingua italiana	Buona	<i>idem</i>	
Biase della vecchia	Maestro d'Umanità	<i>idem</i>	<i>idem</i>	<i>Idem come sopra</i>
Giuseppe Fusco	Maestro di Grammatica	<i>idem</i>	<i>idem</i>	<i>Idem come sopra</i>
Giuseppe Carlozzi	Prefetto d'ordine	<i>idem</i>	<i>idem</i>	<i>Idem come sopra</i>

Bojano, 19 giugno 1821¹⁴

¹⁴ Il documento originale annota tra le "Osservazioni" il "Ruolo", da noi indicato in colonna; Rapporto, G. Pasca alla GSPI, Boiano, 19 giugno 1821, in ASN, *Dicastero dell'Interno Polizia*

Venivano designati come Carbonari: il rettore e il vicerettore, rispettivamente abate e canonico; 6 docenti, tra cui 5 ecclesiastici, ed il prefetto d'ordine, a sua volta sacerdote¹⁵. Tra gli insegnanti, solo il docente di Lingua francese, Michele Petitti, non risultava membro della setta, mentre nessuna annotazione riguardava il contabile, l'economista e i tre prefetti di camerata in servizio nel Collegio Sannitico¹⁶. Inoltre, dei 9 settari segnalati dal vescovo, 6 di essi venivano annoverati come membri di un presunto «partito della resistenza», non meglio definito nei contorni politici.

Il rapporto del vescovo ebbe conseguenze gravissime: sentito il parere della Giunta di scrutinio, la Segreteria di Stato degli Affari Interni, in nome di Sua Maestà, ordinò l'immediata destituzione di tutti gli annotati dall'ordinario diocesano¹⁷.

Come registrò l'intendente, le destituzioni sconvolsero la Provincia, che in un sol colpo vide minata l'esistenza stessa del Collegio, «che rimarrà deserto» per mancanza di degni sostituti¹⁸ e, prendendo spunto dalla richiesta della GSPI di eventuali integrazioni rispetto ai rapporti inviati, lo stesso intendente tentò di ridimensionare le accuse affermando che tutti i destituiti sostenevano «di non aver mai fatto parte di Società Segrete» e continuava, evidenziando una buona dose di malcelato disagio e una chiara ammissione di evidente superficialità nella compilazione del proprio rapporto:

Ho l'onore di manifestarle con quella ingenuità che si conviene al mio carattere, ed al suo alto rango, che l'enunciato mio rapporto [11 dicembre 1821] fu basato interamente su quello speditomi dal Vescovo della Diocesi di Bojano, al quale io mi diressi per avere gli opportuni schiarimenti sull'assunto, ed in confidenza se questi equivocò equivocai anche io; non dovend'omettere altresì di farle riflettere per discarico del proprio dovere, che siffatto mio rapporto era ancora per istrada, quando la giunta di scrutinio già segnato avea la destitui[io]ne di professori suddetti. Questa osservaz[io]ne ad altro non tende, che a persuaderla di non essersi la destituzione poggiata sul mio semplice rapporto, ma bensì esister dovevano presso

della Luogotenenza, Giunta di Scrutinio del ramo amministrativo, fs. 50. In realtà, questo rapporto risulterà rimaneggiato poiché la GSPI consentì al Vescovo di modificare la prima stesura nei suoi stessi uffici. L'originario rapporto, spedito un mese prima, non presentava le osservazioni contenute nel *Nota Bene* riportato da noi in corsivo.

¹⁵ Il vicerettore in quel momento reggeva provvisoriamente anche la cattedra di Retorica dopo il trasferimento del titolare Giambattista Torti nella scuola secondaria di Morcone.

¹⁶ Il corpo docente del collegio annoverava anche Giuseppe Sorbo, docente di Italiano ed Elementi di Latino, ma non ancora in servizio (ASN, *CGPI*, fs. 405).

¹⁷ Ministero dell'Interno alla GSPI, Napoli 4 dicembre 1821, in ASN, *CGPI*, fs. 405. La stessa sorte toccò, due anni dopo, all'unico docente non accusato di appartenere alla Carboneria, Michele Petitti, reo di aver fatto acquistare per la biblioteca del collegio opere messe all'indice (ASN, *Ministero dell'Interno*, I, fs. 859).

¹⁸ Intendente Marchese di Cammarota alla GSPI, Campobasso 14 dicembre 1821, in ASN, *CGPI*, fs. 405: «Tralascio di rappresentare a Lei la sorpresa ed il lutto che questo avvenimento ha prodotto nel pubblico. La città ne è vivamente costernata, giacché le qualità morali ed intellettuali specialmente degli individui del Collegio destituiti avevano profondamente stabilita nell'opinione, e nel cuore di tutti una stima profondissima».

la lodata Giunta altri documenti che poterono far sorgere la convinz[io]ne nell'animo de' rispettabili membri di essa. [...] Premesso tutto ciò, debbo infine sommettere alla saviezza dell'E.V., che tranne le prove nascenti dal rapporto del prelodato Vescovo a carico de' divisati professori, non mi è riuscito di raccoglierne altre, onde convincerli di aver fatto parte di Società segrete. Una sorda voce [...] circola nel pubblico, ed è, che i medesimi, eccettuat'i soli D. Biase della Vecchia, e D. Giuseppe Carozzi, che non si nominano affatto, si ascrissero non per volontà, ma per mera necessità alla così detta carboneria dopo l'epoca del 7 luglio 1820, sulla sola idea di esser conservati ne' loro impieghi. Ma quanto possa fidarsi ad una voce vaga, e priva di ogni fondamento, lo rimetto alla somma sua penetrazione. Per me son convinto, che questa istessa voce debba essere effimera, imperocché non viene affatto indicato né il luogo né il giorno positivamente in cui si ascrissero, né presso la Polizia vi esistono documenti atti a provarlo. L'istesso Prelato, che da me si è di bel nuovo interpellato su tal particolare conviene, che per effetto delle osservazioni contenute nel precedente suo rapporto la lodata Giunta avrebbe potuto benissimo ricavare degli argomenti, onde convincersi di non essere stati i medesimi realmente carbonari¹⁹.

Anche il vescovo Pasca, pentito e amareggiato per le conseguenze derivanti da quanto rapportato, nel disperato tentativo di porvi rimedio, si profuse in una smodata difesa dei docenti in oggetto: tutti ecclesiastici suoi subalterni:

A dirle il vero questo tratto della Giunta degnissima, cui Ella presiede, mi è sensibilmente funestato: dapoiché essendo la maggior parte de' detti Maestri, Ecclesiastici, e conseguentemente più vicino al mio Sacro, e paterno Ministero, il di loro male à toccato necessariam[ent].e il mio cuore, maggiormente perché avendo io caratterizzato nel mio rapporto de' 18 maggio 1821 tutti gli Ecclesiastici della mia Diocesi, e specialmente quelli della centrale di Campobasso per persone di buona morale, e condotta politica lodevole, non mi aspettavo questo trattamento pe' miei Ecclesiastici, essenzialmente per que' di Campobasso, e molto meno per l'Impiegati nel Collegio Sannitico. In questo stabilimento non ci fu mai tanta quiete, tanto ordine, tanto rispetto alla Religione, ed al nome del Re, quanto in quell'epoca di turbolenza. Gli educatori, e gli istitutori a gara si distinsero per impedire ogni accesso di persone, o di massime equivoche in quel luogo sacro destinato a formare la morale, il cuore, e lo spirito della gioventù. Posso Eccellenza francam[ent]e assicurare che quello Stabilimento non fu, che il modello d'edificazione sotto tutti gli aspetti, e che la destituzione avvenuta abbia potato una vera costernazione nel cuore di tutti i buoni, e di tutt'i Padri, i quali non facevano, che contestare in tutt'i momenti a' destituiti la loro viva riconoscenza per aver preservati i loro figli dalla peste del tempo. Che se alcuni degli Ecclesiastici in generale potevano esser attaccati d'aver dato il nome a qualche società: io nel citato rapporto assicurai con un'osservazione ben precisata cotesta degnis[sim]a Giunta, che non lo Spirto di vertigine, o di novità gli aveva a ciò indotti, ma la premura, e l'interesse insieme di custodir l'ordine pubblico, e di far argine ad una imminente anarchia, e frenesia popolare, avea forzati varj galantuomini, ed Ecclesiastici ad unirsi con l'intelligenza, e favore de' Magistrati, e così custodire con forze unite la pubblica tranquillità patentemente minacciata, e con ciò le loro sostanze, e vite particolari²⁰.

¹⁹ Intendente Marchese di Cammarota alla GSPI, Campobasso 9 febbraio 1822, in ASN, *Dicastero dell'Interno Polizia della Luogotenenza, Giunta di scrutinio del ramo amministrativo*, fs. 50.

²⁰ Rapporto, Vescovo G. Pasca, s.d. [ma dicembre 1821], in ASN, *Dicastero dell'Interno Polizia della Luogotenenza, Giunta di Scrutinio per il ramo amministrativo*, fs. 50.

Evidentemente, al Vescovo Pasca questa lunga difesa non sembrò sufficiente e, a breve distanza, fece giungere ulteriori missive alla GSPI dichiarando che, a seguito di più approfondite indagini, si poteva addirittura attribuire a quell'«unione» di cittadini il merito del mantenimento di «quell'ordine che ad onta dell'assenza dell'Intendente si mantenne in Campobasso»²¹:

Una società immaginata [*sic*] da Lucifero, e promossa da' di lui seguaci avea già presa un'aria imponente, e minaccevole nel comune di Campobasso in Agosto del 1820. Essa si avea dato il fiero nome della *Vendetta*, ed avea in mira l'anarchia, dietro la destituzione di ogni legittima autorità. Le autorità civili di allora non videro nel momento espediente migliore, che riunire un partito d'opposizione, composto delle persone più accreditate per probità, e per possidenza, onde elider l'urto colla resistenza, e salvare così da tanto flagello la patria²².

L'alto prelato, ormai apertamente impegnato nella strenua difesa in favore del personale del Sannitico per provocare un reintegro già chiesto in precedenza, discolpò completamente il prefetto sacerdote Carlozzi in quanto «jeri l'altro mi fu denunziato essersi preso un equivoco con un altro»; giustificò il docente canonico Filipponi, fuggito da Campobasso nel periodo dei moti, motivando la fuga «perché creduto del seguito dell'Intend[ent]e Zurlo [...] la carboneria diceasi, aver decretata la morte», e scagionandolo completamente dall'aver partecipato alla setta degli oppositori²³; fece rientrare il docente sacerdote De Matteis, inizialmente annotato solo come carbonaro, tra quelli che lo furono «per tranquillità pubblica» e costretto alla fuga dal capoluogo per alcuni mesi perché in opposizione alla «setta luciferina»²⁴.

In realtà, all'insaputa del vescovo, la GSPI classificava già da tempo i rapporti come non attendibili per le «stranezze accluse» e, per mettersi al riparo da possibili censure o riprovazioni, informava, nel febbraio del 1822, il ministro degli Interni delle proprie riserve sulle valutazioni ed informative ricevute, svelandone anche i retroscena:

²¹ Vescovo G. Pasca alla GSPI, Napoli (s.g.) febbraio 1822, ASN, *Dicastero dell'Interno Polizia della Luogotenenza, Giunta di Scrutinio per il ramo amministrativo*, fs. 50.

²² Rapporto, vescovo G. Pasca alla GSPI, Campobasso 8 giugno 1822, in ASN, *Dicastero dell'Interno Polizia della Luogotenenza, Giunta di Scrutinio per il ramo amministrativo*, fs. 50. Le indicazioni del vescovo sulla 'setta luciferina' trovano riscontro negli studi locali dedicati all'argomento che annoverano tra le maggiori vendite carbonare presenti nel capoluogo molisani: 'I vindicatori dell'ordine tradito', cui fa esplicito riferimento il vescovo; 'Gli illustri Sanniti' con a capo Giovanni De Maio, fervido oppositore di Biase Zurlo; e gli 'Illustri spartani' formata da militari; cfr. A. Santoriello, *Giovanni De Maio: Giacobino, massone e carbonaro*, «Il Bene Comune», VIII, n. 6, giugno 2008, pp. 73-77.

²³ Rapporto, vescovo G. Pasca alla GSPI, Boiano 4 febbraio 1822, in ASN, *Dicastero dell'Interno Polizia della Luogotenenza, Giunta di Scrutinio per il ramo amministrativo*, fs. 50. Secondo il Vescovo, il nome del docente comparve nell'elenco della vendita a propria insaputa.

²⁴ Rapporto, vescovo G. Pasca alla GSPI, Boiano (s.g.) febbraio 1822, in ASN, *Dicastero dell'Interno Polizia della Luogotenenza, Giunta di Scrutinio per il ramo amministrativo*, fs. 50.

La Giunta di Scrutinio della Pub[bli]ca Istruzione nell'esaminare la condotta morale, e politica de' Professori, e Maestri tanto del Collegio di Campobasso, che di tutta la Provincia ha avuto innanzi agli occhi i rapporti rimessi tanto dallo Intendente, che dai Vescovi rispettivi. Questo sistema si è specialmente tenuto nello scrutinio de' maestri della Diocesi di Bojano; che anzi siccome questo Vescovo fin dal dì 18 Maggio fece pervenire nella Segreteria della Giunta di Scrutinio il suo rapporto; così in prosieguo si portò personalmente nella Giunta, e disse, che avea nel primo rapporto per talune persone non esattamente riferito, ed avea bisogno averlo nelle sue mani per emendarlo. La giunta autorizzò il Segretario a permettere al rid.o Vescovo di fare quelle osservazioni, che più credesse necessarie, acciocché la verità de' fatti non venisse adombrata, di fatti così venne praticato dal rid.o Vescovo, e a suo piacere ebbe nelle mani il rapporto, che avea rimesso nella Giunta medesima. Fu quello riformato dal Vescovo e di nuovo consegnato alla Segreteria.

Accaduta la destituzione de' Professori del Collegio di Campobasso, e de' maestri primarij, e privati della Diocesi di Bojano per opera di questa Giunta, che ricavò gli elementi del suo parere dal rapporto del Vescovo, il quale è uniforme a quello dell'Intendente; costui ha presentato un secondo, o per meglio dire un terzo rapporto nelle mani del Cardinale Presidente della Giunta permanente della Pub[bli]ca Istruzione, nel quale ha formata, e scritta una apologia a tutti i professori del Collegio, ed ai maestri primari della sua Diocesi. Un tale rapporto che porta la data del dì [...] Dicembre p.p. l'Eminentissimo Cardinale lo ha fatto pervenire in questa Giunta per mezzo del Segretario Generale della Pubblica Istruzione Angelantonio Scotti. Questo nel consegnare tale rapporto, a voce disse al Segretario della Giunta di Scrutinio della Pubblica Istruzione, a nome di Sua Eminenza, che il Vescovo di Bojano avea formato un tale rapporto *ad pompam*, ma che niuna cosa avea da giungere, o togliere dal rapporto, che avea rimesso fin dal 19 del mese di Giugno nella Giunta di Scrutinio della Pubblica Istruzione.

In questo Stato di Cose crede questa Giunta che l'operato del Vescovo sia non lodevole, e che in questo modo rende nella Provincia sospetta la lealtà della quale si gloria questa Giunta. L'azione del Vescovo compromette le persone della Giunta in faccia a coloro per le quali diede il suo parere per la destituzione.

Si è creduto tutto far presente a V.E. acciocché prenda quegli espedienti, che crederà essere più analoghi a rendere la Giunta immune da qualunque imputazione, che mai gli si potrebbe fare²⁵.

Appelli, ritrattazioni e richieste delle due massime autorità nel campo civile e religioso, caddero inesorabilmente nel vuoto e la GSPI, assicurata da «S.M. [di] non darsi più ascolto ai posteriori rapporti fatti dal Vescovo, ma che si stesse al primo»²⁶, impartì all'intendente, già nel dicembre, l'ordine perentorio di attenersi al decreto 24 giugno 1821: «Gli Intendenti, coll'approvazione de' rispettivi Ordinarij diocesani, destineranno soggetti d'intelligenza, di sana moralità, ed illibata condotta per interini sostituti a tutte la cattedre de' Reali Licei e Collegi, che trovansi vacanti, o pure diverranno tali per soppressione o destituzioni de' professori e maestri»²⁷; nello stesso tempo, il Ministero

²⁵ GSPI al Ministero degli Interni, Napoli 16 febbraio 1822, in ASN, *Ministero degli Interni*, I, fs. 862.

²⁶ *Ibid.*

²⁷ CLDAP, Vol. II, p. 15.

fece riferire al vescovo di essere in futuro «più fermo e meno leggiero»²⁸ e, contestualmente, inviò a Campobasso l'ispettore generale, Dionisio Orofino, in qualità di rettore provvisorio, con il delicato compito di rimettere ordine «nell'amministrazione, nell'insegnamento e nella disciplina»²⁹.

Scrutinio e declino delle scuole secondarie

I Vescovi e l'intendente furono incaricati di stendere rapporti dettagliati anche su maestri di scuole primarie e professori delle scuole secondarie, oltreché sui docenti privati, per cui si innescò una serie di riferimenti a catena: l'alto funzionario della Provincia di Molise, con circolare del 10 e del 17 ottobre 1821, ricorse ai giudici di circondario e ai sottintendenti; questi, a loro volta, fecero riferimento ai sindaci dei comuni, i quali raccolsero informazioni su docenti pubblici e privati seguendo un questionario predisposto comprendente: condotta morale e politica, attitudine ad insegnare, generale opinione di cui godevano ed eventuali utili osservazioni.

A partire dal 1823, si attivò in Molise anche il canale informativo del commissariato di polizia, i cui rapporti sui docenti furono tenuti in gran conto dalla neonata Presidenza della Regia Università degli Studi e Giunta di Pubblica Istruzione, istituita nel settembre del 1822, che assorbì le funzioni riservate alla Giunta di scrutinio e alla Giunta permanente di Pubblica Istruzione³⁰.

È interessante, a questo punto, seguire lo scrutinio dei docenti nominati nei comuni in cui furono istituite le scuole secondarie: Riccia, Morcone, Bonefro, Baselice, Casacalenda e Trivento.

Riccia

Deceduto, nel 1820, Gabriele Antonelli, titolare della cattedra di Grammatica latina, l'intendente, nel suo rapporto del 1821 alla Giunta, caldeggiò Alessandro De Simone, titolare di Belle lettere, per «la sua condotta politica irreprensibile» nonostante che «dopo l'epoca di luglio scorso si fosse fatto indurre a cadere

²⁸ Minuta, Ministero degli Interni alla GSPI, s.d., in ASN, *Ministero degli Interni*, I, fs. 862.

²⁹ ASN, CGPI, fs. 405.

³⁰ La Giunta Permanente di Pubblica Istruzione, istituita il 31 ottobre del 1821, doveva assolvere le funzioni di carattere generale della pubblica istruzione, tra cui revisionare e licenziare i testi, in modo da consentire alla Giunta di scrutinio per la P.I. di concentrarsi esclusivamente sulla inquisizione del personale. Le due Giunte furono sciolte a seguito del R.D. 12 settembre 1822 istituyente la 'Presidenza della Regia Università degli Studi e Giunta di Pubblica Istruzione' (cfr. CLDAPI, Vol. II, pp. 109-111).

nella così detta setta de' carbonari a motivo che come forestiero non fosse invisito da paesani» e aggiungeva: «In quanto alla morale è degno di elogio: dacché nell'istruzione dei suoi giovanetti personalmente la mattina li accompagna in Chiesa a assistere alla Santa Messa, e nella sera all'esposizione del sacramento»³¹. Pertanto, De Simone continuò la sua attività didattica nonostante la cauta denuncia di carboneria, ma, tre anni dopo, fu destituito per l'accusa di pedofilia mossagli dal padre di uno dei suoi allievi: il giudice regio avvertì l'intendente che a sua volta comunicò l'apertura del procedimento giudiziario al ministero, il quale diede ordine al Presidente della Giunta di sospenderlo immediatamente dalle sue funzioni e il Consiglio di Stato, nella seduta del 6 ottobre 1824, ne decretò la destituzione³².

Morcone

Giambattista Torti, già docente del collegio Sannitico, non risultando tra i carbonari nel 1821 poté insegnare indisturbato fino al 1827, anno in cui l'intendente, raccolta una denuncia di carboneria, doverosamente chiese informazioni più accorte al parroco, che si espresse in questi termini:

Fu il primo che in luglio dello stesso anno [1820], portò qui la notizia di essersi pubblicata la Costituzione [...]. È troppo noto che il Torti fu il promotore della rivolta di Busso contro i Baranellesi ed armato di tutto punto, dirigeva i rivoltosi che commisero violenze specialmente verso i pastori e animali di Baranello che trovansi sul monte Vairano. Prima di stabilirsi in Morcone era maestro di Belle lettere nel Collegio Sannitico e tutti i dati mi portarono a credere che sia stato carbonaro, ma non si diede a conoscere per riscaldato. Sono ignoti i mezzi da lui trovati onde essere traslocato da quella cattedra all'altra di Morcone³³.

A nulla valsero le sue discolpe e le accuse che Torti ritorse contro il parroco, ritenuto il vero settario, dal momento che le successive indagini di polizia confermarono la denuncia, cosicché il docente fu destituito nell'aprile del 1828³⁴. La scuola, nonostante la destituzione, continuò la sua attività con la nomina provvisoria del medico Pasquale Capozzi, di Morcone, voluto dal decurionato e approvato dall'intendente dopo l'*imprimatur* del cardinale di Benevento, ma

³¹ Intendente Marchese di Cammarota alla GSPI, Campobasso 18 agosto 1821, in ASN, CGPI, f. 1488. Il rapporto del sindaco all'intendente, del 25 ottobre 1821, confermava le qualità del docente: «adempie al proprio dovere, di buona morale, religioso, attaccato al sovrano» (in ASCb, *Intendenza di Molise*, b. 991, f. 85).

³² ASN, CGPI, fs. 1488.

³³ Sulle sorti di G. Torti dà notizia: A. Zazo, *Sette nel Molise e disavventura di un insegnante molisano*, in «Samnium», n. 3-4, 1974, pp. 257-258.

³⁴ *Ibid*, p. 257.

il docente dovette accontentarsi di soli 6 ducati mensili, metà dello stipendio percepito dal suo predecessore, decurtati ancora della metà l'anno seguente³⁵.

Bonefro

Il sacerdote Bernardo Santojanni fu indicato come Gran Maestro di vendita carbonaria dall'ordinario diocesano di Larino, il vescovo Raffaele Lupoli:

Egli è uno degli antichi carbonari, e gran maestro delle vendite di Bonefro, e molti de' suoi scolari furono indotti da lui a servire al fornello. Ben vero, però, che chiamato da me, e corretto si mostrò pronto a rinunziare alle dignità, e mi assicurò d'averlo fatto inseguito, anche con pericolo della sua vita. Pel costume poi ho dovuto rimuovere da esso la facoltà di confessare³⁶.

A questo rapporto di natura politica, veniva allegata una informativa di ordine morale contenente pesanti accuse di sfrenato libertinaggio sottoscritte dal parroco di Bonefro:

Continua questo indegno sacerdote le sue debosciatezze. È uno scandalo generale vederlo amoreggiare con quattro, o cinque donne sue predilette, ed antiche penitenti, facendo colle medesime come un frenetico, ed i miei occhi col massimo rincrescimento, e dolore, quasi giornalmente ne sono offesi, anche dentro il Santuario.

Un sacerdote immorale cotanto, e che nelle passate diaboliche rivoluzioni figurava da Gran Maestro nella Carboneria, vedesi con generale ammirazione de buoni continuare nell'esercizio della scuola secondaria che è qui istallata: che bella educazione morale, che belle massime politiche suole questo ottimo Istruttore comunicare ai suoi giovanetti scolari!³⁷

La Giunta, a sua volta, annotava in calce al rapporto del parroco: «mandata dal vescovo di Larino che l'appoggia».

Il giudice del circondario di Bonefro, al contrario, nei riguardi del Santonianni sentenziava: «Egli per la sua dottrina è l'ornamento del Clero di questo Capoluogo. Egli per i suoi rari talenti potrebbe fare la figura la più luminosa in qualunque rispettabile Liceo, Seminario, od altro luogo di educazione»³⁸.

Probabilmente, proprio grazie a queste opposte posizioni che lasciavano intendere un complesso retroscena di natura non individuabile, B. Santojanni non fu allontanato immediatamente: sciolta la Giunta di Scrutinio e la Giunta

³⁵ ASN, CGPI, fs. 1489.

³⁶ Rapporto, Vescovo Raffaele Lupoli alla GSPI, Larino 11 luglio 1821, in ASN, CGPI, fs. 1488.

³⁷ *Ibid.*

³⁸ Rapporto, Giudice circondariale F. S. Buppelli all'intendente Marchese di Cammarota, Bonefro 26 ottobre 1821, in ASCb, *Intendenza di Molise*, b. 991, f. 85.

permanente, gli atti passarono alla Presidenza della Regia Università degli Studi e Giunta di Pubblica Istruzione, che si pronunciò solo dopo aver ricevuto un conclusivo rapporto dell'intendente, acquisito nel novembre del 1823³⁹; ma passò comunque altro tempo prima che il Consiglio di Stato, in una seduta del 1824, ne decretasse la destituzione⁴⁰.

Baselice

Il sacerdote Gervasio De Mattia, incolpevole dall'accusa di esser settario, si vide costretto a difendersi dalla invettiva, mossagli dall'arciprete di Baselice, di immoralità aggravata dalla constatazione «che da due anni si è confessato una sola volta» e concludeva il quadro d'accusa con il rilievo di «far languire la scuola», ridotta ormai a pochi alunni⁴¹. Nella vicenda intervenne il fratello del De Mattia, di nome Giovanni, ispettore scolastico del circondario, che, non riconoscendo nella persona del parroco la funzione di ispettore scolastico del comune, lo accusò di aver ordito il piano per agevolare la nomina del proprio fratello a docente di scuola secondaria e per ambire egli stesso alla carica di ispettore di circondario⁴². La vicenda, nel clima politico degli anni Venti, non poteva restare relegata a livello comunale, per cui, messa in piedi la macchina investigativa, il ministero acquisì il parere dell'arcivescovo di Benevento, che nei confronti di Gervasio De Mattia espresse un vero e proprio elogio, contrastando completamente il contenuto del rapporto di polizia che affermava:

1° Essendo stato nel decennio colla stessa qualità nel Liceo di Benevento lasciò ivi di sé una pessima fama, anche quella polizia non cessa di vigilarlo allorché vi si reca; 2° passato quindi al seminario di Ariano dove stiede su qualche anno, vi si fe conoscere per un esaltato francesista; 3° ritornato in seguito in patria recò seco una donna in qualità di serva, con la quale si diceva aver egli commercio; e morta costei circa tre anni addietro, si fece venire da

³⁹ Non è stato possibile reperire il rapporto dell'intendente; nella documentazione di cui disponiamo, è presente soltanto la lettera di trasmissione del rapporto dal Ministero degli Interni alla Giunta (ASN, *CGPI*, fs. 1488). È stato rintracciato, però, il rapporto all'intendente del giudice del circondario di Bonefro, il quale, contrariamente al suo predecessore, confermava le informazioni date dal vescovo: «oltre di essere stato uno dei primi dignitari della infame setta, per aver occupata la carica di G[ran] M[aestro], ed oratore in questa vendita più anni prima delle ultime emergenze politiche; è immorale e di costumi rilasciati a pegno, che Monsignor Vescovo di q.a Diocesi è risolto nella necessità privarlo dell'esercizio di confessare» (Rapporto, Giudice circondariale P. Iantelli all'intendente, Bonefro 20 agosto 1822, in ASCb, *Intendenza di Molise*, b. 362, f. 1).

⁴⁰ ASN, *CGPI*, fs. 1488.

⁴¹ PG al Cardinale arcivescovo di Benevento Domenico Spinucci, Napoli 11 gennaio 1823, in ASN, *CGPI*, fs. 1489. Il memoriale dell'arciprete della parrocchia di Baselice, Domenico Caruso, inoltrato alla PG, risale al 20 novembre 1822 (ASN, *CGPI*, fs. 1489).

⁴² Ispettore Giovanni De Mattia alla PG, Baselice, 23 febbraio 1823, in ASN, *CGPI*, fs. 1489.

uno degli Ospizj di Napoli una fanciulla di circa anni dodici, che ora tiene in casa, e che il pubblico dice da lui procreata colla suddetta donna; 4° [...] vi è attualmente mormorazione sul comune, che tenga pratica con la moglie del suo garzone; 5° nella rivolta del 1820 essendo egli nel Collegio di Campobasso, di dove partì sulla fine di settembre per occupare la carica di Maestro nel sud[dett]o comune, fu veduto in stretta amicizia col capo della carboneria ex Giudice criminale Ferrante, che andava a trovarlo anche nel Collegio, ed una notte fu osservato tra la turba de' carbonari intervenuti intorno ad un casino di campagna, dove si faceva ricezione, dalle quali circostanze si desume, che esso D. Gervasio [...] facesse parte della Carboneria [...]»⁴³.

Il Consiglio di Stato, il 24 febbraio 1824, prestando maggiormente fede al rapporto di polizia, ratificò la destituzione del docente. Un anno dopo, però, lo stesso Consiglio ritornò sui suoi passi, riscontrando l'infondatezza delle accuse mosse dal parroco e sollecitò il Ministero degli Affari Interni ad ordinare alla Giunta di Pubblica Istruzione il reintegro del sacerdote, con l'accortezza di destinarlo «ove se ne presenti la vacanza, [...] in un comune diverso da quello di Baselice»⁴⁴. A distanza di un anno, non essendosi verificata alcuna condizione che permettesse di seguire il suggerimento, il Consiglio lo reintegrava nel comune d'origine. La situazione a Baselice, nel frattempo, risultava profondamente cambiata rispetto ai tempi della destituzione, tanto che l'intendente dovette comunicare alla Giunta le osservazioni oggettive del sindaco: con un scuola secondaria chiusa da 3 anni e con la scuola primaria riaperta da poco, mancavano ormai gli studenti in grado di seguire i corsi della secondaria, per cui si richiedeva di posticipare l'apertura dopo il 1828, allorché si sarebbe avuta la conclusione degli studi degli alunni della scuola primaria. Il ministero fece propria la proposta. Nel 1829, Gervasio De Mattia avanzò al comune la giusta pretesa di riattivare la cattedra, ma a seguito della relazione del sindaco che riconfermava l'assenza di giovani da istruire, il ministero, nell'aprile del 1829, ne prese atto soprassedendo⁴⁵.

Casacalenda

Giuseppe Mancini, colpito dall'accusa di essere «carbonaro», fu immediatamente sospeso. Il vescovo di Larino, Raffaele Lupoli, segnalava: «[...] so che sia carbonaro antico. Egli però spaccia d'esserlo dopo la bandiera. Circa il costume nel pubblico niente posso dire, perché all'esteriore non c'è male. Tutto ciò sia detto a V. Ecc.a con riserbatezza grande, perché siamo ancora nel timore». Sulla pratica la Giunta annotava: «Si spetti il rapporto

⁴³ Rapporto dell'ufficiale del reparto di polizia del Molise, Autorini, trasmesso dal Ministero degli Interni in data 4 febbraio 1824 alla PG, in ASN, CGPI, fs. 1489.

⁴⁴ Ministero degli Interni alla PG, Napoli 20 agosto 1825, in ASN, CGPI, fs. 1489.

⁴⁵ ASN, CGPI, fs. 1489.

dell'intendente»⁴⁶, il quale acquisì, nell'ottobre 1821, il parere favorevole del sindaco: «Giovine di circa anni 23. Non ha che dirsi intorno alla sua morale, la quale sembra buona; per riguardo poi all'attuale sua condotta politica, si mostra attaccato all'attuale Felicissimo Governo»⁴⁷, ma il parere non fu sufficiente a reintegrarlo.

Trivento

Il docente Stefano Trudi dimostrava possedere, secondo il vicario capitolare Antonio Lalli, un' «ottima morale, di sana religione, e ben premuroso d'istruire i suoi allievi nelle belle lettere, che egli meritamente professa; nommai tacciato d'aver dato nome fra que', che abbracciarono la Società Carbonaria»⁴⁸, e, per il sindaco, godeva di «tutta la buona opinione, essendo versatissimo nel suo mestiere»⁴⁹. Nel 1823, però, il consiglio comunale deliberò di non ristabilire più i fondi della scuola in quanto, come sintetizzava il ministero all'intendente a chiusura della pratica, «è vicina la riapertura di quel Seminario diocesano, ove i cittadini hanno il privilegio di ricevere gratuitamente l'insegnamento; e che il Consiglio d'Intendenza ha annuito ad una tale preposizione»⁵⁰.

In queste poche righe veniva sintetizzato il sostanziale cambiamento della politica scolastica avvenuta all'indomani dei moti, inaugurata dall'alto clero curialista, posto ai margini durante il quinquennio precedente, ma che riuscì a conquistare il vertice della pubblica istruzione con la nomina di un suo importante rappresentante, il cardinale arcivescovo di Napoli Luigi Ruffo di Scilla, a presidente della Giunta permanente della Pubblica Istruzione nel 1821.

L'ala curialista che lo sosteneva, uscita sconfitta dal concordato del 1818, «si proponeva di rialzare la potenza economica e morale della Chiesa del Regno, profittando delle buone disposizioni del Re e delle esigenze della Restaurazione»⁵¹

⁴⁶ Rapporto, Vescovo Raffaele Lupoli alla GSPI, Larino 21 luglio 1821, in ASN, CGPI, fs. 1488.

⁴⁷ Rapporto, sindaco D. de Sanctis al sottintendente, Casacalenda 13 novembre 1821 in ASCb, *Intendenza di Molise*, b. 991, f. 85.

⁴⁸ Rapporto, Vicario capitolare Antonio Lalli alla GSPI, Trivento 12 marzo 1822, ASN, *Dicastero dell'Interno Polizia della Luogotenenza, Giunta di scrutinio per il ramo amministrativo*, fs. 50.

⁴⁹ Sindaco G. Scarano all'intendente Marchese di Cammarota, Trivento 4 novembre 1821, in ASCb, *Intendenza di Molise*, b. 991, f. 85.

⁵⁰ Ministero dell'Interno all'intendente Marchese di Cammarota, Napoli 31 dicembre 1823, ASN, CGPI, fs. 1488.

⁵¹ W. Maturi, *Il concordato del 1818 tra la Santa Sede e lo Stato*, Firenze, Le Monnier, 1929, p. 21.

ed era intenzionata a «riplasmare la società [...], specialmente colla persuasione, con una vasta propaganda culturale, colla pubblica istruzione»⁵².

Il progetto di clericalizzazione, fatto proprio dalla neonata Presidenza della Regia Università e Giunta permanente di Pubblica istruzione (1822), si rafforzò progressivamente sotto il regno di Francesco I (1825-1830) e fece presa sull'opinione degli amministratori comunali e dei vertici provinciali.

Già nel 1822, il distretto di Isernia proponeva ed otteneva la riapertura dell'antico collegio di Frosolone con annesso convitto, affidandone le cure ai Preti della Dottrina Cristiana⁵³; e, quasi contemporaneamente, il Consiglio del distretto di Larino, procedeva nell'analogo indirizzo, come risulta chiaro dal verbale:

[Il Consiglio] si è seriamente occupato ad esaminare come [l'istruzione pubblica] progredisce nel Distretto, ed ha conosciuto che anziché progredire l'istruzione pubblica nel Distretto, va' sempre più deteriorando, anzi si è ridotta al niente. Conosce bene il Consiglio quanto interessi al bene delle popolazioni una saggia pubblica istruzione. Infelicamente, nel nostro distretto questa è stata finora trascurata, giacché non vi esiste che il solo Seminario di Larino, scampato fortunatamente dalle rovine in cui gli altri Seminari vi caddero nelle infelici passate vicende. Il Consiglio distrettuale ha però con estremo contento osservato che S. M. il Re D. G. sempre intento a beneficiare i suoi amatissimi sudditi nel Consiglio de' 8 gennaio 1822 sulle deliberazioni del Consiglio Provinciale di Molise nelle sue adunanze di Ottobre 1821 si è benignato ordinare ai Direttori delle Regali Segreterie di Stato degli Affari Ecclesiastici, e delle Finanze, che a' termini dell'articolo 17 del Concordato con i fondi ivi indicati sottoposti alle Commissioni Diocesane siano riaperti i Seminarj di Triventi, e di Termoli, e si completi la dotazione di quelli di Isernia e di Bojano. Questo Consiglio Distrettuale nel mentre, che fa conoscere al Consiglio Provinciale di porgere i suoi più vivi ringraziamenti ai piedi del proprio Clementissimo Sovrano per essersi benignato di tanto interessarsi pel bene e vantaggio di questo nostro Distretto, lo premura di insistere perché tali Sovrane determinazioni non vengano ulteriorment[e] differite a discapito della pubblica istruzione⁵⁴.

Da analoghi verbali si ricava anche il declino definitivo delle scuole secondarie. Nel 1823, il Consiglio distrettuale di Isernia, per mancanza di fondi, propose addirittura l'«abolizione [dello stipendio] dei maestri secondarj e agrarj»; proposta rigettata dal Consiglio Generale della Provincia che reclamò «la moltiplicaz[ion]e di tali scuole, almeno in ogni Capo di circondario, se fusse possibile»⁵⁵. La possibilità non ci fu, anzi la situazione rovinò nella direzione opposta a quella perseguita da Biase Zurlo mediante la riattivazione dei seminari e la moltiplicazione di scuole private volute dal ministero, col decreto

⁵² *Ibid.*, p. 23.

⁵³ Consiglio distrettuale di Isernia, seduta 17 aprile 1822, in ASCb, *Intendenza di Molise*, b. 73, f. 65.

⁵⁴ Consiglio distrettuale di Larino, seduta 19 aprile 1822, in ASCb, *Intendenza di Molise*, b. 73, f. 65.

⁵⁵ Consiglio Generale della Provincia, seduta 18 ottobre 1823, in ASCb, *Intendenza di Molise*, b. 71, f. 53.

28 gennaio 1822, che ne autorizzava l'apertura⁵⁶. Pochi mesi dopo si impartì agli ordinari diocesani la disposizione di «rimettere alla Giunta medesima un notamento de' Maestri non autorizzati, i quali debbono però essere di loro piena fiducia: che a questo notamento i Vescovi debbano unire le suppliche che gli aspiranti avanzano per di loro mezzo alla Giunta [...] e che contengano il piano dell'insegnamento che rispettivamente essi aspiranti desiderano praticare nelle loro private scuole, affinché la Giunta possa ad ognuno spedire il permesso provvisorio a poter insegnare»⁵⁷. Tale atto, con cui si delegava ai vescovi l'individuazione di personale idoneo, agevolò i docenti molisani destituiti, i quali chiesero ed ottennero l'autorizzazione ad insegnare privatamente già a partire dal 1823.

Scrutinio e declino delle scuole di agricoltura pratica

Dei 6 docenti di agricoltura pratica, soltanto 2 furono colpiti dall'accusa di carboneria, Francesco Fortini e Carlo Barbieri, ma solo il primo fu destituito a seguito di un dettagliato rapporto di polizia, nel febbraio del 1823, benché non occupasse già più la cattedra, affidata provvisoriamente a Vincenzo Iadopi sin dal marzo del 1821⁵⁸.

Anche nel caso di Barbieri i contenuti dei rapporti non furono univoci: il giudice di circondario scriveva:

Non lo assiste buona opinione nell'esercizio del di lui magistero, e non è ascoltato che da pochissimi individui che a preghiera seco conduce onde non recitare le lezioni all'aere che riempì il vuoto del locale della cattedra. I sistemi contraddittorj, i paradossi che gli sfuggono, e le incongruenze del ragionare han prodotta la non curanza delle di lui lezioni. Le massime liberali che sovente ha disseminate, rimontando dall'epoca del 1799, allorché con fatti estrinsecò l'animo deciso di fiero repubblicano, e fece fucilare assistito da altri complottati in pubblica piazza Alessio di Pasquo [...]. È stato per molti anni nella Valdellina dopoché fuggì dal Regno per non essere arrestato. Tornato qui l'ho ravvisato persistere ne' primieri liberali sentimenti; per la qual cosa pare che gli stia mal affidata l'istruzione della gioventù nel ramo di agricoltura; tanto più che nell'ottimestre delivio faceva cadere spesso in acconcio nelle lezioni delle novelle incitanti al sostegno della costituzione⁵⁹.

⁵⁶ Sugli effetti del decreto e sulla diffusione di scuole private in Molise e nel Regno si veda: Gragnaniello, *Didattica e istruzione*, cit., p. 142 e *passim*.

⁵⁷ Circolare 16 maggio 1822, in *Giornale dell'Intendenza di Molise*, anno 1822.

⁵⁸ Sulla vicenda che interessò Francesco Fortini, rimandiamo al nostro contributo *Biase Zurlo e l'istruzione secondaria in Molise (1810-1820)*, cit., in particolare alla nota n. 92. Poiché V. Iadopi non compare nella lista dei docenti di agricoltura scrutinati, è ipotizzabile che ricoprì l'incarico soltanto per un brevissimo lasso di tempo, oppure non prese mai servizio.

⁵⁹ Rapporto, giudice di circondario G. Paolantonio all'intendente Marchese di Cammarota, Agnone 19 ottobre 1821, in ASCb, *Intendenza di Molise*, b. 991, f. 85.

Diversamente, la valutazione del sindaco riferiva:

Maestro di agraria, è anche professore di medicina, di buoni costumi, pieno di cognizioni, attaccato al buon ordine, ed al Re, ed il pubblico ne ha tutta la stima⁶⁰.

e il Vicario Capitolare confermava:

Dopo aver prese le più premurose indagini, passo ad assicurare, che il Sig.r D. Carlo Barbieri, medico di Agnone non appartiene affatto alla proscritta Società Carbonaria, e che istruito dalla di lui passate vicende, mostrò attaccamento al legittimo Governo. È lodevole parimente la di lui morale condotta; poichè col fatto, e cole parole dà pruova di sua probità, e religiosa condotta⁶¹.

Nonostante tutto, le scuole continuarono sia pure stentatamente la loro attività anche dopo il trasferimento di Biase Zurlo, che le aveva volute, ma, private ormai del sostegno dell'eminente figura, le stesse andarono incontro ad ostacolanti prese di posizione all'interno dei consigli distrettuali e del Consiglio provinciale, tanto che, agli inizi degli anni Trenta, risultavano ancora aperte solo le scuole di Morcone e Casacalenda.

Tutte le riserve mentali a tale proposito, trovano emblematico accoglimento nel contenuto del verbale della seduta, del 17 aprile 1822, del distretto di Isernia:

Il Consigliere Sig.r Cremonese ha proposto di richiamarsi l'attenzione del Consiglio su un oggetto interessantissimo della agricoltura. «La cattedra di q[uest]a scienza (egli ha detto) limitandosi ad insegnare la sola teoria, senza accompagnarci le lezioni di pratica, rende inutile la sua bella istruzione. A questo male accorrer bisogna con pronto rimedio». Su questa proposizione il Consiglio ha riflettuto naturalmente, che l'istituzione della cattedra di agricoltura pratica, stabilita da varj anni in diverse comuni di q[uest]o Distretto, è stata presso che inutile, per non essersi adempito da Cattedratici al fine della legge, cioè di erudire praticamente gli agricoltori delle rispettive comuni, mentre si limitano solamente a dettar precetti nella scuola, ove spesso non vi è chi li ascolta. Il Consiglio, trovando vero, e giusto og[ge]tto, che si è proposto, all'unanimità delibera di proporsi al Consiglio Provinciale i seguenti mezzi, onde ottenere, che i Cattedratici di agricoltura uniscano alla teoria anche la pratica.

1° - Che essi sian obbligati di dare dieci giorni di lezione pratica per ciascuna coltura nelle stagioni proprie in campagna, ove saranno invitati i cittadini agricoli del rispettivi comune.

2° - Che ogni cattedratico di agricoltura sia tenuto a far intervenire da varie contrade della Prov[inci]a, e delle Provincie limitrofe, a sue spese, nel proprio comune, un agricoltore ben istruito, il quale sotto la sua direzione eseguisse quelle operazioni, che son necessarie a quella coltura, di cui si tratta nella stagione, che è propria ed opportuna per la medesima.

⁶⁰ Rapporto, Sindaco P. Cremonese all'intendente Marchese di Cammarota, Agnone 19 ottobre 1821, in ASCb, *Intendenza di Molise*, b. 991, f. 85.

⁶¹ Rapporto, vicario capitolare A. Lalli all'intendente Marchese di Cammarota, Trivento 16 dicembre 1822, in ASCb, *Intendenza di Molise*, b. 990, f. 84.

3° - Che tal sistema si replichi per tanti anni, fino a che gli stessi cattedratici sian nel caso di poterlo essi medesimi farlo osservare, ed eseguire ai cittadini, agricoltori de' proprj comuni.

4° - che per aversi un regolamento stabile, rimangono fissati 10 giorni di lezione pratica in campagna per la preparazioni di terreni seminatorj, e semina di essi – 10 giorni per le diverse piantagioni, puta e coltura delle viti – 10 giorni per la piantagione, e puta degli olivi – 10 giorni per i varj innesti, compresi quelli delle viti – e 10 giorni finalm[en]te per i varj altri oggetti a scelta del Cattedratico.

Essendo la cattedra di agricoltura una cattedra vitalizia, non si reca gran danno ai Sig. ri Maestri, se per pochi anni soffrono qualche diminuzione della pensione, stabilita col miglioramento dell'agricoltura, e coll'ammaestramento di essi medesimi nella parte pratica. Si eviterà così la perdita di tempo, che si farebbe da loro med[esi]mi nel dettare sterili precetti, senza profitto di chi li ascolta, e con interesse dalle casse comunali, senza oggetto⁶².

L'attenzione alla pratica contadina, che pur aveva costituito il nucleo della programmazione di Biase Zurlo, si trasformò in un esplicito ricatto nei confronti dei docenti. In realtà, al di là dei limiti didattici riscontrati, il mancato decollo delle scuole di agricoltura ebbe nessi causali strettamente correlati con il diffuso contesto economico caratterizzato da stagnazione e con la politica finanziaria e fiscale del ministro Luigi de Medici che, scaricando i costi dello Stato – come ha rilevato Ostuni – «sugli anelli più deboli della catena ed anche sulla proprietà terriera», non favorì investimenti privati nel settore agricolo, contribuendo al tracollo di quei piccoli proprietari che avevano beneficiato della spartizione delle terre demaniali⁶³, compromettendo seriamente l'auspicata possibilità di stabilire un rapporto interattivo tra istruzione, formazione professionale e sviluppo agricolo.

⁶² Consiglio distrettuale di Isernia, seduta 17 aprile 1822, in ASCb, *Intendenza di Molise*, b. 73, f. 65.

⁶³ Sulla politica finanziaria ed la struttura economica del meridione durante il quarantennio borbonico si veda: N. Ostuni, *Finanza ed economia nel Regno delle due Sicilie*, Napoli, Liguori, 1992.

Historia de las disciplinas, profesionalización docente y formación de profesores: el caso español*

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History of school subjects, the professionalization of teachers and teacher training: the case of Spain

ABSTRACT: This text tries to analyze, through a Spanish case, the relationships existing among the history of school subjects (and, inside it, the history of textbooks), the process of the professionalization of teaching and teachers' training. First, the causes explaining the legal absence, in Spain, of the history of school subjects in teachers' training, as well as some isolated initiatives on this theme are presented. Then, some aspects and issues are dealt with, in order to justify the presence of the history of school subjects in teachers' training, especially the need to include the analysis of textbooks in the wider field of such history. Finally, some key concepts and ideas with the aim of shaping the history of the school subjects are also presented.

TEE/EET KEYWORDS: Curriculum Subjects; Textbook; Teacher Education; Teaching Profession; Teacher Role; Spain; XX Century.

A diferencia de lo que acaece en Francia donde dos órdenes ministeriales de 28 de diciembre de 2009 introdujeron la historia de las disciplinas escolares en las pruebas de los concursos de acceso al profesorado de educación secundaria; donde, bajo el patrocinio del Service d'Histoire de l'Éducation, se han promovido y promueven seminarios y encuentros sobre el tema; y donde

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el desarrollo de la historia de la enseñanza de cada disciplina o materia ha tenido lugar a demanda o presión de los docentes de las mismas¹, en el caso de España no puede decirse que la historia de las disciplinas, en un sentido general, o de la enseñanza de determinadas disciplinas concretas – es decir, de la didáctica de las mismas –, forme parte, desde un punto de vista legal, de la formación inicial o en ejercicio de los profesores, o que su desarrollo, salvo excepciones, se haya producido a causa de la presión o demanda de quienes las imparten. En lo que a la formación inicial se refiere, no existe en la normativa vigente materia o asignatura alguna de este tipo en la titulación del grado que habilita para el acceso a docencia, tanto en el caso de los docentes de educación infantil o primaria como en el de los de educación secundaria. Tampoco la hay en el máster psico-pedagógico, teórico y práctico, que se exige para poder presentarse a los concursos de acceso al profesorado de educación secundaria. Por lo que respecta a la formación oficial en ejercicio, en manos desde 1983 de los Centros de Profesores y Recursos, la presencia de cursos, seminarios o actividades sobre la historia de las disciplinas ha sido algo muy excepcional, por no decir inexistente.

Eso no quiere decir, por supuesto, que no existan posibilidades dentro del actual marco legal, propuestas o incluso alguna iniciativa o experiencia en relación con la introducción de la historia de las disciplinas en la formación de profesores.

Causas explicativas de dicha ausencia legal

Las causas explicativas de esta ausencia son varias y todas ellas se apoyan y refuerzan. Desde un punto de vista tanto individual como corporativo, la memoria histórica de la educación entre los profesores no suele ir más allá del momento en que accedieron como tales al sistema educativo o, en todo caso, de aquella época o tiempo que recuerdan como alumnos. Su memoria como profesores se limita, además, al campo o área disciplinar a que pertenecen y al nivel educativo en el que ejercen la docencia. En síntesis, los docentes, como cualquier otro grupo profesional, tienden a considerar: (a) que la historia de la educación comienza con su experiencia – memoria – personal y profesional de la misma y que antes de dicha experiencia sólo existe un magma más o menos confuso e invariable; (b) que dicha historia se centra o gira en torno a su campo disciplinar y el nivel educativo al que pertenecen; y (c) que cualquier tiempo

¹ P. Caspard, *Introduction*, «Histoire de l'Éducation» (Número monográfico sobre historia de las disciplinas escolares), n. 38, 1988, pp. 3-6, en particular p. 3; D. Julia, *La construcción de las disciplinas escolares en Europa*, in J. Ruiz Berrio (ed.), *La cultura escolar en Europa. Tendencias históricas emergentes*, Madrid, Biblioteca Nueva, 2000, pp. 45-78, en particular p. 45.

pasado – en especial aquél en el que cursaron sus estudios u otro tiempo mítico no concretado – fue mejor que el actual en lo que a la educación se refiere. Su memoria de la educación – una memoria limitada no sólo en el tiempo sino también en el espacio académico – es una combinación de memoria personal – por tanto generacional – y corporativo-profesional. Hacen de la memoria historia, que es algo diferente, y de su entorno disciplinar y académico un mundo cerrado a otros, incluso a los más cercanos. No advierten, salvo excepciones, que la configuración actual de su nivel o modalidad de enseñanza y de su campo disciplinar, aquél que les proporciona su identidad como profesores, es el resultado de un proceso, de una construcción social y cultural cuya larga duración excede de su temporal y profesionalmente limitada experiencia personal. Como tampoco advierten, por lo general, que existen fuertes similitudes, y algunas diferencias, entre los procesos de disciplinarización o asignaturización de cada una de las materias, actividades o áreas disciplinares. Es decir, que dichas materias y áreas forman parte de un sistema educativo que genera su propia cultura y subculturas, dentro del cual se producen una serie de procesos y actúan una serie de fuerzas internas y tendencias, de índole general, que condicionan la configuración actual – una combinación de continuidades y cambios – tanto del nivel educativo como del campo disciplinar en el que ejercen la docencia. Y que, por tanto, es posible llevar a cabo un análisis general de los distintos procesos de disciplinarización que vaya más allá del nivel o campo que les define como profesores².

Una segunda causa, relacionada con la anterior, reside en la concepción que usualmente se tiene de la historia como un campo inagotable de curiosidades y anécdotas, como un lugar de citas y referencias, de cosas (acontecimientos, personajes, etc.) que conmemorar u olvidar. La historia como un cúmulo de procesos de larga duración, de genealogías, de capas superpuestas y palimpsestos, la historia como ciencia, es algo normalmente ajeno a la mentalidad de las gentes. Si resulta, además, que más que ofrecer recetas, respuestas y soluciones prácticas de aplicación inmediata a los problemas cotidianos del profesor en el aula, lo que la historia de las disciplinas ofrece son preguntas y planteamientos que obligan a reflexionar, a pensar, y que socavan los cimientos del relativo saber-poder en que se asienta la labor docente en un área o campo determinado,

² A. Viñao, *Sistemas educativos, culturas escolares y reformas. Continuidades y cambios*, Madrid, Morata, 2002; trad. al portugués *Sistemas educativos, culturas escolares e reformas*, Mangualde, Edições Pedagogo, Lda., 2007; Id., *El libro de texto y las disciplinas escolares. Una mirada a sus orígenes*, in A. Escolano Benito (ed.), *Currículo editado y sociedad del conocimiento. Texto, multimedialidad y cultura de la escuela*, Valencia, Tirant lo Blanch, 2006, pp. 109-140; Id., *Historia de las disciplinas escolares*, «Historia de la Educación», n. 25, 2006, pp. 243-269; trad. al portugués y publicado en «Revista Brasileira de História da Educação», n. 18, 2008, pp. 173-215; Id., *La historia de las disciplinas escolares en España: una revisión con especial atención a la educación secundaria*, in L. López-Ocón, S. Aragón, M. Pedraza (edd.), *Aulas con memoria. Ciencia, educación y patrimonio en los institutos históricos de Madrid (1837-1936)*, Madrid, CEIMES-CSIS-Comunidad de Madrid, 2012, pp. 265-277.

al mostrar lo que de construcción social hay en el mismo y en la docencia como profesión, nada tiene de extraño que los profesores rechacen sus planteamientos o análisis. No hay grupo corporativo o profesional que soporte psicoanalizarse como tal grupo desvelando los oscuros, humildes o conflictivos orígenes de los que proceden sus saberes-poderes, o mostrando cómo, en el fondo, dichos saberes y poderes se asientan sobre una determinada combinación histórica de grandes ideales, más o menos retóricos, e intereses individuales y corporativos. Cuando el pasado, como es usual, no resulta complaciente mejor es ignorarlo creando todo tipo de leyendas y mitos sobre el mismo, o modificarlo a nuestro gusto y antojo.

Una tercera causa, consecuencia de las anteriores, se halla en el escaso desarrollo de la investigación sobre la historia de las disciplinas. Si no se investiga sobre un tema, eso quiere decir que dicho tema no se considera relevante y que no interesa. Y si no se investiga sobre el mismo, mal puede pensarse que su presencia en la formación de profesores sea necesaria. Entre otras razones, porque se desconoce la existencia de este campo de investigación, así como lo que puede aportar al conocimiento y a la reflexión sobre la docencia como profesión. El cuadro que a continuación se incluye, muestra la presencia en España, en porcentajes, de artículos de historia de las disciplinas en las principales revistas de Historia de la Educación, Historia de la Ciencia, Didáctica general y Didácticas específicas desde el año 2000 al 2009, ambos inclusive.

Presencia de la historia de las disciplinas en diversas revistas (% de artículos sobre el total en el período 2000-2009)

<i>Con-Ciencia Social</i> . Revista del grupo Fedicaria	48.72
<i>Llull</i> . Revista de la Sociedad Española de Historia de las Ciencias y de la Técnica	18.95
<i>Historia de la Educación</i> . Revista de la Sociedad Española de Historia de la Educación	15.40
<i>Didáctica de las Ciencias Experimentales y Sociales</i>	10.81
<i>Iber</i> . Didáctica de las Ciencias Sociales	5.31
<i>Enseñanza de las Ciencias</i> . Revista de Investigación y Experiencias Didácticas	4.17
<i>Suma</i> . Revista sobre el aprendizaje y la enseñanza de las Matemáticas	1.88
<i>Eufonía</i> . Didáctica de la Música	1.79
<i>Profesorado</i> . Revista de Currículum y Formación de Profesorado	1.76
<i>Alambique</i> . Didáctica de las Ciencias Experimentales	1.53
<i>Tándem</i> . Didáctica de la Educación Física	1.09
<i>Uno</i> . Didáctica de las Matemáticas	0.77
<i>Textos</i> . Didáctica de la Lengua y la Literatura	0.67

Que la revista «Con-Ciencia Social» del grupo Fedicaria, dedicada a la Didáctica de las Ciencias Sociales – geografía e historia preferentemente –

alcance un porcentaje tan elevado (48.72 %) no debe extrañar si se tiene en cuenta: (a) el bajo número de artículos por número (entre 3 y 6), y el hecho de que en cada uno de ellos se incluye un análisis bioprofesional de un profesor y una entrevista con el mismo, lo que por sí solo supone ya, al menos, dos textos sobre el tema que nos ocupa; y (b) que es en el grupo Fedicaria – en especial, aunque no sólo, en el subgrupo Nebraska que forma parte del mismo – donde más desarrollo teórico, conceptual y productivo ha tenido la historia de las disciplinas escolares en España³.

Los porcentajes de «Llull» (18.95 %) e «Historia de la Educación» (15.40 %) son lo menos que cabe esperar de dos revistas dedicadas, respectivamente, a la historia de la ciencia y a la de la educación. Las cifras de las revistas de las didácticas específicas – o de didáctica general como «Profesorado» –, contrastan con las hasta ahora indicadas. Por lo general no superan el 2 por ciento y, cuando lo hacen, es porque la mayor parte de los artículos sobre el tema (5 de un total de 8 en «Didáctica de las Ciencias Experimentales y Sociales») están escritos por miembros del grupo Fedicaria; porque, en el caso de Iber, hay dos números monográficos de índole bioprofesional (los dedicados a dos historiadores tan relevantes como Pierre Vilar y Antonio Domínguez Ortiz); o porque, como sucede en «Enseñanza de las Ciencias», se trata de trabajos sobre historia de los manuales escolares o de historia de la ciencia con estrechas relaciones con su enseñanza.

Quede asimismo, como hecho a destacar, que ninguna de las revistas indicadas – ni siquiera «Llull» o «Historia de la Educación» – ha publicado un número monográfico sobre la historia de las disciplinas escolares a lo largo de los nueve años consultados, ni en alguno de los números anteriores. Un análisis de los monográficos y de los títulos de los trabajos incluidos en las revistas de didácticas específicas nos muestra una serie de intereses o temas comunes o recurrentes en todas ellas – atención a la diversidad, competencias a desarrollar en los alumnos, recursos didácticos, materiales curriculares, nuevas tecnologías, formación de profesores, procesos de enseñanza y aprendizaje, estrategias de actuación en el aula, experiencias, actividades e innovaciones, leyes o reformas en curso... – entre los que no se halla la historia o socio-génesis de la enseñanza de la disciplina o campo disciplinar en cuestión; es decir, cómo nació y cómo ha llegado a configurarse la disciplina o campo en el que se trabaja⁴. Esta es una cuestión que ni interesa ni preocupa, salvo cuando se refiere a la evolución

³ Sobre el grupo Fedicaria y, en el seno del mismo, del proyecto Nebraska, véanse los respectivos sitios: <<http://www.fedicaria.org>> y <<http://nebraskaria.es/>> (última conexión: 9 de octubre 2012).

⁴ Un caso paradigmático sería el de la revista «Suma» de didáctica de las matemáticas. En su página web se ofrece una clasificación de los artículos publicados en la misma agrupados en 27 epígrafes o temas entre los que no aparece la historia de la enseñanza de las matemáticas, es decir la historia del campo disciplinar que constituye el objeto de la revista. Los escasos artículos aparecidos sobre el tema (9 entre 480 del año 2000 al 2009) se incluyen en el epígrafe «Historia de las matemáticas».

reciente de dicha disciplina o campo, y nunca, desde luego, yendo más allá de la memoria profesional de quienes escriben, o utilizando un marco teórico-conceptual adecuado que sitúe dicha evolución en el tiempo y en el espacio social y académico correspondiente. En síntesis, como ya se ha señalado, la visión temporal del campo profesional en el que se insertan dichos trabajos se limita, como mucho, a la vida profesional de sus autores, y su visión socio-espacial, como también es habitual, se circunscribe al espacio acotado de su disciplina.

Por último, formación, docencia e investigación se refuerzan. No se investiga, como acaba de verse, sobre aquello que no se considera relevante en la formación de profesores. Y tampoco se forma en aquello que no se considera digno de ser enseñado o investigado. Estamos ante un círculo vicioso que la misma historia de las disciplinas ilustra y aclara. Al fin y al cabo se trata de configurar un nuevo campo disciplinar, el de la historia de las disciplinas, que entra en conflicto con los ya existentes en la formación de profesores y que si ha de ocupar un espacio en los grados o másteres de formación de profesores tiene que ser a costa de los créditos o tiempo de formación dedicado a otras materias o disciplinas, a otros campos con sus correspondientes protagonistas e intereses corporativos e individuales. El problema, uno de los problemas, de la historia de las disciplinas es que se trata de un campo interdisciplinar. Un campo en el que necesariamente tienen que trabajar y colaborar investigadores y formadores que proceden y forman parte de diversos campos disciplinares ya constituidos, cuyos colegas ven la historia de las disciplinas como un nuevo campo competidor a la hora de ocupar el espacio académico, necesariamente limitado, de la formación de profesores. Ello explica que, como se verá, los ejemplos que en España pueden ponerse en relación con la introducción de la historia de las disciplinas en la formación de profesores hayan tenido su origen en iniciativas dispersas y locales llevadas a cabo por quienes se interesan por estos temas, y que su continuidad en el tiempo e importancia cuantitativa – medida por el número de horas o créditos que se le dedican – esté ligada a la presencia de dichos profesores, y a su peso o relevancia en las instituciones responsables de dicha formación. En síntesis, la presencia de la historia de las disciplinas en la formación de profesores depende de la existencia o no, en una institución formativa determinada, de una persona o un grupo de personas que investigan en el campo de la historia de las disciplinas y de su grado de influencia e importancia en dicha institución.

La historia de las disciplinas y la formación de profesores en España: algunas iniciativas aisladas

La ausencia de un mandato legal, por así decirlo, en relación con la introducción o presencia en España de la historia de las disciplinas en la formación de profesores no significa que no existan o hayan existido iniciativas aisladas en tal sentido. Como no podía ser de otro modo, dichas iniciativas proceden de quienes, desde diferentes campos disciplinares – Historia de la Ciencia, Historia de la Educación, Didácticas específicas – han investigado o investigan en el ámbito de la historia de las disciplinas. Además, confirmando lo anterior, dicha presencia está en función, depende, no sólo de que en una institución docente determinada y en un determinado momento haya quien o quienes investiguen en este campo, sino también de la capacidad de dichas personas, por su poder e influencia en las referidas instituciones y por las posibilidades que el marco legal establece, de introducir y hacerse cargo de la enseñanza y formación en el ámbito de la historia de las disciplinas.

Así, los casos de los que se ha podido reunir información se refieren a las universidades de Murcia – Licenciatura de Pedagogía y Máster de Secundaria –, Oviedo – Licenciatura de Pedagogía –, Salamanca – Diplomatura de Maestro de Primaria, Máster de Secundaria, Curso de Posgrado de Didáctica de Historia, Geografía y otras Ciencias Sociales –, Santander – Grado de Maestro de Primaria, Máster de Secundaria –, Universidad Nacional de Educación a Distancia – Máster de Innovación e Investigación en Educación – y Valencia – Máster de Historia de la Ciencia y de la Comunicación Científica –. Dicho esto, conviene advertir que:

- En algunos casos – diplomaturas y licenciaturas – se trata de titulaciones a extinguir sin que en los nuevos grados, que vienen a sustituirlas, figure la historia del campo disciplinar o de las disciplinas entre las asignaturas a impartir, siquiera como un tema o parte de las mismas.
- Hay amplias diferencias en lo que significa la presencia de la historia de las disciplinas en función de quienes se hacen cargo de ella y de los destinatarios: (a) en unos casos se ofrece una perspectiva general sobre este campo de investigación; (b) en otros la formación se centra en una disciplina concreta como, por ejemplo, la Didáctica de las Matemáticas o la de la Geografía e Historia; (c) en otros, se liga al estudio de la cultura material de la enseñanza científica y a la conservación del patrimonio científico-educativo; (d) en otros, por último, su estudio se plantea junto con el de la cultura escolar y de los libros de texto en relación con los procesos de innovación educativa, o con enfoques genealógico-disciplinares ligados al pensamiento histórico del presente.
- Dentro del reducido el número de horas o créditos dedicados al tema en todos los casos, existen asimismo notables diferencias en este punto entre ellos.

En relación, pues, con el nuevo máster para los futuros profesores de educación secundaria, aquellos casos conocidos en los que, siquiera de un modo testimonial o mínimo, se incluyen cuestiones relativas al ámbito de la historia de las disciplinas, todo indican que dicha presencia se produce en aquellas pocas universidades en las que existen profesores que investigan en dicho campo. Un análisis más general podría hacerse a través de los libros y materiales que se están comenzando a editar para dicho máster. Un buen ejemplo, de una editorial muy conocida en el ámbito de la pedagogía – la editoria Graó de Barcelona – sería su nueva colección “Formación del profesorado. Educación Secundaria” cuyos libros, hasta un total de 49, han aparecido a comienzos del curso 2010-11. En algunos campos disciplinares (Biología y Geología, Física y Química) se intenta relacionar, siquiera de un modo sumario, la historia del campo científico correspondiente con el de su enseñanza. En otros (Dibujo, Educación Física, Geografía e Historia, Inglés) se incluye un capítulo sobre la historia de su enseñanza, que, por lo general, intenta conectar su pasado con la situación actual o más reciente que es lo que realmente interesa. En otros (Filosofía, Francés, Lengua Castellana y Literatura, Lengua Catalana y Literatura, Matemáticas, Música, Tecnología, Orientación Educativa), por último, no se hace referencia alguna al tema.

Aspectos y cuestiones en los que fundamentar y plantear la presencia de la historia de las disciplinas en la formación de profesores

Toda introducción en los planes de estudio de una materia o tema novedoso requiere el apoyo de una serie de argumentos acerca de su utilidad y objetivos y, por supuesto, una estrategia dirigida a tal fin. En este sentido, las líneas que siguen pretenden mostrar algunos de aspectos, temas o cuestiones en los que fundamentar y apoyar la presencia de la historia de las disciplinas en la formación de profesores.

Junto a la categoría o cuerpo al que se pertenece y la institución en la que se presta servicios, los dos principales aspectos que definen la identidad de los profesores son el nivel o modalidad educativa en la que se imparte la docencia y la disciplina o campo disciplinar al que se está adscrito. Tanto uno como otro aspecto nos remiten al proceso de profesionalización docente, a las culturas escolares y académicas – tradiciones, rituales, rutinas, modos de hacer de pensar, de manejar el aula y de enseñar, sedimentados a lo largo del tiempo y transmitidos de una generación a otra de profesores – y, en relación con ellos, a la historia de las disciplinas o actividades escolares, ya se trate de las matemáticas o de la historia en la educación secundaria, la ortografía, el dictado o el cálculo en la educación primaria, o el derecho penal en la enseñanza universitaria. No es posible entender el proceso de profesionalización docente – mostrar cómo se

han formado en el tiempo las identidades profesionales en el mundo escolar –, o el de configuración de las culturas escolares, sin hacer referencia a los procesos de disciplinarización y academización de determinadas actividades o materias. La historia de la profesión docente y de las culturas escolares nos remite a la historia de las disciplinas y ésta, a su vez, a ambas.

Por otra parte, el auge en las últimas décadas del estudio de la cultura material de las instituciones educativas y de la enseñanza como actividad, así como del museísmo pedagógico y de la salvaguarda, conservación y estudio del patrimonio histórico-educativo⁵, ha abierto asimismo nuevas posibilidades a la historia de las disciplinas, actividades o materias, en especial, aunque no sólo, en relación en el ámbito científico-experimental. Durante la última década han proliferado en España los grupos y proyectos de investigación, encuentros, publicaciones y coloquios sobre la catalogación, conservación y estudio del patrimonio histórico-educativo. La confluencia, en este punto, con los historiadores de la ciencia y con el amplio movimiento a favor de la recuperación y catalogación del material científico de física, química y ciencias naturales sobre todo, aunque no sólo, de los Institutos de Educación Secundaria llamados «históricos» – los creados a mediados del siglo XIX – ha hecho posible en España que este interés conservacionista e histórico se haya ampliado a otros elementos de la cultura escolar tales como los cuadernos, los trabajos de los alumnos, los exámenes, el mobiliario, los espacios escolares, los grabados y fotografías y, de un modo general, el material didáctico de todo tipo y de cualquier otro campo disciplinar o actividad.

Más allá del uso nostálgico, del mero anticuariado o del fetichismo de los objetos utilizados en las instituciones educativas o producto de la cultura escolar, el análisis histórico de los mismos sólo cobra sentido en el marco de la historia de las disciplinas y actividades escolares. De ahí la confluencia, en este punto, de los historiadores de la ciencia con los de la educación en general y, más en concreto, de las didácticas específicas. Aspectos tales como la producción, comercialización y usos escolares de dichos objetos – entre ellos los manuales escolares – nos remiten de inmediato a la historia de determinadas disciplinas o actividades, y viceversa. Si, además, resulta que dichos objetos, y su historia, pueden ser utilizados actualmente – como de hecho está sucediendo en algún caso – como un recurso didáctico en la formación de profesores o en determinadas materias de diferentes niveles educativos, miel sobre hojuelas⁶. Este es el mejor modo de demostrar su utilidad académica.

⁵ Un buen ejemplo de este auge es la creación en el año 2003 de la Sociedad Española para el Estudio del Patrimonio Histórico-Educativo (SEPHE): <<http://www.institucional.us.es/paginasephe>> (última conexión: 9 de octubre 2012).

⁶ Miel sobre hojuelas: dicese, en el habla popular española, de las cosas buenas que se ven favorecidas por otras aun mejores.

Historia de las disciplinas y manualística escolar

El interés académico y científico por los manuales escolares ha constituido y constituye en España – y fuera de ella – otra vía de promoción y apoyo al estudio de la historia de las disciplinas escolares, así como un campo privilegiado por los investigadores de dicha historia. La razón es obvia: dejando a un lado el fácil acceso a los mismos, los libros de texto han desempeñado – y siguen desempeñando – un papel clave en la fijación de los contenidos del código disciplinar de cada materia. Es en ellos donde se halla, junto a otros aspectos, el núcleo base, los contenidos y enfoques fundamentales, de cualquier materia o disciplina. Hay, sin embargo, aspectos de su historia – en especial los relativos al libro de texto como producto comercial o a su regulación como tal producto – que sólo guardan, cuando la tienen, una relación indirecta o débil con la historia de las disciplinas o materias. No sucede lo mismo a la inversa: todos los aspectos de la historia de las disciplinas conciernen, en mayor o menor medida, a la de los libros de texto. Asimismo, como ya señaló Julia⁷, conviene prevenirse contra la idea de que la historia de una disciplina se reduce, en cuanto al análisis de sus contenidos, a la de los manuales utilizados en su enseñanza. O al contrario, añadimos, contra la idea de que es posible hacer la historia de una disciplina sin analizar sus libros de texto y el material empleado en su enseñanza. De un modo u otro, existe una relación estrecha entre ambas, aunque no igualitaria. Aun manteniendo, como campos de investigación, una relativa autonomía, la historia, el análisis de los libros de texto y del material de enseñanza como productos pedagógicos y culturales sólo adquiere un sentido histórico pleno cuando se inserta en el ámbito, más amplio, de la historia de las disciplinas.

Las consideraciones anteriores vienen a cuento de uno de los rasgos que, como se ha dicho, caracterizan la historiografía española sobre las disciplinas escolares: su desarrollo en los últimos años ha tenido lugar en buena parte dentro y a partir de los estudios sobre la historia de los manuales escolares. Por decirlo de un modo más claro: en más de un caso se ha llegado a la historia de las disciplinas – de una disciplina – desde la historia de sus manuales y libros de texto y no a la inversa. Basta hojear los índices de los libros publicados dentro o en la órbita del proyecto MANES⁸ para advertir la presencia en los

⁷ Julia, *La construcción de las disciplinas escolares en Europa*, cit., p. 49.

⁸ Véase el sitio <<http://www.uned.es/manesvirtual/ProyectoManes/proyecto.htm>> (última conexión: 9 de octubre 2012). En 1992 se lanzó en España el proyecto interuniversitario de investigación MANES con sede en la Universidad Nacional de Educación a Distancia, siguiendo la estela del proyecto Enmanuelle en Francia. Convertido dicho proyecto en Centro de Investigación MANES, su objetivo principal lo constituye hoy la investigación de los manuales escolares producidos en España, Portugal y América Latina. Sus coloquios, seminarios y publicaciones son sin duda una fuente indispensable para la historia de las disciplinas y un instrumento más para su configuración como un campo de investigación propio.

mismos de secciones o apartados dedicados a la historia de las disciplinas a través de sus manuales. Así, por ejemplo, de los veinticuatro trabajos incluidos en el volumen colectivo editado por Tiana⁹, catorce se agrupan bajo el epígrafe de *Los manuales escolares y la historia de las disciplinas*; en el libro, asimismo colectivo, dirigido por Guereña, Ossenbach y del Pozo¹⁰ figura un epígrafe específicamente titulado *Enfoques disciplinares*; y en el editado por Gómez García y Trigueros Gordillo¹¹, sobre los manuales en la enseñanza secundaria, se dedica una última sección a *Las asignaturas y su evolución en los libros de texto*. En igual sentido se manifiesta¹² en relación con un campo, la historia de la enseñanza de la historia, que es justamente aquél que cuenta, en comparación con otros, con un mayor número de estudios completos y complejos. Quizás haya llegado la hora de preguntarse si, manteniendo sus rasgos y aspectos propios, no sería conveniente insertar dichos estudios en el contexto de la historia de las disciplinas o, al menos, conectarlos a la misma. Es decir, si en vez de seguir analizando las disciplinas escolares a través de los libros de texto no sería más lógico y fructífero analizar los libros de texto desde la historia de las disciplinas, considerándolos como uno de los instrumentos fundamentales para la determinación y el conocimiento de la evolución del código disciplinar respectivo – junto, entre otros, con las regulaciones prescritas del currículum, las memorias y ejercicios de las oposiciones, los programas o programaciones, los cuadernos, apuntes y ejercicios de los alumnos y los exámenes – y, por tanto, en el contexto, más amplio, del proceso de disciplinarización de la materia o campo en cuestión.

Algunos conceptos e ideas clave, de índole general, con los que estructurar la historia de las disciplinas

La mayoría de los estudios de historia de las disciplinas se centran en un campo o área determinada, utilizan como fuente fundamental los libros de texto y carecen de un aparato o marco conceptual y teórico explícito. La líneas que siguen pretenden establecer lo que podrían considerarse las bases

⁹ A. Tiana (ed.), *El libro escolar, reflejo de intenciones políticas e influencias pedagógicas*, Madrid, UNED, 2000.

¹⁰ J.-L. Guereña, G. Ossenbach, M^a del Mar Del Pozo (edd.), *Manuales escolares en España, Portugal y América Latina (siglos XIX-XX)*, Madrid, UNED, 2005.

¹¹ N. Gómez García, G. Trigueros Gordillo (edd.), *Los manuales de texto en la enseñanza secundaria (1812-1990)*, Sevilla, Kronos, 2000.

¹² R. Valls, *La historiografía escolar española en la época contemporánea: de los manuales de historia a la historia de la disciplina escolar*, in C. Forcadell, I. Peiró (edd.), *Lecturas de la Historia. Nueve reflexiones sobre Historia de la Historiografía*, Zaragoza, Institución «Fernando el Católico», 2001, pp. 191-220, en particular pp. 193-198.

mínimas de dicho marco aplicables, por su generalidad, a cualquier campo o área disciplinar. Dichas bases facilitarían las comparaciones y la transferencia de resultados entre los estudios relativos a distintos campos disciplinares.

Si las disciplinas pueden y deben ser consideradas como organismos vivos – nacen, evolucionan, se transforman, desaparecen, se fagocitan y engullen unas a otras, se desgajan, compiten, intercambian información, se aíslan, emparejan o forman tríos e incluso comunas, se atraen, se repelen o son indiferentes entre sí, tienen un nombre que las identifica, cambian de denominación y de apariencia, se jerarquizan, se hacen préstamos, se roban entre ellas, marcan su territorio: todo como en la vida misma – es posible hablar de un proceso de disciplinarización. Es decir, de conversión de una materia, de temas, de enfoques o de actividades en disciplinas académicas – o, a la inversa, de desdisciplinarización –, con avances, estancamientos y retrasos, en el que algo que no es todavía una disciplina, de modo pleno o según el modelo o tipo ideal, está en camino de serlo y puede ser calificado de protodisciplina o, como mucho, de proyecto de disciplina.

Lo primero que habría que deslindar y clarificar, pues, serían los conceptos de disciplina y de actividad, tarea o ejercicios. Lo segundo, dentro del proceso de disciplinarización, sería distinguir las diferentes fases que permitieran saber cuándo nos hallamos ante una protodisciplina o disciplina en germen y una disciplina como tal. Es decir, establecer cuáles son los elementos básicos que, de un modo más o menos sistemático u organizado, caracterizan una disciplina en el mundo académico.

Las disciplinas son, entre otras cosas, un producto más de las culturas escolares o, si se prefiere, de la gramática de la escolaridad. En este sentido, constituyen una modalidad más de las formas de hacer y pensar sedimentadas en el tiempo en forma de regularidades institucionales – en este caso, como asignaturas o campos de disciplinas afines – que conforman las culturas escolares. Como tales regularidades institucionales son, además, un producto social e histórico. Son el producto de un proceso de construcción como campos acotados que definen quienes están fuera y quienes están dentro. Un proceso en continua construcción resuelto, en sus diversas fases, mediante conflictos, negociaciones, acuerdos, componendas e imposiciones que reflejan las ortodoxias/heterodoxias en liza dentro de cada campo y las estructuras y relaciones de poder académico existentes en el mismo. La presencia de mecanismos de control, por parte de quienes ocupan y acotan el campo disciplinar, sobre la formación y el acceso al mismo, y la configuración de un código disciplinar ortodoxo, constituyen dos de sus rasgos fundamentales.

El núcleo fundamental de toda disciplina escolar, lo que le distingue de otras y la configura como tal, es el código disciplinar. Dicho código, o tradición socialmente construida en confrontación o alianza con otras tradiciones disciplinares, está integrado por un conjunto de ideas, valores, suposiciones y pautas formales e informales, explícitas o implícitas, sobre: (a) un cuerpo

de contenidos – saberes, conocimientos, destrezas, técnicas, habilidades – reconocible a través de memorias y ejercicios de oposiciones, libros de texto, programas, trabajos de alumnos y exámenes; (b) un discurso o argumentos sobre su importancia y utilidad académica, profesional y laboral y su valor formativo que legitiman la presencia de la disciplina en los planes de estudio; y (c) unas prácticas y rutinas profesionales relativas tanto al modo de transmitir, enseñar y aprender los contenidos respectivos – lo que implica, entre otras cosas, analizar el contexto espacial y temporal en que la disciplina se imparte, sus útiles y materiales didácticos, y los roles y modos de interacción entre profesores y alumnos – como al de presentarse en sociedad y en el mundo académico quienes las imparten¹³. La referencia final a las prácticas no es baladí. Nos alerta sobre la necesidad de distinguir entre la disciplina pretendida o soñada – la de las propuestas teóricas –, la regulada o prescrita – la de las normas legales – y la enseñada – la realidad –¹⁴, a las que habría que añadir, la vivida y apropiada o hecha suya por los alumnos.

Por otra parte, las disciplinas no existen u operan en un espacio vacío, neutro o aislado. Surgen, anidan y se forman en el seno de sistemas educativos y de formas de organización de la escolaridad determinadas. Sólo se entienden en relación con otras disciplinas y campos en el contexto de dichos sistemas y formas. Su denominación, su lugar, su peso y su presencia en un determinado plan de estudios han de ser puestos en relación, desde una perspectiva diacrónica, con los de otras materias o disciplinas y con la sucesiva serie de reformas y modificaciones estructurales o curriculares del sistema educativo o modalidad de enseñanza de la que forman parte. De ahí la necesidad de que su estudio vaya acompañado, o tenga en cuenta, los análisis de los procesos de sistematización, segmentación vertical (graduación) y horizontal (itinerarios y redes de centros diferenciadas), inclusión y exclusión (destinatarios) característicos de los sistemas educativos, así como de las tendencias o fuerzas internas (presiones propedéuticas, establecimientos modelo, culturas escolares) que los conforman¹⁵.

Las disciplinas y campos disciplinares son por último, como se ha dicho, construcciones sociales y, por tanto, humanas. Es más, constituyen espacios académicos y escolares que existen gracias a que son ocupados por seres humanos que son los que les dan vida. El elemento humano, los profesores adscritos a un determinado campo o disciplina, no puede dejarse a un lado. O,

¹³ R. Cuesta, *Sociogénesis de una disciplina escolar: la Historia*, Barcelona, Pomares-Corredor, 1997, pp. 20-21; y Id., *Campo profesional, formación del profesorado y apuntes de didáctica crítica para tiempos de desolación*, «Didáctica de las Ciencias Experimentales y Sociales», n. 17, 2003, pp. 3-23, en particular pp. 6-7.

¹⁴ R. Cuesta, *Clío en las aulas. La enseñanza de la Historia en España entre reformas, ilusiones y rutinas*, Madrid, Akal, 1998; y Valls, *La historiografía escolar española en la época contemporánea: de los manuales de historia a la historia de la disciplina escolar*, cit., p. 207.

¹⁵ Viñao, *Sistemas educativos, culturas escolares y reformas. Continuidades y cambios*, cit.

por ser más claros, otro aspecto fundamental de la historia de las disciplinas, sin el que no se entienden la formación y los cambios a lo largo del tiempo en los códigos disciplinares, es el de la historia de quienes las imparten y enseñan, de quienes las promueven y justifican y también, cómo no, de quienes ponen en cuestión su valor formativo y su existencia como tal disciplina académica.

Dicha historia, la de los profesores de una disciplina determinada – y la de los de otras disciplinas: no hay que olvidar nunca la visión que los demás tienen de uno mismo, el cómo nos ven otros –, abarca como mínimo la de su formación y titulaciones –¿cuáles poseían? ¿cuáles eran las exigidas? –, los modos de selección – requisitos, concursos y oposiciones con sus memorias y criterios de valoración –, la carrera docente, el asociacionismo profesional, los grupos, escuelas y colegios visibles e invisibles que formaban, y su presencia y peso académico, social e institucional.

La historia de cualquier disciplina exige, pues, como tarea previa o paralela, una prosopografía de quienes componen el campo disciplinar. El diccionario de la Real Academia de la Lengua Española define la prosopografía como una «Descripción del exterior de una persona o de un animal». Su etimología nos remite al griego clásico: «prosopón» ('aspecto') y «grafo» ('describir'). Sin embargo, el uso del término se ha generalizado en el campo de la historia para referirse a los estudios biográficos de todos o casi todos los componentes de un grupo social específico – por lo general profesional o político – con el fin de determinar y analizar no sólo sus características cuantitativamente mensurables, sino también, cada vez más, la urdimbre o tejido de relaciones e interacciones sociales generadas en el interior de dicho grupo. Relaciones e interacciones que contribuyen a diferenciarlo de otros – lo que permite saber quien está dentro o fuera del mismo –, a definirlo como tal grupo y a articular, en su interior, toda una serie de subgrupos, diferenciados entre sí pero en un continuo intercambio y movimiento de personajes, alianzas, conflictos, influencias y transvases de información y modos de actuación. De ahí la importancia, en la historia de las disciplinas, de las historias de vida y profesionales de quienes las impartieron, así como de relacionar la construcción social de las mismas con el proceso de profesionalización de sus docentes – la genealogía de la docencia como profesión en general y de cada categoría o cuerpo docente en particular –, y al menos en España, como en otros países, con el de la configuración de los cuerpos estatales de profesores.

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Filologia, editoria, educazione e identità nazionale: una tradizione per l'Italia

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Philology, publishing industry, education and national identity: a tradition for unified Italy

ABSTRACT: A real history of the 'linguistic unification' of the Italian nation is retraced through an attentive review of the publishing production between the nineteenth and the twentieth century. This history is contextualized within the larger historical-literary framework of the time that saw literary men, *in primis*, together with writers and publishers, deal with the more complex 'issue of the language'. In the ever increasing production of vocabularies (especially in the 1800s, the so-called «golden century of dictionary») as well as of grammars and lexicographies, and subsequently of textbooks, manuals and literary anthologies, one must read the emergence of large-scale national linguistic problems, which were the reflection of the expansion of a market which was now able, on the one hand, to enter in libraries and schools; and, on the other, to reach those social groups that were establishing, then perhaps for the first time, a different relationship with the 'Italian language'.

TEE/EET KEYWORDS: Language; Cultural Identity; Nationalization; Language Teaching; Publishing Industry; Italy; XIX-XX Centuries.

Perché in Italia ci sono ancora tanti analfabeti? Perché in Italia c'è troppa gente che limita la propria vita al campanile, alla famiglia. Non è sentito il bisogno all'apprendimento della lingua italiana, perché per la vita comune e familiare basta il dialetto. L'analfabetismo non è un bisogno, e perciò diventa un supplizio, un'imposizione da prepotenti. Per farlo diventare bisogno occorrerebbe che la vita generale fosse più fervida, che essa investisse un numero

sempre maggiore di cittadini, e così facesse nascere autonomamente il senso del bisogno, della necessità dell'alfabeto e della lingua¹.

Con queste parole il giovane Antonio Gramsci rifletteva sullo stato di salute di una nazione che aveva oramai fatto il suo ingresso nel Novecento inserendosi nell'agone internazionale e partecipando con velleità di espansione a quello scontro imperialista che avrebbe caratterizzato in modo sempre più acceso e sanguinoso tutto quel secolo. L'intervento di Gramsci, tra i primi di una lunga e appassionata riflessione², indicava comunque la necessità di non lasciarsi prendere da facili entusiasmi perché i drammatici problemi che il giovane Stato aveva dovuto affrontare erano ancora tutti presenti ad appesantire un cammino fortemente zavorrato dal passato. La risposta alla domanda per quale motivo l'Italia si trovasse ad avere ancora, passato il primo decennio del Novecento, un numero così alto di analfabeti rimandava a questioni inevitabilmente legate tra loro. La chiusura in spazi ristretti della vita sociale, che per troppi si fermava alla famiglia e al campanile, la prevalenza del dialetto come scambio per la comunicazione pubblica e affettiva, la mancanza di un più fervido e positivo contesto generale capace di coinvolgere un numero crescente di popolazione per la quale ancora l'analfabetismo più che una necessità rimaneva «un supplizio, un'impostazione da prepotenti». Il passaggio da contadini a cittadini, per riprendere il titolo di un saggio scritto anni fa da Silvio Lasaro³, avveniva in

¹ A. Gramsci, *Scritti giovanili 1914-1918*, Torino, Einaudi, 1958, p. 81.

² Molto si è lavorato sulla fisionomia di Gramsci linguista. Senza la pretesa di completezza sull'argomento si veda: L. Rosiello, *Problemi e orientamenti linguistici negli scritti di Antonio Gramsci*, «Quaderni dell'Istituto di Glottologia», n. 2, 1957, pp. 39-57; Id., *La componente linguistica dello storicismo gramsciano*, in A. Caracciolo, G. Scalia (edd.), *La città futura. Saggi sulla figura e il pensiero di Antonio Gramsci*, Milano, Feltrinelli, 1959, pp. 299-327; Id., *Problemi linguistici negli scritti di Antonio Gramsci*, in P. Rossi (ed.), *Gramsci e la cultura contemporanea*, Roma, Editori Riuniti, 1970, Vol. II, pp. 347-367; Id., *Linguistica e marxismo nel pensiero di Antonio Gramsci*, «Historiographia Linguistica», n. 9, 1982, pp. 431-452, poi in P. Ramat (ed.), *The History of Linguistics in Italy*, Amsterdam, Benjamins, 1986, pp. 237-258; T. De Mauro, *Questione della lingua*, in *Antonio Gramsci. Le sue idee nel nostro tempo*, Roma, Editrice l'Unità, 1987, pp. 118-119; Id., *Alcuni appunti su Gramsci linguista*, in V. Calzolaio (ed.), *Gramsci e la modernità. Letteratura e politica tra Ottocento e Novecento*, Napoli, CUEN, 1991, pp. 135-154; D. Boothman, *Traducibilità e processi traduttivi. Un caso: A. Gramsci linguista*, Perugia, Guerra, 2004. Ma si vedano anche, su posizioni discordanti: A. Carlucci, *Molteplicità culturali e processi di unificazione. Dialetto, monolinguisimo e plurilinguisimo nella biografia e negli scritti di Antonio Gramsci*, «Rivista italiana di dialettologia», n. 29, 2005, pp. 59-110; L. Mat. *La conquista dell'italiano nel giovane Gramsci*, in F. Lussana, G. Pissarello (edd.), *La linguale lingue di Gramsci e delle sue opere. Scrittura, riscrittura, lettere in Italia e nel mondo. Atti del Convegno Internazionale di Studi (Sassari, 24-26 ottobre 2007)*, saggio introduttivo di Giuseppe Vacca, Soveria Mannelli, Rubettino, 2008, pp. 51-61. Sulla struttura dei *Quaderni del carcere*, cfr. lo studio di G. Francioni, *L'officina gramsciana. Ipotesi sulla struttura dei «Quaderni del carcere»*, Napoli, Bibliopolis, 1984, e sui criteri della nuova edizione dei *Quaderni*, G. Cospito, *La nuova edizione critica dei «Quaderni»*, in Lussana, Pissarello (edd.), *La linguale lingue di Gramsci e delle sue opere*, cit., pp. 91-99.

³ S. Lanaro, *Da contadini a italiani*, in P. Bevilacqua (ed.), *Storia dell'agricoltura italiana in*

Italia tra mille cautele e la fondazione di una identità collettiva, così presente in altri paesi europei, invece di essere a carico di uno Stato elitario veniva demandata a istituzioni accademiche, scolastiche, culturali, all'esercito, o a quei fenomeni come le migrazioni interne cariche certamente di opportunità ma anche di dolorose discriminazioni e rotture. In questo contesto la questione della lingua avrebbe costituito dalla nascita dello Stato unitario «una costante essenziale del dibattito e della elaborazione politica e culturale intesa a costruire la nazione e una identità civile di massa»⁴. Una costruzione dell'identità civile che, proprio perché si svolgeva nel campo tutto politico del tentativo di creare una nazione, sarà da subito soggetta a spinte contrastanti con una partecipazione mai supina di tutti i protagonisti di quelle battaglie. L'intenso dibattito sulla lingua e la considerevole produzione di storie letterarie realizzate tra la metà dell'Ottocento e i primi decenni del Novecento dimostrano quale notevole impegno fu speso nel selezionare una serie di testi destinati a divenire canonici, assicurando così all'Italia un patrimonio condiviso e accettato. L'idea da cui muoveva questo incessante e ingrato lavoro era che occorresse fornire una tradizione letteraria e culturale omogenea capace di supportare il lavoro politico già svolto. L'altezza, ma anche l'asprezza e la virulenza in alcuni casi, del dibattito testimoniava che non si trattava di uno sterile accapigliamento tra filologi, ma che al contrario la posta in gioco era notevole e rischiosa. Vi era la consapevolezza della ricaduta delle scelte vincenti sull'università e soprattutto sulla scuola inferiore e superiore, come pure della discesa in campo in questa battaglia dell'intera editoria nazionale. Le diverse posizioni trovavano conforto e supporto nel lavoro imponente delle case editrici che a loro volta, e come è stato più volte sottolineato, si facevano portatrici di istanze e tensioni provenienti dagli ambienti politici e culturali della loro città⁵. Pomba, Paravia e Loescher a Torino, Zanichelli a Bologna, Agnelli e Treves a Milano, Le Monnier e Barbèra a Firenze, come pure Morano a Napoli, Giannotta e Galatola a Catania, Pedone Lauriel a Palermo, per citare alcuni nomi, mettevano i loro torchi e la loro rete commerciale a disposizione di tante appassionate ricerche.

Su questa storia ricca di tensioni e dominata dallo scontro tra modelli culturali alternativi hanno richiamato l'attenzione, specialmente in questi ultimi anni e con l'approssimarsi delle celebrazioni per il centocinquantenario dell'Unità

età contemporanea, Vol. 3: *Mercati e istituzioni*, Venezia, Marsilio, 1991, pp. 934-962.

⁴ S. Soldani, G. Turi, *Introduzione*, in S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea*, Vol. 1: *La nascita dello stato nazionale*, Bologna, il Mulino, 1993, p. 21.

⁵ Su questo argomento per quanto riguarda Firenze, centro nevralgico di questa battaglia, si possono leggere le riflessioni di Marino Raicich: *Quaranta anni dopo: Manzoni, Firenze capitale e l'unità della lingua e I libri per le scuole e gli editori fiorentini del secondo Ottocento*, entrambi i saggi ripubblicati in M. Raicich, *Di grammatica in retorica. Lingua scuola editoria nella Terza Italia*, Roma, Archivio Guido Izzi, 1996, pp. 43-88 e 89-142, e di G. Tortorelli, *Non bramo altr'esca: identità nazionale, cultura classica e selfhelpismo nelle edizioni Barbèra*, «Rara volumina», n. 1-2, 2011, pp. 59-100.

d'Italia, numerosi lavori interessanti come i volumi di Claudio Marazzini, *L'ordine delle parole. Storia di vocabolari italiani* e Francesco Sberlati, *Filologia e identità nazionali. Una tradizione per l'Italia unita (1840-1940)*. Edito il primo nel 2009 da il Mulino nella collana *Collezione di Testi e di Studi*, uscito il secondo nel 2011 presso Sellerio e inserito nella collana *Nuovo Prisma* diretta da Antonino Buttitta, i due volumi, pur riprendendo e sistemando temi e prospettive già affrontati in altre sedi, si completano offrendo al lettore un panorama esauriente e interpretazioni convincenti e stimolanti. Sollecitazioni che possono essere molto utili sia per gli storici dell'editoria che per quelli della scuola, se solo si pensi che il vocabolario insieme alla grammatica rappresenta, come sottolinea Marazzini, la norma linguistica per eccellenza contenendo in sé le potenzialità della lingua nazionale, o se ci si sofferma su quel mutamento profondo, qualitativo, evidenziato da Sberlati, che riguarderà il manuale di letteratura divenuto dopo il Risorgimento uno strumento di alfabetizzazione politica. Merito dei due autori è quello di non isolare né la lessicografia, né la filologia, mettendole anzi in relazione con la storia culturale del proprio tempo e con i retaggi classici e umanistici.

Non a caso il titolo scelto da Marazzini per il suo volume, *L'ordine delle parole*, indica uno spostamento e un cambiamento di contenuto e di funzione. Partendo dal vocabolario cinquecentesco che confermava il legame con la retorica «intesa come arte del trovare e del ricordare» e che «ambiva a descrivere il mondo, anzi voleva essere l'immagine del mondo racchiusa in un libro», Marazzini ricorda come bisognerà arrivare all'Ottocento perché l'ordine alfabetico trovi la «definitiva modernizzazione» con la separazione delle sezioni U e V «prima confuse per antica tradizione classica». Un'innovazione che potrebbe apparire come una modifica meramente tecnica, ma che al contrario dimostra quanto la storia della tecnica non vada trascurata risultando «parte integrante di una vicenda in cui contano molto l'evidenza dei lemmi e il sistema dei rinvii». Proprio affrontando questo intreccio di problemi, non vi è dubbio che gli storici dell'editoria e della scuola debbano partire dal settimo capitolo, *Continuità e innovazione nella lessicografia del Settecento*, per addentrarsi in questioni e dibattiti lontani da una separatezza chiusa e astratta. Già un'opera del primo Settecento, il *Vocabolario cateriniano* di Girolamo Gigli su cui aveva richiamato l'attenzione Bruno Migliorini in un saggio del 1940 e la cui storia è stata più di recente ripercorsa da Pietro Trifone⁶, introduce il lettore nel caso più noto di censura che abbia colpito un dizionario e il suo autore. Nato come progetto di una raccolta degli scrittori di Siena, di cui Gigli era cittadino, ma poi ridimensionato all'opera di Santa Caterina alle cui lettere l'autore intendeva aggiungere un lessico, il *Vocabolario cateriniano*, veniva

⁶ Il saggio di Migliorini è ora compreso in B. Migliorini, *Lingua e cultura*, Roma, Tumminelli, 1948, pp. 167-189; P. Trifone, *Il «Vocabolario cateriniano» di Girolamo Gigli*, con una nota bibliografica di E.P. [Ettore Pellegrini], «Accademia dei Rozzi», vol. 11, n. 20, 2004, pp. 15-20.

meno «a una regola che generalmente la lessicologia dà l'impressione di rispettare, quella dell'oggettività e imparzialità, che si traduce in apparente distacco»⁷. Alla proposta, avanzata da Anton Francesco Marmi, di ripulire gli scritti di santa Caterina dai senesismi Gigli aveva reagito non solo decidendo di dedicare l'intero dizionario all'opera della scrittrice preferita, ma accentuando polemicamente il carattere antiflorentino e anticruscante del proprio commento. La satira contro la parlata fiorentina diventava violenza polemica e si legava al tentativo non solo di celebrare la lingua senese ma di darle una «tradizione culturale». Un'impostazione e una scelta di campo che attirarono sull'opera composta da Gigli la reazione altrettanto aggressiva dei suoi oppositori: non solo l'autore venne bandito da Roma e cacciato dalla Crusca ma addirittura alcune pagine già stampate del suo vocabolario furono bruciate al suono della campana del Bargello.

Se il *Vocabolario cateriniano* rimane «un libro anomalo, unico nel suo genere», appartenendo in primo luogo al tentativo di Girolamo Gigli di rivalutare la storia culturale senese, un posto molto più importante viene assegnato da Marazzini, sulla scorta di studi autorevoli e consolidati, a Francesco Alberti di Villanova «lessicografo prolifico e di successo, forse quello che meglio rappresenta l'evoluzione del vocabolario italiano nell'età dei Lumi». Rappresentante di «un'autentica rivoluzione nella tradizione lessicografica, legata ancora agli schemi della Crusca»⁸, ad Alberti è stata riconosciuta la capacità di raccogliere le istanze più moderne sia della consuetudine secentesca che della «attualità culturale settecentesca», tanto da lasciare in eredità «un metodo di fare dizionari aperto a confronti europei e rispondente agli stimoli dell'enciclopedismo»⁹. È un giudizio che Marazzini condivide, corroborato dallo studio più ampio e sistematico sulla figura di Alberti¹⁰, mettendo in risalto anche le qualità del fortunato *Dizionario francese-italiano e italiano-francese*, primo lavoro di confronto tra i due idiomi al quale Alberti si era dedicato, e soprattutto del *Dizionario del cittadino o sia ristretto storico, teorico e pratico del commercio*¹¹. Entrambi possono essere considerati studi propedeutici alla

⁷ Sulla vicenda del *Vocabolario cateriniano* si veda C. Marazzini, *L'ordine delle parole. Storia di vocabolari italiani*, Bologna, il Mulino, 2009, pp. 195-209.

⁸ P. Zolli, *Innovazione e tradizione nel «Nouveau Dictionnaire François-Italien di F. Alberti di Villeneuve»*, in *Melanges à la mémoire de Franco Simone*, Gèneve, Slatkine, 1981, Vol. II, pp. 589-627. Luca Serianni ha parlato dell'opera dell'Alberti come del primo «vero stacco colla tradizione cruscante», in L. Serianni, *La lessicografia*, in L. Formigari (ed.), *Teorie e pratiche linguistiche nell'Italia del Settecento*, Bologna, il Mulino, 1984, p. 115.

⁹ M. Sessa, *La terminologia delle arti e dei mestieri. Appunti su Alberti di Villanova*, in Formigari (ed.), *Teorie e pratiche linguistiche nell'Italia del Settecento*, cit., p. 205.

¹⁰ A. Mura Porcu, *Il dizionario universale della lingua italiana di F. Alberti di Villanova*, Roma, Bulzoni, 1990.

¹¹ Il *Dizionario del cittadino* era in realtà la traduzione accresciuta del *Dictionnaire du Citoyen, au Abregé historique, théorique et pratique du commerce* di Honoré Lacombe de Prezel. Come sottolinea Marazzini si tratta di un lavoro, precedente al dizionario bilingue francese-italiano, dove si riscontra un debito innegabile con la cultura d'oltralpe. D'altra parte, continua Marazzini, «non

sua opera più impegnativa, quel *Dizionario universale critico, enciclopedico della lingua italiana* stampato a Lucca tra il 1797 e il 1805 in parte postumo, al quale seguiranno due importanti edizioni¹². Anche limitandosi alla prima pubblicazione, per Marazzini si tratta di un'opera che aveva finito per segnare «in maniera indelebile il rinnovamento della lessicografia italiana del tempo, impedendo di tornare indietro». Tra i punti di non ritorno vi era certamente l'insanabile contrasto con gli eredi della Crusca, tanto da fare scrivere all'Alberti, in una delle lettere indirizzate all'editore Giuseppe Rimondini¹³, della «guerra intestina che mi muovono alcuni pretesi eredi della Crusca sul timore che 'l mio Dizionario non pregiudichi alla lor cupidigia». Un comportamento che impegnava «maggiormente il mio zelo a rendere inutili, se posso, tutte le Crusche future». Se comunque lo scontro era stato combattuto da entrambe le parti con forte determinazione, trasferendo anche il terreno di battaglia dai contenuti agli ostracismi editoriali, questo impegno non aveva distolto Alberti dal dimostrare una speciale attenzione alla terminologia tecnica e all'inserimento di parole tratte dal toscano vivo, da quel lessico «di mestiere»

si tratta di semplice casualità: l'Alberti era suddito sabauda, e la cultura degli stati sabaudi non si era ancora segnalata per contributi importanti nel campo della lingua italiana, tanto meno nel campo della lessicografia». Se comunque, oltre al debito verso la cultura francese, il dizionario non poteva evitare di essere una raccolta di forestierismi utili per l'uomo impegnato nel commercio, per Marazzini bisogna dare il giusto risalto alla presenza di parole tecniche recepite da Alberti nei suoi viaggi in Toscana dove aveva intervistato artigiani e osservato i loro attrezzi di lavoro, cfr. Marazzini, *L'ordine delle parole*, cit., pp. 211-214. Ma si veda anche per una prospettiva più ampia M. Sessa, *Appunti sui dizionari italo-francesi apparsi prima della fine del Settecento*, «Studi di lessicografia italiana», n. 3, 1981, pp. 29-66, e C. Morello, *Dizionari bilingui con schede sui dizionari italiani per francese, inglese, spagnolo, tedesco*, Bologna, Zanichelli, 1989.

¹² Il luogo di edizione e gli editori non furono ininfluenti in questa vicenda. La prima edizione uscì a Lucca tra il 1797 e il 1805. Stampata in sei volumi su tre colonne dal tipografo Marescandoli fu seguita nel 1825 da una seconda edizione stampata su due colonne e con dedica a Vincenzo Monti. Pubblicata dall'editore Luigi Cairo l'opera conteneva anche una *Prefazione critico-ragionata* del curatore Francesco Antolini e la biografia dell'Alberti firmata dal suo collaboratore Francesco Federighi. Come sottolinea Marazzini (*L'ordine delle parole*, cit., p. 215), Antolini aveva la pretesa di andare oltre la curatela di un'opera non sua affermando che non di una ristampa dell'edizione lucchese si trattava, ma di un vero e proprio rifacimento. La terza edizione edita a Milano nel 1834-1835 fu curata ancora dall'Antolini che vi inserì il saggio *La lessicomania esaminata* dedicato all'esame dell'Alberti e dei principali dizionari usciti all'inizio dell'Ottocento.

¹³ G. Cartago, *Tre lettere inedite di Francesco Alberti di Villanova all'editore Giuseppe Remondini intorno alla questione del Vocabolario*, «Lingua nostra», vol. 54, 2005, pp. 9-13, ora in G. Cartago, *Lingua letteraria, delle arti e degli artisti*, Firenze, Franco Cesati, 2005, pp. 93-99. Le lettere pubblicate da Gabriella Cartago indicano ora con certezza il tentativo compiuto da Alberti di Villanova di pubblicare il vocabolario a Firenze. Per questa impresa era stato contattato lo stampatore granducale Cambiagi, ma senza che il progetto avesse seguito. L'ostilità era stata subito netta verso «uno straniero – scrive Marazzini – che pretendeva di imprimere un suggello di autorevolezza alla propria opera facendola stampare in quella che era stata (e in sostanza ancora era) la roccaforte del conservatorismo tradizionalista cruscante», in *L'ordine delle parole*, cit., p. 216. Per un profilo degli interessi e delle opere di Alberti di Villanova si rinvia alla voce di Alberto Asor Rosa in *Dizionario biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, 1960, Vol. I, pp. 719-720.

raccolto consultando pittori, orologiai, lanaioli, calzolai, costruttori, marinai. Era un impegno che guardava avanti recependo i cambiamenti della società, ma che non dimenticava di cimentarsi e recuperare, secondo gli intenti della lessicografia cinquecentesca, la possibilità «di racchiudere le parole di un libro ordinandole in forma di specchio del mondo». L'intento di Alberti, espresso nella prefazione alla prima edizione del *Dizionario* poi non portata a termine per la morte dell'autore, era di costruire un «albero sistematico» diviso nelle branche Dio, Uomo, Mondo, dove potere ricercare attraverso la mediazione analogica non soltanto ciò che è noto attraverso l'ordinamento alfabetico, ma anche quello che è ignoto.

Le pagine dedicate ad Alberti aprono la strada nel volume di Marazzini sia all'esame di figure e opere minori, ma nel loro ambito ugualmente significative, sia all'analisi ulteriore delle ultime pubblicazioni della Crusca. In particolare vengono esaminati i contributi di Antonio Vallisnieri e Giovan Pietro Bergantini alla lessicografia scientifica. Seguendo le tracce di un saggio di Silvia Morgana dal titolo significativo¹⁴, Marazzini sottolinea la notevole importanza del *Saggio alfabetico d'istoria medica e naturale* di Antonio Vallisnieri al quale lo stesso Alberti aveva attinto riprendendo termini e vocaboli. Un progetto al quale Vallisnieri aveva lavorato per due anni, nel 1726 e nel 1727, con la consapevolezza del «forte ritardo culturale dell'Italia a causa di una tradizione lessicografica rallentata dai pregiudizi letterari». Anche in questo caso, comunque, non mancava la presa di distanza rispetto ai cruscanti unita a un forte timore per le reazioni risentite che molte sue correzioni avrebbero potuto provocare¹⁵. In questo quadro di rinnovamento Marazzini inserisce il veneziano Giovan Pietro Bergantini «che sembra rappresentare le ambizioni ancora irrisolte e mancate di una tradizione lessicografica alla ricerca di una via di mutamento»¹⁶, ma «in difficoltà nel portare a compimento, sino alla stampa, grandi progetti». Nonostante il severo giudizio di Vincenzo Monti sulla sua opera, «un inerte e vasto coagulo di parole», e nonostante il *Dizionario dell'eloquenza italiana*, in dieci volumi più uno di supplemento, e il *Dizionario universale italiano*, in sei volumi più uno di aggiunte, siano rimasti inediti, autorevoli studiosi hanno riconosciuto gli «innegabili caratteri positivi di questo lessicografo, rispetto all'immobilità della tradizione cruscante», non fosse altro per avere anticipato gli interessi tecnico-scientifici di Alberti di Villanova¹⁷. Anche se

¹⁴ S. Scotti Morgana, *Esordi della lessicografia scientifica italiana. Il «Saggio alfabetico d'istoria medica e naturale» di Antonio Vallisnieri*, Firenze, La Nuova Italia, 1983. Il volume contiene la ristampa anastatica del *Saggio*.

¹⁵ Le preoccupazioni per un possibile scontro con i fiorentini erano esplicitate in una lettera ad Antonio Ludovico Muratori, tanto che Vallisnieri si dichiarava favorevole a pubblicare l'opera sotto il nome di un allievo. Rimasto inedito il *Saggio alfabetico* vedrà poi la luce grazie all'interessamento del figlio che vi scrisse anche una breve presentazione.

¹⁶ Cfr. il paragrafo su Bergantini, in Marazzini, *L'ordine delle parole*, cit., pp. 225-228.

¹⁷ Tra i primi ad esaminare Bergantini fu Gian Luigi Beccaria con la voce a lui dedicata nel *Dizionario biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, 1967, Vol. IX, pp.

motivati da una carica polemica questi autori continuarono sempre a misurarsi con l'ingombrante dirimpettaio della Crusca la cui ultima edizione completa, la quarta, risale proprio al Settecento, essendo uscita tra il 1729 e il 1738. Marazzini evidenzia, anche in questo caso, l'importante contributo dell'editoria le cui vicende finirono per avere un peso rilevante sia nella pubblicazione dell'edizione¹⁸, sia in quel nuovo fenomeno delle ristampe e dei compendi non ufficiali. Un processo non trascurabile la cui analisi permette di avere una idea più precisa della diffusione del *Vocabolario*, delle richieste del pubblico e della vitalità di quell'editoria «che si muoveva senza troppo creatività all'ombra del lavoro lessicografico fiorentino»¹⁹. Vengono così elencati e brevemente esaminati compendi e ristampe: dal compendio stampato nel 1739 a Firenze da Domenico Maria Manni, sostanzialmente identico alla quarta Crusca, all'altro compendio del 1741 curato a Venezia per l'editore Baseggio da Apostolo Zeno, alle tre ristampe integrali pubblicate, in ordine di tempo, a Venezia, Napoli, e ancora a Venezia nel 1763-1764²⁰.

84-87. Ma si vedano soprattutto S. Scotti Morgara, *Tradizione e novità nei vocabolari inediti di Giovanpietro Bergantini*, in *La Crusca nella tradizione letteraria e linguistica italiana*, in *Atti del Congresso internazionale per il IV centenario dell'Accademia della Crusca (Firenze, 29 settembre-2 ottobre 1983)*, Firenze, Accademia della Crusca, 1985, pp. 153-171, poi in S. Morgana, *Capitoli di storia linguistica italiana*, Milano, Edizioni Universitarie di Lettere Economia Diritto, 2003, pp. 117-154.

¹⁸ Sulla quarta edizione della Crusca cfr. la ricostruzione che ne fa Maurizio Vitale, ora compresa in M. Vitale, *L'oro nella lingua. Contributi per una storia del tradizionalismo e del purismo italiano*, Milano-Napoli, Ricciardi, 1986, pp. 349-382, che parla di «conservatorismo liberale» in una linea di tendenza in parte senza interruzioni rispetto alle precedenti edizioni.

¹⁹ M. Sessa, *Fortuna e sfortuna della IV impressione del Vocabolario della Crusca*, in *La Crusca nella tradizione letteraria e linguistica italiana*, cit., pp. 183-191, e in un quadro più completo Ead., *La Crusca e le Crusche. Il «Vocabolario» e la lessicografia italiana del Sette-Ottocento*, Firenze, Accademia della Crusca, 1991.

²⁰ Sulla ristampa integrale napoletana, curata da Pasquale Tommasi e pubblicata nel 1746-1748 in cinque volumi in folio, cfr. L. Berti, *Pasquale Tommasi e la ristampa napoletana della IV edizione della Crusca*, «Lingua nostra», vol. 34, 1973, pp. 73-80. Su Venezia e Napoli, con Firenze «città interessate a questo fiorire di opere lessicografiche», scrive Marazzini «la prima vivendo ancora l'effetto della antica tradizione editoriale che ne aveva fatto uno dei centri dell'industria libraria europea, la seconda forse in seguito alla tradizione locale del filo toscanismo di Leonardo di Capua e del suo discepolo Niccolò Amenta». Anche se di più rapida consultazione rispetto alla Crusca, continuerà Marazzini, i compendi «non erano tuttavia la forma più leggera di dizionario allora disponibile. Infatti vennero allestiti anche lessici di formato piccolo e maneggevole, facili nell'uso, che riprendevano dalla Crusca solo i lemmi». E si fa riferimento in particolare «alla categoria dei dizionari portatili, di rapido uso e di pronta consultazione» pratici, maneggevoli, adatti all'impiego scolastico, di cui la *Prosodia italiana*, realizzata alla fine del Seicento, dal palermitano Placido Spadafora, può rappresentare un antesignano della *Ortografia moderna italiana di Jacopo Facciolati* consigliato ad Alfieri dal padre Paolo Maria Paciaudi affinché lo tenesse sempre sul tavolino «per sapere bene la lingua che si vuole scrivere». Su questi passaggi editoriali, come su autori e testi citati, cfr. Marazzini, *L'ordine delle parole*, cit., pp. 228-232 e 243-245, F. Caliri, *Placido Spadafora e il dibattito ortografico nel Cinque-Seicento*, «Nuovi Annali della Facoltà di Magistero dell'Università di Messina», n. 6, 1988, pp. 249-335; Id., *Nota sulla lessicografia del Seicento. La «prosodia italiana» di Placido Spadafora*, in *Letteratura, lingua*

Se il Settecento, nonostante il rinnovamento e la fortuna di edizioni non ufficiali e di compendi rimase anche «il secolo in cui l'Accademia della Crusca raggiunse l'apice della crisi, fino ad essere soppressa, riducendosi a una classe dell'Accademia fiorentina», sarà l'Ottocento «il secolo d'oro dei dizionari». Una stagione, scrive Marazzini, «quale non si era mai vista prima, vivacissima per ricchezza di produzioni, per qualità, per varietà di realizzazioni»²¹. Fu in questo periodo che «finalmente i dizionari si rinnovarono sul serio e i compilatori fecero davvero i conti con la questione della lingua», agevolati in questo compito dalla rottura del «monopolio della Crusca» capace tuttavia di rinascere dopo che nel 1811 Napoleone le aveva restituito «piena autonomia e il compito di curare la revisione del *Dizionario della lingua italiana*»²². Marazzini si interroga sui motivi di questa «lessicomania»²³ capace di produrre e vendere un numero alto di edizioni di vocabolari e li trova giustamente in un ampliamento del mercato capace ora di entrare nelle biblioteche, nelle scuole e di raggiungere quei «ceti sociali che forse instauravano allora per la prima volta un rapporto diverso con la lingua italiana». Questo spiega a suo avviso, ma dal punto di vista della storia dell'editoria occorrono analisi più puntuali e argomentate su questo tema, «come mai la produzione lessicografica fosse forte soprattutto in città importanti, ma periferiche, lontane da Firenze»²⁴. Se la questione della lingua ebbe conseguenze dirette sulla produzione delle grammatiche e della lessicografia, la «questione del vocabolario» finì per diventare «una comprensibile appendice della questione della lingua in cui si

e società in Sicilia. Studi offerti a Carmelo Musumarra, Palermo, Palumbo, 1983, pp. 93-111; A. Masini, *Jacopo Facciolati l'«Ortografia moderna italiana» di Padova e la IV edizione del Vocabolario della Crusca*, in *La Crusca nella tradizione letteraria e linguistica italiana*, cit., pp. 173-182; Id., *Regionalismi e voci di lingua in un «Vocabolario domestico» del 1741*, «Rendiconti dell'Istituto Lombardo-Accademia di Scienze e Lettere. Classe di Lettere», vol. 114, 1980, pp. 142-180.

²¹ *L'Ottocento, secolo d'oro della lessicografia* è il titolo significativo che Marazzini ha dato al sesto capitolo di *L'ordine delle parole*, cit., pp. 247-315.

²² Come sottolinea Marazzini è da notare la dicitura, alla francese, *Dizionario* usata nel decreto napoleonico, e non *Vocabolario*, secondo la secolare tradizione dell'Accademia, in *L'ordine delle parole*, cit., p. 231.

²³ Il termine «lessicomania», usato da Mirella Sessa (*La Crusca e le Crusche*, cit., p. 169) per caratterizzare l'eccessiva produzione di dizionari, è ripreso, come sottolinea Marazzini, dal titolo *Lessicomania esaminata* usato da Francesco Antolini per il volume in cui sottoponeva a una critica severa tutti i principali dizionari della prima metà dell'Ottocento.

²⁴ Sulle implicazioni sociolinguistiche legate alla circolazione dei dizionari sono da leggere le considerazioni che Marazzini trae dal duplice elenco dei sottoscrittori presente nell'edizione 1825 dell'Alberti di Villanova da lui posseduta. La peculiarità degli elenchi (editi nel primo e nel terzo tomo) consiste nello specificare le professioni degli acquirenti, cfr. Marazzini *L'ordine delle parole*, cit., pp. 247-252. Per un quadro più ampio legato a questi cambiamenti Marazzini rinvia a G.L. Beccaria, *Italiano al bivio: lingua e cultura in Piemonte tra Sette e Ottocento*, in *Piemonte e letteratura 1789-1870. Atti del Convegno S. Salvatore Monferrato, 15-17 ottobre 1981*, a cura di G. Joli, Torino, Regione Piemonte-Assessorato alla Cultura, s.d. [ma 1983], Vol. I, pp. 15-55.

manifestarono problemi linguistici nazionali di grande portata»²⁵. Ne sono testimonianza anche quelle esperienze ancora legate a un prestigio in declino o ad un dibattito invecchiato come la quinta impressione della Crusca avviata nel 1863 e arrestatasi nel 1923, che per Marazzini meriterebbe di essere rivalutata «per l'attenuazione dell'atteggiamento arcaicizzante e del toscano centrismo» accompagnati comunque a «una profonda diffidenza per la terminologia tecnico-scientifica», o la «rivisitazione», con aggiunte e note polemiche, della quarta impressione della Crusca portata avanti con un forte impegno editoriale dal padre Antonio Cesari²⁶. Opera anche questa nata non certo per innovare, anzi Cesari rimproverava all'Accademia della Crusca di non aver fatto abbastanza, ma che per Marazzini merita una particolare attenzione perché riporta la necessità di affrontare il grande successo del Purismo dovuto «al particolare clima culturale del tempo» e «al desiderio di vendicare attraverso la riscoperta e rivalutazione delle pure origini italiane lo strapotere del francese». Peculiarità che si erano poi alleate alla «grande presa su educatori e insegnanti per la cristallina elementarità della sua formula politica». Se comunque il Purismo poté godere di un clima culturale favorevole fu anche sottoposto alle critiche di avversari agguerriti e temibili. A questo proposito Marazzini si sofferma in particolare sulla posizione di Vincenzo Monti che già dal 1813 aveva attaccato Antonio Cesari dalle pagine de «Il Poligrafo»²⁷. Una critica estesa, in seguito, allo stesso lavoro della Crusca con una serie di polemiche raccolte nella *Proposta di alcune correzioni ed aggiunte al Vocabolario della Crusca* uscita dal 1817 al 1824, con una appendice nel 1826²⁸. Opera di insieme, anche se dominata dalla figura di Monti, la *Proposta* documentava gli errori dovuti alla scarsa competenza filologica dei vocabolaristi fiorentini e l'inadeguatezza del Vocabolario della Crusca oramai «caratterizzato da una visione angusta della lingua». Visione tuttavia ancora capace di condizionare pesantemente la lessicografia italiana incerta nel proporre lavori originali che sapessero rompere con il passato. Da qui, sottolinea Marazzini, derivava il metodo delle «giunte» che consisteva nel «sommare l'esistente», una operazione meccanica incapace di investire la ricerca concreta. E vengono ricordati a questo proposito il *Vocabolario della lingua italiana* di Giuseppe Manuzzi, il *Dizionario della lingua italiana* in sette volumi

²⁵ Per un inquadramento più ampio cfr. P. Cardin, M.G. Lo Duca, *La grammatica nelle voci verbali di due grandi imprese lessicografiche dell'Ottocento*, «Studi linguistici italiani», vol. 26, 2000, pp. 52-96.

²⁶ Precisazioni sulle date di pubblicazione dei sette tomi dell'opera, usciti tra il 1806 e il 1811, sulle tirature e sui vincoli editoriali sono nelle note di Andrea Dardi in E. Benucci, A. Dardi, M. Fanfani (edd.), *La Crusca nell'Ottocento*, Firenze, Società Editrice Fiorentina, 2003, p. 35; M. Berengo, *Intellettuali e librai nella Milano della Restaurazione*, Torino, Einaudi, 1980, p. 30.

²⁷ Cfr. V. Monti, *Gli scritti di Vincenzo Monti sulla lingua italiana*, introduzione e note di A. Dardi, Firenze, Leo S. Olschki, 1990.

²⁸ L'opera di Monti è ricordata da Marazzini (*L'ordine delle parole*, cit., p. 257) «non solo quale pietra miliare nel dibattito sulla questione della lingua, ma anche come importante tappa nella storia della lessicografia italiana».

di Francesco Cardinale, Francesco Orioli, Paolo Costa, e l'altro *Dizionario della lingua italiana*, anche questo in sette volumi e uscito a Padova, di Luigi Carrer e Fortunato Federici. In questo contesto, e muovendosi ancora con il metodo delle aggiunte asteriscate al lavoro della Crusca, sarà il *Vocabolario universale italiano* diretto da Raffaele Liberatore a rappresentare una vera novità. Il *Vocabolario universale italiano*, conosciuto anche come Tramater dal nome dello stampatore napoletano, si segnalava infatti sia per l'impostazione enciclopedica, sia per la ripresa dell'attenzione nel solco del lavoro di Alberti di Villanova, alle voci tecniche, di scienze, di arti e mestieri. Soprattutto mostrando «lo sforzo per superare le definizioni tradizionali largamente insufficienti nei settori della zoologia e della botanica»²⁹. Era un modello, quello portato avanti dal Tramater, che conviveva e dialogava con il settore dei vocaboli specialistici in forte espansione per tutto l'Ottocento. Marazzini ricorda il *Dizionario militare* di Giuseppe Grassi, edito nel 1817 e poi ancora con aggiunte nel 1833, che colmava una lacuna nella nostra lessicografia attingendo con un'opera nuova e originale alla tradizione specifica piemontese, il *Dizionario della economia politica e del commercio* di Gerolamo Boccardo, il *Dizionario del linguaggio italiano storico ed amministrativo* di Giulio Rezasco, uscito a Firenze nel 1881, e i lavori di Alberto Guglielmotti, *Vocabolario marino e militare*, e di Eugenio Canevazzi, *Vocabolario di agricoltura* editi nel 1889 e tra il 1871 e il 1892. Giustamente si sottolinea come fu anche attraverso questi strumenti che venne intrapreso in Italia il «tormentoso processo di adeguamento alla modernità». Non a caso i lavori citati apparvero a ridosso o subito dopo l'Unità quando si manifestò con più forza l'esigenza di adeguare il nostro lessico e la nostra preparazione culturale a quella degli altri paesi europei. Proprio dove la lingua italiana «dimostrava di essere particolarmente debole e poco utilizzabile», cioè nel settore tecnico-pratico e familiare, si inaugurò una stagione floridissima per la lessicografia metodica che partiva con l'opera di Giacinto Carena per continuare con il *Vocabolario domestico* di Gianfrancesco Rambelli³⁰.

²⁹ Marazzini, *L'ordine delle parole*, cit., p. 272. Ma si veda tutto il paragrafo *Il napoletano Tramater*, pp. 272-277, dove si nota anche come «sia la prima (1829-40) sia la seconda (1845-56) edizione del Tramater si collocano in anni non lontani dalle edizioni del più conservatore vocabolario del Manuzzi, quasi a indicare in maniera tangibile la coesistenza di due diverse anime nella lessicografia italiana». Cfr. anche le annotazioni di L. Serianni, *Il primo Ottocento*, Bologna, il Mulino, 1989, p. 64, e lo specifico saggio di E. De Roberto, *Aspetti della composizione con elementi neoclassici nella lessicografia ottocentesca: i composti ibridi nel Tramater*, in C. Giovanardi (ed.), *Lessico e formazione delle parole. Studi offerti a Maurizio Dardaro per il suo 70° compleanno*, Firenze, Franco Cesati, 2005, pp. 131-157.

³⁰ Si vedano i lavori di Carla Marellò, *Lessico ed educazione popolare. Dizionari metodici italiani dell'800*, Roma, Armando, 1980; Ead., *Come Carena rispose a Manzoni*, in *L'arte di interpretare. Studi critici offerti a Giovanni Getto*, Cuneo, L'Arciere, 1984, pp. 533-544; Ead., *Stampare e scrivere dizionari speciali in Piemonte prima e dopo Tommaseo*, in G.L. Beccaria, E. Saletti, *La lessicografia a Torino da Tommaseo al Battaglia. Atti del Convegno di Torino-Vercelli, 7-9 novembre 2002*, Alessandria, Edizioni dell'Orso, 2005, pp. 179-204.

Nessuna delle grandi compilazioni dell'Ottocento, tuttavia, si può avvicinare al *Dizionario della lingua italiana* del Tommaseo. Secondo Marazzini «il salto di qualità è sostanziale, anche perché quest'opera non segue meccanicamente la traccia delle altre precedenti, ma si caratterizzava per l'originalità, legata alla singolare figura dell'autore». Una originalità marcata dalla famosa «T» con cui Tommaseo siglava i lemmi «in cui lo scrittore non ha voluto avvalersi dell'impersonalità vera o simulata di cui sembrano servirsi di solito i lessicografi». Ma la «partecipazione umorale» se caratterizzava il lavoro di Tommaseo certo non impediva una partecipazione più ampia con il coinvolgimento di validi collaboratori, tra cui Bernardo Bellini che aveva acquisito esperienza nella revisione del *Tramater*, e dell'editore Pomba. E giustamente Marazzini si sofferma sull'incontro fruttuoso tra il dalmata e Giuseppe Pomba mettendone in risalto le implicazioni socioculturali. Spetterà proprio a un editore «fuori dai santuari della lessicografia tradizionale» e lontano da Firenze arrischiare la sue finanze in una impresa che nasceva in Piemonte dove «l'italiano era stato considerato un elemento estraneo, un bene da conquistare attraverso lungo studio, con la fatica di chi arriva alla lingua partendo da un dibattito molto diverso, condizionato dalla forte influenza della cultura d'oltralpe»³¹. I motivi del perché «il suo vocabolario è quello che meglio concilia la dimensione del tempo presente e quello della durata», sino a farne «il primo vero vocabolario storico della nostra lingua», sono individuati da Marazzini oltre che nella mole e nell'abbondanza dei lemmi anche nella strutturazione delle voci³².

Se al *Dizionario della lingua italiana* è riservata la parte più cospicua nel capitolo dedicato all'Ottocento non vengono dimenticati nelle pagine finali tutti quei tentativi che, anche se limitati, poco fortunati o innovativi e attenti alla realtà periferiche, resero il panorama editoriale quanto mai ricco di offerte e proposte. Dal vocabolario milanese di Francesco Cherubini, a lungo consultato da Manzoni³³, al *Novo vocabolario della lingua italiana secondo l'uso di Firenze* di Emilio Broglio e Giovan Battista Giorgini³⁴, sino ai repertori puristici. Su questi ultimi si sofferma Marazzini mettendo in evidenza come proprio

³¹ Marazzini, *L'ordine delle parole*, cit., p. 285, ma si veda tutto il quarto capitolo, Il «Dizionario» di Tommaseo e l'Unità d'Italia, pp. 282-298. Per un riferimento preciso alla pubblicazione del *Dizionario* nelle edizioni Pomba, cfr. L. Firpo, *Vita di Giuseppe Pomba da Torino*, Torino, UTET, 1975, p. 162. Per una ricostruzione complessiva con riferimenti anche al ruolo di collaboratori come Bernardo Bellini cfr. M. Fanfani, *Tommaseo e il «Dizionario della Lingua Italiana»*, in Beccaria, Saletti (edd.), *La lessicografia a Torino da Tommaseo al Battaglia*, cit., pp. 242-261.

³² Le osservazioni di Gianfranco Folena nella *Presentazione* alla ristampa anastatica di N. Tommaseo, B. Bellini, *Dizionario della lingua italiana*, Milano, Rizzoli, 1977.

³³ Su cui L. Danzi, *Lingua nazionale lessicografica milanese. Manzoni e Cherubini*, Alessandria, Edizioni dell'Orso, 2001.

³⁴ Cfr. l'introduzione di Ghino Ghinassi, *Alessandro Manzoni e il «Novo Vocabolario della lingua italiana»*, alla ristampa anastatica dell'opera, 1979, pp. 5-33.

nell'Ottocento, riprendendo un interesse già avviato nel secolo precedente³⁵ si diffuse «il gusto per le raccolte di voci da proscrivere con l'intento di realizzare uno strumento di consultazione opposto al comune vocabolario». Mentre il vocabolario «raccolge e definisce le parole degne di essere usate, o comunque adoperate dagli scrittori del passato, i repertori di voci da proscrivere, invece, si presentano come musei dell'orrore, ammasso di parole da evitare». Si iniziò con la pubblicazione nel 1812 del primo dizionario puristico, dovuto a Giuseppe Bernardoni, e si continuò con il successo editoriale di numerosi repertori³⁶. Comune a tutti i vocabolari puristici – Marazzini ne cita molti compreso il più famoso *Lessico dell'infima e corrotta italianità* di Pietro Fanfani e Costantino Arlèa edito a Milano nel 1877 e poi nel 1881 da Paolo Carrara³⁷ – rimaneva la lotta contro dialettismi e francesismi. Una battaglia persa, non solo perché molti vocaboli e locuzioni stranieri hanno finito per fare parte della nostra lingua, ma anche perché l'Ottocento fu anche il secolo d'oro della lessicografia dialettale. È infatti in questo secolo che vedranno la luce tutti i più importanti vocaboli dialettali capaci di assumere una rilevanza e precise ambizioni certo differenti dai tentativi, pure comunque da segnalare, settecenteschi. Se infatti nel Settecento, come sottolinea Marazzini, lo scopo di questi dizionari «è comunque l'insegnamento del toscano, non del dialetto, che resta semplicemente il punto di partenza per arrivare alla voce in lingua»³⁸, molto differenti erano le motivazioni sottese ai lavori ottocenteschi. A partire dall'interesse romantico per la cultura popolare che comportava una nuova dignità e una forte curiosità per la parlata locale. Anche in questa occasione il contributo degli editori fu importante con una particolare attenzione da parte di quelli piemontesi come Pomba, che nel 1859 stampava il *Grande dizionario piemontese-italiano* di Vittorio di Sant'Albino, o come il nizzardo, ma trapiantato a Torino, Maurizio Guigoni che, anche se il progetto non andò a buon fine, fu capace di proporre a Tommaseo un *Dizionario metodico comparato* della lingua e dei dialetti d'Italia. In breve tempo ogni regione e molte città ebbero il loro dizionario che declinava in modo diverso il rapporto tra purismo e dialetto – ad esempio il *Vocabolario domestico napoletano e toscano* di Basilio Puoti o il *Dizionario del dialetto veneziano* di Giuseppe Boerio del 1829 (ristampa anastatica Firenze, Giunti 1998) con un curatore d'eccezione come Daniele Manin³⁹ – ma che

³⁵ M. Bellina, *Girolamo Tagliacucchi, Luigi Angeloni e le origini della lessicografia puristica ottocentesca*, «Studi linguistici italiani», vol. 13, 1987, pp. 40-62.

³⁶ Su questo tema si rinvia a P. Zolli, *Bibliografia dei dizionari specializzati italiani del XIX secolo*, Firenze, Leo S. Olschki, 1973.

³⁷ Sul vocabolario Fanfani-Arlèa cfr. Vitale, *L'oro nella lingua*, cit., pp. 541-553.

³⁸ Marazzini, *L'ordine delle parole*, cit., p. 312. Più in generale M. Cortellazzo, *I dialetti e la dialettologia in Italia (fino al 1800)*, Tübingen, Narr Verlag, 1980.

³⁹ A. Caracciolo Aricò, *Per la storia dell'edizione del Dizionario del dialetto veneziano di Giuseppe Boerio*, in F. Bruni, C. Marcato (edd.), *Lessicografia dialettale. Ricordando Paolo Zilli. Atti del Convegno di studi, Venezia, 9-11 dicembre 2004*, Roma-Padova, Antenore, 2006, Vol. I, pp. 167-171.

soprattutto poneva il problema della relazione tra la voce dialettale registrata dal vocabolario e la corrispondente voce italiana. Una questione che non cesserà con l'Ottocento di appassionare e dividere gli studiosi⁴⁰.

Claudio Marazzini con *L'ordine delle parole* racconta una storia ricca di tensioni, dove lo scontro tra modelli culturali diversi finiva per coinvolgere la rivalità tra città e regioni e dove le discussioni normative rendevano ancora più stringente il rapporto tra lessicografia, progresso e istanze civili. Un complesso e multiforme approccio che trova un ampliamento di orizzonte e un significativo approfondimento nel volume *Filologia e identità nazionale* di Francesco Sberlati. Dei cinque interessanti capitoli di cui si compone il libro concentreremo la nostra attenzione soprattutto sul terzo che riprende anche il titolo dell'opera⁴¹. È infatti nell'arco temporale scelto dall'autore, 1860-1900, che gli studiosi di linguistica e di filologia spesero il loro maggiore impegno nella ricerca di una comune tradizione capace di diventare canonica dando un senso unitario alla storia culturale della nazione. In questa difficile selezione di testi, come pure nella realizzazione di un nutrito numero di opere letterarie, si verificò, per la prima volta nella storia italiana, l'esigenza per cui «la lingua divenne materia sottoposta a disciplina legislativa, ovvero subordinata a scelte di indirizzo politico». Insieme a questa subordinazione, Sberlati individua nel connubio con la letteratura l'altra grande questione che finiva per rintracciare la tradizione di una lingua scritta in modelli già esistenti. Ne sono testimonianza gli appassionati dibattiti e le decise prese di posizione di numerosi intellettuali coinvolti in prima persona in una discussione che non risparmiava polemiche astiose e rotture irrecuperabili da parte di uomini del Risorgimento ancora coinvolti in forti e dolorose scelte di campo. Le pagine dedicate a Pietro Fanfani, Luigi Settembrini, Luciano Scarabelli, sono quanto mai rilevatrici dei compiti diversi che questi intellettuali intendevano dare all'uso della lingua, ma allo stesso tempo indicano la necessità anche per lo studioso contemporaneo di una scelta di campo e di una discussione senza pregiudizi. Un compito al quale Sberlati non si sottrae quando, a proposito di Fanfani, sottolinea la coerenza della sua lettura puristica e la tenacia nel difendere le posizioni, ma in un contesto inadeguato «sul terreno della comprensione storica», per cui la «purezza» ricercata da Fanfani «appare dipendere da un'ideologia datata, solcata da troppe rughe per essere funzionale alla rinnovata concordia linguistica della

⁴⁰ R. Coluccia, *L'italiano nei dizionari dialettali. La pressione sulla voce e le modalità della glossa*, in F. Bruni, C. Marcato (edd.), *Lessicografia dialettale. Ricordando Paolo Zilli*, cit., Vol. II, pp. 557-589.

⁴¹ Il volume, dedicato alla memoria di Domenico De Robertis, raccoglie saggi già apparsi in altre occasioni. Solo il terzo capitolo sul quale concentriamo la nostra attenzione, è inedito. I capitoli quarto e quinto (*L'arcangelo e i grammatici. Antonio Gramsci storico della lingua e Rinascimento controverso. Sfortune di Burckhardt*, pp. 269-301 e 302-341) esulano dai motivi della nostra recensione.

nazione riedificata»⁴². Osservazioni che rinviano alle contemporanee ferme repliche alle posizioni puristiche contenute nelle *Lezioni di letteratura italiana* scritte dal napoletano Luigi Settembrini avversario dichiarato di «un parlato quotidiano geograficamente limitato a una sola città». Anche in questo caso Sberlati sa leggere oltre i toni tribunizi di Settembrini, la sua impostazione tesa a riaffermare la concezione romantica dei dialetti e l'«eterogeneo assemblaggio di vicende e personaggi» della sua storiografia letteraria per rendergli atto del «più penetrante tentativo di ripristinare l'identità smarrita dei regnicoli meridionali»⁴³. Ma è soprattutto nelle pagine dedicate al trapanese Alberto Buscaino Campo che Sberlati rintraccia tutta la ricchezza di un apporto problematico in cui viene rappresentato il «disagio diffuso largamente nell'Italia meridionale, dove le differenti varietà linguistiche rappresentavano uno degli ostacoli più forti alla diffusione della lingua nazionale»⁴⁴. Prendendo in considerazione i vari approfondimenti di Buscaino Campo⁴⁵, Sberlati vi avverte sia l'aspirazione a migliorare «il linguaggio della gente perbene», sia la volontà «di impegnarsi in un percorso di educazione linguistica dal quale dipende la dignità culturale di coloro che vivono nelle province estreme del regno». Seguendo queste linee l'attenta riflessione dedicata al Manzoni linguista, con un'adesione alle sue teorie dichiarata apertamente a Policarpo Petrocchi, non pregiudica in Buscaino Campo «la convinzione che sia necessario tenere separata la “lingua del popolo” da “quella degli scrittori”, intese come due articolazioni autonome». Sottolineature e osservazioni che Sberlati non lascia cadere riscontrando sempre nelle pagine dello studioso siciliano la tensione storica e una parallela ansia politica, sia quando insiste sui limiti della politica

⁴² Nelle pagine dedicate a Fanfani (*Filologia e identità nazionali*, cit., pp. 117-121) Sberlati si sofferma anche sul suo lavoro di filologo a cui era affidato «il compito di riconquistare la “purezza” perduta e di proteggerla da disarticolati sragionamenti». In questo sforzo Fanfani «rivendicava lo studio del passato, nel quale ha profuso tanta passione ed energia, come uno strumento per salvare la lingua dalle tensioni della realtà, e forse anche, in estrema sintesi, per sottrarla al divenire storico che per lui significa deperimento, contaminazione con l'“uso del contado”, accidentale e logorante ammodernamento». Su Fanfani linguista e lessicografo cfr. F. Marri, *Pietro Fanfani*, «Otto/Novecento», vol. 3, 1979, pp. 253-303.

⁴³ Per un confronto tra le posizioni di Fanfani e quelle di Settembrini cfr. P. Fanfani, *Dialogo. Cesare e Pietro*, inserito in P. Fanfani, C. Arlia, *Lessico dell'infima e corrotta italianità*, Milano, Carrara, 1877 (poi 1881 e 1890), pp. XII-XXVI, e L. Settembrini, *Lezioni di letteratura italiana*, Napoli, Ghio, in tre volumi pubblicati nel 1866, 1868, 1872. Su questa opera si veda E. Biagini, *La storiografia letteraria. Emiliani Giudici, Cantù, Settembrini*, in *Storia della letteratura italiana*, diretta da Enrico Malato, 9: *Il secondo Ottocento*, Roma, Salerno, 1998, pp. 671-676, e più in generale, E. Giammattei, *La cultura della regione “napolitana”. I modelli, le forme, i temi*, in *Storia d'Italia, Le Regioni: La Campania*, a cura di P. Macry e P. Villari, Torino, Einaudi, 1990, pp. 791-839.

⁴⁴ Cfr. G. Alfieri, *L'«italiano nuovo». Centralismo e marginalità linguistici nell'Italia unificata*, Firenze, Accademia della Crusca, 1984.

⁴⁵ A. Buscaino Campo, *Studi di filologia italiana*, Palermo, Tipografia del Giornale di Sicilia, 1877; Id., *Appendice agli studi di filologia italiana*, Palermo, Vena, 1889; Id., *Prose varie*, Palermo, Vena, 1889.

culturale postunitaria, sia quando sollecita una maggiore attenzione verso gli esiti spesso nefasti di una applicazione verticistica della lingua toscana⁴⁶. Una lucida e puntuale lungimiranza, quella di Buscaino Campo che tuttavia poi dovrà scontare l'acerrima resistenza delle realtà sociali e culturali più conservatrici⁴⁷.

La discussione sulle posizioni di Buscaino Campo non si esaurisce, comunque, nella lettura dei suoi scritti, ma continua, nel saggio di Sberlati, anche nelle pagine successive quando l'autore riprende l'approfondimento delle posizioni di Pietro Fanfani e di Costantino Arlia, mettendole a confronto con quelle di Policarpo Petrocchi, «il linguista più idoneo a fare della teoria manzoniana un oggetto di studio e non di decreti legislativi». I problemi affrontati sono gli stessi ma, sottolinea Sberlati, la loro soluzione «dimostra una sistematica divergenza di impianto e di metodo». Al «messaggio di conservazione» portato avanti da Fanfani, Petrocchi, che non dimentichiamo aveva proprio in Buscaino Campo un ammiratore, reagiva con una scelta opposta «caricandola perdipiù di significato politico-culturale»⁴⁸. In lui permaneva la convinzione di una cesura difficilmente colmabile tra la concezione preunitaria della lingua e la superiorità del linguaggio vivo⁴⁹. Per cui Petrocchi, secondo Sberlati, in questo accostamento al bilioso purista, «appare il primo filologo al servizio della nazione laddove Fanfani resta il vecchio filologo al servizio del letterato». Non sarà certo un caso se il pistoiese Petrocchi dopo essersi dedicato al *Novo dizionario della lingua italiana*, che ebbe un lusinghiero successo «presso quei ceti che aspirarono a parlare e scrivere un italiano corretto», si impegnerà a fondo nella produzione di libri scolastici, tanto che manuali, antologie, grammatiche, pubblicate a Milano da Agnelli, Boniardi Pagliani, Trevisini, Treves, Vallardi, finiranno per dare «un contributo decisivo all'irradiazione nelle scuole di ogni ordine e grado, di un nuovo metodo di insegnamento della lingua, perfettamente coerente con il suo impegno di lessicografo, e in sintonia con una concezione moderna delle forme espressive»⁵⁰.

Con De Amicis e Pascoli, ma sono anche da rileggere le pagine dedicate a Graziadio Isaia Ascoli⁵¹, Francesco D'Ovidio, Alessandro D'Ancona,

⁴⁶ Sugli intrecci tra filologia e politica cfr. A. Sole, *Alberto Buscaino Campo filologo e critico*, in Id., *Tre momenti di cultura sicilianistica dell'Ottocento. Alcozer, Perez, Buscaino Campo*, Palermo, Palumbo, 1991.

⁴⁷ Si veda Sberlati, *Filologia e identità nazionale*, cit., pp. 138-154, su alcuni limiti della sua proposta cfr. p. 153 e, per un paragone tra le posizioni di Buscaino Campo e quelle di Settembrini, quanto scrive sempre Sberlati alle pagine 154-159.

⁴⁸ Per un confronto tra Fanfani e Petrocchi si veda V. Della Valle, *La lessicografia*, in L. Serianni, P. Trifone (edd.), *Storia della lingua italiana*, 1: *I luoghi della codificazione*, Torino, Einaudi, 1993, pp. 83-87.

⁴⁹ Una discussione sulla figura e l'opera di Petrocchi in P. Nanni, *Policarpo Petrocchi grammatico*, «Studi di grammatica italiana», vol. 18, 1999, pp. 437-457; Ead., *Policarpo Petrocchi e la lingua italiana*, Firenze, Cesati, 2001.

⁵⁰ Sberlati, *Filologia e unità nazionale*, cit., pp. 167-176.

⁵¹ Su Ascoli, ma il discorso si allarga a Napoleone Caix, Francesco D'Ovidio e Alessandro D'Ancona, si veda il paragrafo «*Muffosi puristi*», in Sberlati, *Filologia e identità nazionale*, cit.,

si affrontano problemi e tempi diversi. La lingua italiana si trova davanti a nuove sfide assecondate da una borghesia che vuole sempre di più «parlare un 'italiano italiano', con l'ausilio di libri nutriti di entusiasmo patriottico e insieme di ammiccante socievolezza». E proprio in uno di questi ambienti, quello mondano fiorentino di stampo moderato vicino alla destra storica, De Amicis trovò la preziosa occasione di ampliare i suoi orizzonti culturali sino alla stesura, nel 1905 per Treves, de *L'Idioma gentile*: un volume dove «la proposta manzoniana è intesa come utopia realizzabile all'insegna della moderazione». Analizzando, con acute osservazioni, le proposte avanzate da De Amicis, Sberlati si sofferma soprattutto sulla più volte riasserita superiorità del fiorentino e sulla necessità di conseguire una corretta pronuncia da parte dei non toscani. Affermazioni legate da un parte alla volontà di sottrarre la questione della lingua ad una «copertura ideologica» imposta, o meglio sovrapposta, dall'unificazione sabauda, dall'altra dalla impossibilità di prescindere dallo strumento librario «senza il quale sarebbe impensabile l'incisività della proposta manzoniana»⁵². In questa prima dislocazione dei problemi, Sberlati insiste nel leggere l'ostilità di De Amicis verso il dialetto nativo non come volontà di sopraffazione, ma come espressione di esigenza di una coesione sociale che non potrà essere ottenuta sino a quando la lingua comune veniva recepita come espressione artificiosa. La consonanza con le posizioni di Buscaino Campo, come pure l'interesse per un moderato purismo⁵³, mettevano in evidenza, nella riflessione di De Amicis, la consapevolezza di un possibile iato nella evoluzione linguistica tra classi diverse, tra proletariato urbano e contadini. Ecco perché, a tale proposito, Sberlati insiste sull'inserimento da parte di De Amicis, della proposta manzoniana in un coerente schema politico capace di destare maggiore attenzione verso il «carattere 'orale' della lingua», verso «una rivalutazione dell'elemento comunicativo su quello retorico»⁵⁴.

Nel Novecento sarà Pascoli «a spostare l'attenzione dall'oggetto della lingua all'esperienza che ne permette l'assimilazione», e sarà attraverso lo studio del suo

pp. 182-209. Più in generale G. Lucchini, *Le origini della scuola storica. Storia letteraria e filologia in Italia (1866-1883)*, Bologna, il Mulino, 1990 (ora in edizione rivista: Pisa, ETS, 2008); Id., *Ascoli: appunti per una biografia. Dalla linguistica comparata alla storia della lingua italiana*, in G.I. Ascoli, *Scritti sulla questione della lingua*, a cura di Corrado Grassi, Torino, Einaudi, 2008, pp. VII-LXIV; S. Morgana, A. Bianchi Rabbiati (edd.), *Graziadio Isaia Ascoli «milanese». Giornate di studio 28 febbraio-1 marzo 2007*, Milano, LED, 2009.

⁵² Cfr. anche E. Tosto, *Edmondo De Amicis: la lingua si studia*, «Rassegna della letteratura italiana», vol. 104, n. 1, 2000, pp. 91-106; Id., *Edmondo De Amicis e la lingua italiana*, Firenze, Leo S. Olschki, 2003.

⁵³ E. Benucci, *Edmondo De Amicis e l'Accademia della Crusca*, «Lingua nostra», vol. 67, n. 3-4, 2006, pp. 100-112.

⁵⁴ Concludendo il suo discorso su De Amicis, Sberlati scrive: «Nel solco di Manzoni, De Amicis ha forse composto il miglior libro destinato alla scuola secondaria: non un manuale di ortografia e grammatica in cui si ritrovano le riflessioni dei filologi più avveduti, né le controversie intorno all'eccellenza del fioretto: il fine dell'*Idioma gentile* è di tipo pratico, ossia spiegare "come apprendere la lingua viva e familiare"», in *Filologia e identità nazionale*, cit., p. 233.

lavoro di filologo e linguista che si potrà cogliere il lento ma inesorabile incrinarsi del «solido edificio eretto dal razionalismo manzoniano». L'antologia *Fior da fiore* pubblicata nel 1901 presso l'editore Remo Sandron, «un imprenditore del libro tanto innovativo quanto ambizioso» come lo definisce Sberlati avendo poi parole convincenti sulla sua produzione⁵⁵, è un inconsueto, anche per mole, progetto, dove più che sulla aulica fiorentinità trasportata dalla letteratura nel discorso storiografico «si sottolinea il carattere aulico di una interregionalità idiomantica». È il segnale di una «disgiunzione» Manzoni – Pascoli che sottolinea una visione diversa della storia letteraria dove, proprio nell'allestimento della antologia, «Pascoli sovrappone alla prospettiva manzoniana un orientamento volto a tutelare le specifiche caratteristiche regionali». La stessa struttura di *Fior da fiore* comporta una forte accentuazione di tutti quegli elementi non riconducibili alla fiorentinità e una articolazione e partizione «dove vengono accorpati testi affini per registro di lingua e di stile»⁵⁶. D'altra parte, e anche in questo caso le osservazioni di Sberlati sono quanto mai appropriate, l'antologia nasce in un contesto culturale generale di novità e aspettative e anche all'interno di una profonda riflessione delle proprie esperienze istituzionali. Nel primo caso bisognerà ricordare come l'anno prima della pubblicazione dell'antologia pascoliana Sandron stampava *L'insegnamento della filosofia nei licei* che iniziava l'impegno di Giovanni Gentile nel campo della pedagogia scolastica, per il secondo non si può non sottolineare che nel lavoro di ricerca e riordino per il nuovo testo Pascoli riportava il suo importante contributo dato nel biennio 1894-1895 ai lavori delle commissioni ministeriali per i libri di testo voluta da Ferdinando Martini.

⁵⁵ Scrive Sberlati: «Alla base dell'attività editoriale di Sandron si riconosce un progetto educativo veramente nazionale, portato avanti con coerenza e responsabilità, nel quale si riflette l'immagine di una nazione unitaria e devota agli studi», e cita dal catalogo della casa editrice i tanti sussidiari di storia, geografia, grammatica, in *Filologia e identità nazionale*, cit., p. 235.

⁵⁶ Dell'antologia *Fior da fiore. Prose e poesie scelte per le scuole secondarie inferiori*, Palermo-Napoli, Sandron, 1901, si dispone ora di un'edizione moderna curata da Caterina Marinucci per Pàtron, Bologna, 2009. Analisi sui criteri dell'antologia in E. Salibra, *Modelli letterari e modelli linguistici nelle antologie italiane di Giovanni Pascoli*, «Soglie», n. 1, 2004, pp. 23-61; M. Colin, *Pascoli entre «alumni» et «fanciullini». Pédagogie et poétique dans ses anthologies pour les écoles*, «Transalpina», vol. 10, 2007, pp. 197-214, S. Martini, *Da Carducci antologista a Pascoli antologista*, «Studi e problemi di critica testuale», vol. 73, n. 1, 2003, pp. 129-161.

From *nature guiding* to *nature interpretation* in the United States (1872-1920).

The origins of the professional practice of heritage interpretation: between protection and education*

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ABSTRACT: Born and raised as 'nature guiding' for visitors to North-American parks and reserves, the professional practice of *heritage interpretation* – as it is nowadays well-known at international level – is analysed here by comparing the writings and actions of the founding fathers of this practice, particularly of John Muir (1838-1914) and Enos Mills (1870-1922), along with the thought and work of some contemporary American influential educationalists and educators. In order to shed light on the very pedagogical roots of this practice, the article aims to retrace, in the historical context of the time, the most crucial connections between the birth of 'interpretation' and the claims of educational renovation, especially embodied by the Pestalozzi's object lesson or the *Nature-Study Movement*, claims which were emerging in American society and culture between the last two decades of the XIX and the beginning of the XX centuries.

EET/TEE KEYWORDS: Environmental Protection; Environmental Education; Experiential Learning; Discovery Learning; Informal Education; USA; XIX-XX Centuries.

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Foreword

The expression *Heritage Interpretation* denotes a professional practice which is now widespread in environmental and cultural heritage sites and is principally aimed at «establishing a link between visitors and what they can discover at a nature reserve, a historic site or a museum» – given its nature of «structured approach to non-formal education that is specialised in communicating significant ideas about a place to people on leisure», as recently defined by the *European Association for Heritage Interpretation*, which gathers professionals in this field throughout Europe¹. Originated from the «nature guiding» activities for visitors which began to establish themselves in the ambit of the North-American parks and reserves since their first establishment in the second half of 19th century (to 1872 dates back the foundation of Yellowstone, the first national park in the world), the professional practice of *interpretation* – and, along with it, the professional role of the *interpreter* – has been further developed thanks to the actions undertaken and roles played by significant figures such as the naturalist and conservationist John Muir (1838-1914), the environmental guide and interpreter Enos Mills (1870-1922) and finally by the ‘father of interpretation’, Freeman Tilden (1883-1980), whose work *Interpreting our Heritage* (1957)² is still considered a fundamental and inspiring point of reference for all professionals now working in the field of both environmental and cultural interpretation. By retracing the cultural background especially of late nineteenth-century United States, along with a re-examination of the actions and writings of the above mentioned figures in the light of the thought and work of some contemporary influential educationalists and educators, this work seeks to illuminate some crucial connections with the claims of educational renovation which were emerging in American society and culture of the time, in order to highlight the very pedagogical roots of this practice, which Tilden himself first defined in 1957 an «educational activity which aims to reveal meaning and relationships through the use of original objects, by first hand experience and by illustrative media, rather than simply to communicate factual information»³.

¹ See the presentation and definitions provided in the Association’s website: <<http://www.interpret-europe.net/top/heritage-interpretation.html>> (last access: September 2nd, 2012).

² F. Tilden, *Interpreting our heritage*, Chapel Hill, The University of North Carolina Press, 1957. The edition consulted is the Fourth edition expanded and updated, ed. by B. Craig, with foreword by R.E. Dickenson (Chapel Hill, The University of North Carolina Press, 2007).

³ Tilden, *Interpreting our heritage*, cit., p. 33.

The rise of 'nature guiding' in the cultural background of the late nineteenth-century United States

Heritage interpretation – intended as a philosophy and a practice consisting of a set of communicational and management techniques and procedures for guiding visitor to heritage sites, nowadays standardised and well-known at international level – is deeply rooted in a specific historical, political, geographical and cultural context. Around the middle of the 19th century in the United States strong attention and public interest arose which were focused on the issues of the protection of the national territory – attention and interest which were the expression of several differentiated cultural and political influences.

On the one hand, a real cult of naturalism was surely kindled by the 'frontier myth' and by the spirit of adventure which prompted the settlers to the discovery of the wild and uncontaminated West. In the footsteps of the settlers the governmental geographical explorations also moved which in the second half of the nineteenth century contributed to outline the boundaries and the shape of a new nation that, looking for a foundation on which to base and recognize her own national identity, seemed to have found it in the extraordinary richness and wonders of her natural landscape⁴. On the other hand, the love of nature observation, combined with a typically nineteenth-century positivist scientific curiosity, fitted perfectly with the ideals and values of American Transcendentalism, which found in the New World a very receptive and fruitful cultural background. Transcendentalists in fact – through the charismatic figures of Ralph Waldo Emerson and his disciple Henry David Thoreau⁵ – by transplanting German Idealism and European Romanticism onto American soil, grasped the Sublime and the very deeply religious meaning of human existence in the contemplation of the sublime and untouched American landscapes and natural settings: the *wilderness*, or rather the wildness, as Thoreau called it,

⁴ On the *cult of naturalism*, which was shared by governmental explorers as well as artists and naturalists in their progressive discovery and 'appropriation' of the American continent, see W.H. Goetzmann, *Exploration and empire: the explorer and the scientist in the winning of the American West*, New York, Knopf, 1966 and now B. Novak, *Nature and culture. American landscape and painting, 1825-1875*, 3rd ed., Oxford, Oxford University Press, 2007; on the representation of nature and landscapes as a foundation of national identity for American people see N. Leonardi, *Il paesaggio americano dell'Ottocento. Pittori, fotografi e pubblico*, Roma, Donzelli, 2003.

⁵ A founder of American Transcendentalism, Ralph Waldo Emerson (1803-1882) was called the «philosopher of Nature» because of his appreciation of the role of Nature, considered the first source of knowledge and wisdom for men and, as a revelation of God (*God's garment*), a real bridge between material and immaterial worlds («universal soul»). More than Emerson, the writer Henry David Thoreau (1817-1862) his disciple and friend, became the greatest interpreter of this new feeling for nature that led him to develop an ideal of ascetic life in close contact with the wilderness – an experience that led to the work becoming a timeless classic of environmental literature: *Walden, or Life in the Woods*, Boston, Ticknor & Fields, 1854 (It. transl. *Walden, ovvero la vita nei boschi*). On these topics see A. McMurtry, *Environmental Renaissance: Emerson, Thoreau & the system of nature*, Athens, University of Georgia Press, 2003.

intended as a mental and spiritual state of deep communion with nature, through which man rediscovers himself in the absolute freedom that the so-called civilised society refused him (a view which echoes Rousseau's thought).

The first American philosopher and the forerunner of a philosophy of the environment *ante litteram*, Emerson and Thoreau laid the philosophical and ethical foundations of what would soon become the *Conservation Movement*, which in America saw very early and large-scale development. What might be termed the conservationist philosophy soon began influencing all aspects of American culture, from art (visual arts as well as literature and poetry) to economics, ethics and politics – as testified by the dispute that soon took shape within the Conservation movement: on the one hand, *preservationists*, inheriting the Emerson ideal of an intrinsic, i.e. spiritual and transcendental, value of nature, fought to protect the wild from the damaging contagion of destructive civilization; on the other, *conservationists*: subordinated environmental protection to the development of civilisation, seeing conservation as a tool for the careful management of natural resources according to the needs of mankind⁶.

This dispute, not only of philosophical nature but, clearly, also political and economic as well, was emblematic of how deeply rooted was this issue in society and culture of the time. This particular historical and philosophical context represented a key contributory factor leading to the birth of public interest in protection of natural areas, as well as the emergence of the first forms of environmental, historical and cultural tourism and the related initial examples of *environmental interpretation* – and all of this thanks to the influence of figures who played decisive roles in one or the other domain. Throughout the nineteenth century, in fact, the first widespread forms of environmental tourism flourished in North-America: admiration and respect for nature soon merged with cultural and nationalistic instances which led to the rise of the so-called *American Grand Tour* – a sort of patriotic pilgrimage to discover the identity of a nation which was emerging but which was also ready to acknowledge her history and roots in the untouched beauty of her immense natural heritage. Suffice it to think of the symbolic, patriotic and even sacred meaning that a spectacular location such as Niagara Falls had taken in the imagination of a people who – still lacking a strong tradition of national identity, was constantly in search of «sacred places» in which to recognize itself⁷. At the same time, the progressive development of the railway network

⁶ On these opposing currents within the *Conservation movement*, and on the consequent 'clash' between the respective leaders John Muir and Gifford Pinchot cfr. *infra*, the paragraph: *John Muir (1838-1914): il naturalista interprete*. For a first panorama on conservationists, preservationists and utilitarian environmentalism see J. Rodman, *Quattro forme di coscienza ecologica*, in *Etiche della terra: antologia di filosofia dell'ambiente*, ed. by M. Tallacchini, Milano, Vita e Pensiero, 1998, pp. 315-329.

⁷ On the symbolic meaning of Niagara Falls, clearly visible in the testimonies of contemporary art and literature see E.R. McKinsey, *Niagara Falls: Icon of the American Sublime*, New York, Cambridge

in the late 19th century, and especially the construction of the Transcontinental, facilitated not only the connections and the transport of goods and people from coast to coast, but stimulated an increasing stream of visitors towards the first locations of some interest for tourism, mainly of an environmental nature. The combination of these diverse elements, therefore, resulted in the early emergence of a particular attention to environmental heritage and, as a consequence, in the first environmental policies that led to the establishment of the first wildlife reserves controlled by state and federal authorities.

Between 1864 and 1885, in fact, in the United States the first protected areas in history were founded: in 1864 the federal government, through president Lincoln, enacted the *Yosemite Grant*, establishing the first reserve in the nation, the Yosemite Park (later elevated to the status of state park and finally national park, in 1890); in 1885, Niagara Falls also came under governmental protection through the foundation of the *Niagara Reservation State Park* by the State of New York (April 30, 1885) and, on Canadian soil, of the *Queen Victoria Niagara Falls Park* by the Canadian Government. But it was on March 1st, 1872, that a formal act of Congress established – «as a public park or pleasuring-ground for the benefit and enjoyment of the people» – the first national park in the U.S. and in the world, Yellowstone⁸.

A recent essay⁹ on the history of visitor services in the Yellowstone National Park has retraced the origins of the interpretive practice in the activities of «storytelling» – intended as «the art of telling people about the wonders and attractions of a geographical area, that is, giving them information and provocation about a place so that they can more fully enjoy it»¹⁰ – which were stably implemented right from the establishment of the park in the decade 1870-1880¹¹. Yellowstone, in fact, was not only the first national park but it

University Press, 1985; J.F. Sears, *Sacred Places: American tourist attractions in the nineteenth century*, New York, NY., Oxford University Press, 1989; P.V. McGreevy, *Imagining Niagara: the meaning and making of Niagara Falls*, Amherst, MA., University of Massachusetts Press, 1994.

⁸ On the history of American parks see in general A. Runte, *National Parks: the American experience*, 3rd ed., Lincoln, NE., University of Nebraska Press, 1997 and Id., *Public lands, public heritage. The national forest idea*, Niwot (Colorado), Roberts Rinehart Publishers, 1991. This, and further, bibliography is accessible in the digital library of the National Park Service's website, <<http://www.nps.gov>>. The integral text of the *Act creating Yellowstone National Park*, March 1, 1872 (Enrolled Acts and Resolutions of Congress 1789-1996, General Records of the United States Government Record Group 11, National Archives) is accessible online on the governmental website *Our Documents*, <<http://www.ourdocuments.gov/>> (last access: February 27th, 2012).

⁹ L.H. Whittlesey, *Storytelling in Yellowstone: horse and buggy tour guides*, Albuquerque, University of New Mexico Press, 2007 (about the unwritten history of *storytelling* in relation to the origins of *park interpretation* see, in particular, the pp. 1-10).

¹⁰ *Ibid.*, see the citation from p. 1. The art of *storytelling* is contextualized in the scenario of the emerging north-American tourism along with the real “legend” of Yellowstone – which was soon to dominate the collective imagination for its exceptional beauty, for its capacity to represent the sentiments and the profound need that the American people had for recognition – it played an important role in affirming the vision of the «West» as a tourist destination and in the development of an interconnected and important economic network.

¹¹ On the various «storytellers», «lecturers» and early «park interpreters» of Yellowstone –

emerged as the first tourist destination for the American people at a time when the progressive development of communication lines was giving great impetus to the first forms of popular tourism, on the one hand; and on the other, in the immediate historical aftermath of the Civil War, it represented for the American people the first real ‘national monument’ with which to identify themselves after the rediscovered unification. No wonder, therefore, in this context, if we find that Yellowstone park was the first where visitors could avail themselves of tour guides devoted to the art of storytelling «for the benefit and enjoyment of the people» (as mentioned in the founding act of the park). Such ‘service’ was primarily aimed at entertaining tourists with the recounting of anecdotes and wonderful stories (including Indian legends and so on) in order to reveal the magnificence and beauty of those places to visitors. But at the same time it cannot be denied that the «storytelling» ended up achieving the same objectives that are being pursued today by environmental interpretation in reserves, that is: help the public enjoy the visit, develop visitors’ sensitivity toward the issue of preserving the natural and cultural treasures of the park and finally, as a direct consequence, promote and preserve the park itself. Therefore, if for the nineteenth-century American tourists «the [European] grand tour was a lesson in time and antiquity», the *American Grand Tour* stood out for its magnificent «lessons in nature»¹², of which Yellowstone soon came to represent the epicentre. In the light of these elements, the birth of the first embryonic but stable forms of guidance and interpretation of environmental and cultural sites can be traced back to the very founding of Yellowstone Park, revealing a tradition that was even more significant and rich with cultural reference.

Fuelled by these important results, the increasing impetus toward conservation and environmental protection saw the further establishment of other national parks (in 1890 Sequoia and Yosemite, both in the state of California; in 1899 Mount Rainier, in Washington state; and many more during the 1900s) as well as several national forests and protected areas, both natural and historical. This path significantly culminated, on 25th August 1916, with the creation of the *National Park Service* (NPS)¹³, a governmental body reporting directly to the Ministry of the Interior, and which assumed the task of coordinating and managing the remarkable environmental, historical and cultural heritage of the nation.

It is within this general conservationist movement that the birth of ‘heritage interpretation’ took place – intended as a first form of *nature guiding* activities targeted at the American public and aimed at the discovery, understanding and recognition of the value of the natural heritage of the nation. In 1920 these activities of guiding and accompanying the ‘tourists of nature’ were now

the latter recognized by Whittlesey, and not by chance, in the park superintendents Philetus Walter Norris (1821-1885) and George Henderson (1827-1905) – see *ibid.*, pp. 107-166.

¹² *Ibid.*, p. 3.

¹³ For further information on the history of the NPS refer to the institutional website, <<http://www.nps.gov>>.

so widespread and developed in the reserves and national parks, that it was decided to establish an organ for controlling and coordinating them within the National Park Service itself. For this purpose in 1923 a special Educational Division¹⁴ was created, that would provide a great and significant boost to the figure and work of *nature guides* and *nature interpreters*, so much so that the literature on the history of interpretation traditionally dates the start of the practice back to this period¹⁵.

In conclusion, the decade 1910-'20 not only witnessed the consolidation of the first U.S. state conservation policies and the emergence of the NPS, but also saw the promotion, within its structure, of a series of nature guiding activities for park visitors. This was all thanks to the decisive action and influence of some crucial figures, among whom we find the naturalist-conservationist John Muir (1838-1914) as well as the environmental guide and *interpreter* Enos Mills (1870-1922), who both played an equally crucial role in the history of conservation as well as in the history of interpretation. Nevertheless, the origins of the unique communicational and educational approach underlying nature interpretation are rooted, as already mentioned, in a broader cultural, political, economic and philosophical as well as pedagogical and historical-educational (as we will see) background, which is prior to the birth itself of NPS. To better understand the principles underlying interpretation, let us retrace the ideas and the work of the leading figures of the historical phase (between the 19th and 20th centuries) and of the broad cultural movement outlined so far, within which the interpreter's role and mission took shape. Among those protagonists the figures who stand out are those of early naturalists and conservationists (such as John Muir), of travellers and environmental guides (such as Enos Mills), but also of botanists, natural science educators and educational reformers (such as Luis Agassiz, Liberty Hyde Bailey, Anna Botsford Comstock, Edward A. Sheldon). Thanks to all these people attention and awareness grew towards issues, which were different but closely intertwined, such as the importance of preserving heritage, the value of the study of nature and the teaching of science in reforming education and society, and finally the central role of cultural and environmental heritage in affirming national identity.

¹⁴ W.J. Lewis, *Interpreting for park visitors*, Ft. Washington, Eastern Acorn, 1995, p. 17. For a general outline on the history of interpretation, before and after the birth of NPS, see in particular C.F. Brockman, *Park Naturalists and the Evolution of National Park Service Interpretation through World War II*, «Journal of Forest History», vol. 22, n. 1, January 1978, pp. 24-43 and B. Mackintosh, *Interpretation in the National Park Service. A Historical Perspective*, Washington D.C., U.S. Department of the Interior, History Division National Park Service, Department of the Interior, 1986, <http://www.nps.gov/history/history/online_books/mackintosh2/index.htm> (last access: September 8th, 2012).

¹⁵ On the origins of interpretation as *nature guiding* see H.E. Weaver, *Origins of interpretation*, in G.W. Sharpe (ed.), *Interpreting the environment*, New York-London-Sydney-Toronto, J. Wiley and Sons, 1976, pp. 29-47; T. Merriman, L. Brochu, *The history of heritage interpretation in the United States*, Forth Collins CO., The National Association for Interpretation, 2006.

John Muir (1838-1914): the naturalist-interpreter

John Muir, emigrated from Scotland and raised in Wisconsin, was a famous self-taught naturalist and a tireless activist in the conservation movement. During his many travels, Muir settled for some years (from 1868 to 1873) in the California region of Sierra Nevada, where he was charmed by the Yosemite Valley – which had been a protected area since 1864. Here Muir made observations and conducted scientific research, which led to the formulation of innovative theories on glacial motion and the subsequent formation of valleys. He also studied the ecology of giant sequoias.

But equally remarkable was his fight for the conservationist cause. With his many writings, of both scientific and popular nature, he did much to draw attention to the beauty and importance of many natural areas, including the Yosemite – which was declared a national park in 1890. In the following years, several national parks, forests and monuments (suffice it to mention the Petrified Forest, or the Grand Canyon) were established thanks to the efforts of Muir in his role as a scientist, writer and populariser. Whilst the creation of these sites should certainly be attributed to the sensitivity and **foresightedness** of the political class of the time, in particular of the ‘conservationist president’ Theodore Roosevelt¹⁶, there is no doubt that such pervasive attention towards environmental heritage was also due to Muir – who in 1892 founded the first American environmental organization, the Sierra Club¹⁷, and was the promoter of the nascent American conservationist movement. Muir’s personality and his conception of the *Wilderness* clearly stood out in the events of the Conservation movement itself, within which opposite positions soon arose concerning the ethical and philosophical vision of the environment – considered by some as a heritage to be safeguarded untouched, and by others as a resource to be preserved and used for the benefit of mankind for as long as possible. In 1897 the irreconcilable opposition between the two trends – the one led by Muir, and the other by his former friend and ally Gifford Pinchot (moreover a prominent figure, as head of the U.S. Forest Service) – led to the definitive split between ‘utilitarian’ and ‘purist’ conservationists, the latter being embodied by Muir and his followers. This vision of the wild would incessantly put forward by Muir: an influential reference point as a writer and populariser, his writings, journals and books had a strong impact on the American public and helped bolster a new public awareness of the intrinsic and spiritual value, rather

¹⁶ On the relationship between Muir and president Roosevelt see in particular: S. Fox, *John Muir and his legacy: the American Conservation Movement*, Boston, Little, Brown and Company, 1981, pp. 183 ff.; P.R. Cutright, *Theodore Roosevelt: the making of a conservationist*, Urbana and Chicago, University of Illinois Press, 1985; and now W. Todd Benson, *President Theodore Roosevelt’s conservation legacy*, Haverford, PA, Infinity Pub., 2003.

¹⁷ About the history of Sierra Club refer to the association’s website which offers a variety of resources on John Muir, such as the John Muir Exhibit, <http://www.sierraclub.org/JOHN_MUIR_EXHIBIT/> (last access: September 7th, 2012).

than material, of environmental heritage – seen as a source of knowledge and a revelation of the deepest meaning of life:

In streams of ice, of water, of minerals, of plants, of animals, the tendency is to unification. We at once find ourselves among eternities, infinitudes, and scarce know whether to be happy in the sublime simplicity of radical causes and origins or whether to be sorry on losing the beautiful fragments which we thought perfect and primary absolute units; but as we study and mingle with nature more, the pain caused by the melting of all beauties into one First Beauty disappears, because, after their first baptismal submergence in fountain God, they go again washed and clean into their individualisms, more clearly defined than ever, unified yet separate¹⁸.

With his testimony of life and his writings – which more than evidently expressed Emerson and Thoreau's influence – Muir helped to shape that 'philosophy of the park' that would lead to the establishment in 1916 (two years after his death) of the National Park Service¹⁹. But at the same time he also laid the first foundations of a vision and of a method that would inspire and kindle the environmental interpretation itself. The entire literature on the history of interpretation, in fact, underlines the usage, that Muir first made in 1871, of the verb «to interpret» – even though intended as 'understanding' and 'penetrating' the secrets of the wild by means of direct, close contact²⁰. In a renowned passage, quoted in all books and manuals on interpretation, we read this citation from a fragment, undated but probably taken from the naturalist's diaries of 1871:

As long as I live, I'll hear waterfalls and birds and winds sing. I'll interpret the rocks, learn the language of flood, storm, and the avalanche. I'll acquaint myself with the glaciers and wild gardens, and get as near the heart of the world as I can²¹.

¹⁸ J. Muir, *John of the Mountains: the Unpublished Journals of John Muir*, ed. by L. Marsh Wolfe, London, University of Wisconsin Press, 1979, pp. 79-80 (the book gathers the diaries from 1867 through 1911).

¹⁹ On John Muir see Fox, *John Muir and his legacy*, cit.; T. Wilkins, *John Muir: apostle of nature*, New York, NY., University of Oklahoma Press, 1995; S.M. Miller, *John Muir in historical perspective*, Frankfurt am Main [etc.], Peter Lang, 1999; G. Ehrlich, *John Muir: nature's visionary*, Washington, DC., National Geographic Society, 2000.

²⁰ Mackintosh, *Interpretation in the National Park Service. A Historical Perspective*, cit., Chapt. 1: *Before the National Park Service*.

²¹ The undated fragment (but traditionally attributed to 1871) comes from one of the *Journals* Muir wrote by gathering drawings, descriptions and miscellaneous notes in the years 1867-1913 (and now preserved in the *John Muir Papers* archival fund at the University of the Pacific Library: <<http://www.pacific.edu/Library/Find/Holt-Atherton-Special-Collections/John-Muir-Papers.html>>). Unfortunately we still do not know exactly which diary originally contained the famous fragment (as personally confirmed by Harold Wood, Chair of the John Muir Education Team of the Sierra Club), and currently the first, and unique, source of this passage can be found in Linnie Marsh Wolfe's book: *Son of the Wilderness: The Life of John Muir*, New York, Alfred A. Knopf, 1945, p. 144 (repr.: Madison, University of Wisconsin Press, 2003).

Muir employs the verb «to interpret», in the same way as «to hear» or «to learn», to mean the deep observation that he led in order to «get near the heart of the world»: interpreting means to listen, observe, penetrate and learn the secrets of the wild, appropriating the deepest sense of life itself. In another passage Muir explains his way of observing and interrogating nature, opening a silent dialogue with the plants and rocks that allows him to understand and learn the history and origins of natural phenomena as a whole:

This was my ‘method of study’: I drifted about from rock to rock, from stream to stream, from grove to grove. Where night found me, there I camped. When I discovered a new plant, I sat down beside it for a minute or a day, to make its acquaintance and try to hear what it had to say. When I came to moraines, or ice-scratches upon the rocks, I traced them, learning what I could of the glacier that made them. I asked the boulders I met, whence they came and whither they were going. I followed to their fountains the various soils upon which the forests and meadows are planted; and when I discovered a mountain or rock of marked form and structure, I climbed about it, comparing it with its neighbors, marking its relations to the forces that had acted upon it, glaciers, streams, avalanches, etc., in seeking to account for its form, finish, position, and general characters²².

Such a «method of study» – which consists of contemplating nature and living beings, listening to plants as well as observing the signs on the earth – leads man to interpret the secrets of the nature and therefore to read the language of a world that manifests itself as a real open book, that is comprehensible to all those who simply decide to stop and read it. It was especially the metaphor of the book («the great open book»), made up of chapters and pages («granite pages»), written by a pen or printed with typographic characters etc., that Muir preferred to explain and penetrate – in a word, ‘interpret’ – for example the signs and traces left by the Yosemite glaciers. Muir writes that some areas of the mountains and valleys of glacial origins are so clear and ‘readable’ to the point that they «proclaim in splendid characters the glorious actions of their departed ice»²³. Or, again: «Glaciers make the deepest mark of any eroding agent, and write their histories in inerasable lines. [...] Glaciers, avalanches, and torrents are the pens with which Nature produces written characters most like our own, and every canyon of the Sierra displays examples of this writing»²⁴.

This method of observation was applied by Muir also when accompanying his guests on excursions, guiding them not only physically along the trails,

²² Muir, *John of the Mountains*, cit., p. 69 (the passage, referring to an exploration carried out in September 1871, first appeared in the article *Explorations in the Great Tuolumne Canyon* for the journal «Overland Monthly» of August 1873).

²³ J. Muir: *Yosemite Glaciers*, in Id., *Nature Writings. The story of my boyhood and youth, My first summer in the Sierra, The mountains of California, Stickeen, Selected essays*, New York, Literary Classics of the United States Inc., 1997, pp. 577 ff. First published in the «New York Tribune» of December 5, 1871, the text is now available online at the cited website <http://www.sierraclub.org/JOHN_MUIR_EXHIBIT/>, section «Writings by John Muir».

²⁴ Muir, *John of the Mountains*, cit., p. 88.

but mainly by leading them to the discovery and understanding of beauty and mysteries of nature. And this ability to interpret nature for visitors was so remarkable that it impressed even distinguished travelling companions, such as the philosopher Ralph Wald Emerson, who met the young Muir in 1871; or Theodore Roosevelt himself: Muir initially led him to fully embrace the park cause in his famous book *Our National Parks* (Boston, New York, Houghton, Mifflin and Co., 1901), and subsequently personally accompanied him to visit the Yosemite Valley in 1903²⁵.

His ability as an *interpreter of nature* was compelling, in fact: when the Sierra Club association decided to offer mountain hikes and summer camps in 1901, the first excursion was led by its president, Muir, and proved so successful that these ‘outings’ had to be repeated each year: the number of members increased considerably and the Sierra Club discovered its vocation, which was not simply to send out a message, but much more ‘educational’ in its ability to reach an audience that was eager to learn about and understand nature. But even before the Sierra Club outings, Muir had led visitors – albeit sporadically – down the Yosemite trails and certainly during these excursions, praised by all the visitors who took part, Muir had doubtlessly instilled that religious and almost mystical sense of nature that emerges from his naturalistic and autobiographical writings, and that embodied one of the characteristic elements of American literature, art and culture²⁶. Thanks to his work, the same elements would pass on to inspire the action of the Sierra Club preservationist movement and, subsequently, would become a shared ideal inheritance for the future leading ecologists Aldo Leopold and Robert Marshall (who founded the *Wilderness Society* in 1935).

But the same philosophical and spiritual conception – clearly borrowed from Emerson’s teaching – was concretely cultivated by Muir and historically contextualized in the culture of the time: in his inspired prose, in fact, the *wilderness* is not only a source of beauty and truth to man, but is also the ‘treasure of the nation’²⁷ for the citizen on the one hand, and on the other, it is good training in scientific knowledge. Indeed, we cannot forget how his writings always show a very strong need to observe, study and ‘interpret’ the higher message hidden in

²⁵ Muir recalls his encounter with Emerson in *Our National Parks*, Chapt. IV: *The Forests of the Yosemite Park*. Cfr. also *The writings of John Muir*, Vol. 9: *The Life & Letters of John Muir*, ed. by W.F. Badè, Boston, Houghton Mifflin, 1923, 2 vols. Encounter narrated also in Vol. I, Chapt. VIII (*Yosemite, Emerson and the Sequoias*); the hike with Roosevelt can be read in Vol. II, Chapt. XVIII (*His Public Service*). The text is freely available both in the Internet Archive, <<http://www.archive.org>>, and in *Yosemite Online*, ©1997-2010 Dan Anderson, <http://www.yosemite.ca.us/john_muir_writings> (last access: September 6th, 2012).

²⁶ About this sort of ‘eco-spirituality’ as a leitmotiv of American culture see J. Gatta, *Making nature sacred: literature, religion, and environment in America from the Puritans to the present*, Oxford, Oxford University Press, 2004.

²⁷ J. Covell, *The heritage of interpretation*, in T. Merriman, L. Brochu, *The history of heritage interpretation in the United States*, Fort Collins, CO., Interpress, 2006, pp. 29-32.

plants, rocks and animals songs – a quality which derived from his former career as a brilliant student of natural sciences at the University of Wisconsin (which he soon abandoned to follow the «University of the Wilderness»)²⁸ and as an inventor of mechanical and scientific devices: in short, the typical nineteenth-century scientist, curious observer and experimenter, as Muir was.

From this love for scientific research, as well as from a pure and deep admiration, respect and sense of communion with nature, finally from the desire to share this knowledge with peers, all the premises were in place which would be crucial first in laying the conceptual foundations for *environmental interpretation*, and then for heritage interpretation.

Liberty Hyde Bailey (1858-1954) and the Nature Study Movement

The birth of the preservationist and conservationist movements along with the first activities of *storytelling*, *nature guiding* and *nature interpretation* on the other hand were rooted within the same cultural background, which also led to the rise of another important movement which fostered an innovative educational ideal based on nature seen as an object of study, as a learning environment and as a source for a new way of teaching as well. We are referring to the *Nature Study Movement* that was developed in the United States in the second half of 19th century around prominent figures of botanists and educators, and presented undeniable and interesting connections with the thought and work of one of the acknowledged founding fathers of *nature interpretation*, Enos Mills²⁹ – as the scholar James R. Fazio had already remarked in the late Seventies³⁰. These connections between the guide and interpreter Enos Mills and the scientist, naturalist and educator Liberty Hyde Bailey – connections now further corroborated by recent studies on the history of *Nature Study Movement* and of natural science teaching³¹ –

²⁸ About Muir's university experience see *The Story of my Boyhood and Youth*, Whitefish, MT., Kessinger Publishing, 2005 (repr. of 1913 edition), pp. 274 ff. The quote is from p. 287). Available online in *John Muir Writings*, <http://www.yosemite.ca.us/john_muir_writings/the_story_of_my_boyhood_and_youth/chapter_8.html>, c2007-2010 Dan Anderson (last access: April 3rd, 2012).

²⁹ About the figure of Enos Mills see the following paragraph.

³⁰ Cfr. J.R. Fazio, *Liberty Hyde Bailey and Enos A. Mills: pioneers in environmental interpretation*, «Nature Study», vol. 29, n. 2, Summer 1975, pp. 1-3, 12 (repr. in *Enos A. Mills: author, speaker, nature guide*, ed. by E. Burnell Mills, E.M. Mills, E.V. Mills, Longs Peak, CO., Temporal Mechanical Press, 2005). See also A. Drummond, *Enos Mills: Citizen of Nature*, Boulder, CO., University Press of Colorado, 2002 (reprint of 1995), p. 364.

³¹ In particular see S.G. Kohlstedt, *Teaching children science: hands-on nature study in North America, 1890-1930*, Chicago-London, The University of Chicago Press, 2010. On the *Nature Study Movement* see also K.C. Armitage, *The Nature Study Movement. The forgotten popularizer of America's conservation ethic*, Lawrence, University Press of Kansas, 2009.

help us to gain a better understanding of some of the basic principles of the future *heritage interpretation* as well as to grasp purposes and grounds that were common to the most innovative educational methods of the time, which would then merge in various ways in North-American *progressive education*.

Born and raised on a farm in Michigan, Liberty Hyde Bailey (1858-1954)³² was initially a pupil of the great botanist Asa Gray (1810-1888), and then went on to become a university professor himself. A founder of the Department of Horticulture at Cornell University, Bailey called for educational reform, especially in the teaching of natural and agricultural science which, based on a close and empathic contact with nature, allowed the child to develop – through what he himself called the «poetic interpretation of nature» – scientific observation and critical thinking, along with a new environmental ethic and profound social responsibility. This movement for educational reform, of which Bailey was the promoter at Cornell, came to be known as the *Nature Study Movement*. The ‘study of nature’ was not really a new concept, since the idea of learning based on a direct and informal observation of nature had already been introduced in the United States – both within scientific and academic research as well as in school teaching – by various figures, in particular the famous naturalist Louis Agassiz (1807-1873)³³. A naturalist, geologist and palaeontologist of Swiss origin and European background – in Europe and especially in Germany he had been deeply influenced by the philosophical movement, rooted in Romanticism, which was called *Naturphilosophie* –, Agassiz was not only a brilliant scientist, but in his role as an educator he strenuously promoted an innovative teaching method based on objects and on experimental work in direct contact with nature rather than on the *auctoritas* of books and manuals: a method that the naturalist illustrated in his work *Teaching from nature herself* (1886) and which was symbolically summarized in the famous motto «Nature, not books!». In the new continent, if these approaches, philosophical as well as pedagogical, were ideally connected to the same vein of American Transcendentalism – which had also led Thoreau to say that «Every child should be encouraged to study not man’s system of nature but Nature’s»³⁴ –, on the other hand they were

³² For a first bibliography see *Liberty Hyde Bailey, 1858-1954. A Biographical Memoir*, by H.P. Banks, «Biographical Memoirs», vol. 64, 1994, pp. 1-33, <books.nap.edu/html/biomems/lbailey.pdf> (last access: October 19th, 2012); a selection of the most important writings: L.H. Bailey, *Essential Agrarian and Environmental Writings*, ed. by Z.M. Jack, New York, Cornell University Press, 2008.

³³ Bailey himself recalls how the Agassiz’s innovative approach to the study of natural history was adopted throughout the school system as well, thanks to his many pupils and followers (cfr. L. Hyde Bailey, *The Nature Study Idea: an interpretation of the new school-movement to put the child into relation and sympathy with Nature*, New York, Doubleday, Page & Co., 1903. The edition consulted is the fourth: New York, The Macmillan Company, 1911, p. 14).

³⁴ See S.G. Kohlstedt, *Nature, Not Books: scientists and the origins of the Nature-study movement in the 1890s*, «Isis», vol. 96, n. 3, Sept. 2005, pp. 324-352; and Ead., *Teaching children science*, cit., pp. 20 ff.; K. Tolley, *The science education of American girls: a historical perspective*,

also linked to the growing demands for reform of the American school system. These instances of renewal led some reforming educators, during the nineteenth century, to propagate in the United States the teaching of the pedagogy of Johan Heinrich Pestalozzi and in particular his objective, or intuitive, method, known under the English expression *object training*: with this aim other figures became involved such as the naturalist and philanthropist William MacLure (1763-1840)³⁵, a staunch Pestalozzi follower, or such as the school superintendent Edward A. Sheldon (1823-1897), founder of the famous Oswego teacher training school which adopted the Pestalozzi method³⁶.

The same instances of renewal, which would later lead to John Dewey and Francis W. Parker's *progressive education*³⁷, were also shared by the leaders of the nature study movement who, by advocating new methods closely anchored to the natural world, wanted to re-found teaching in primary schools in order to bring it more into line with the demands of American society, while address-

New York, RoutledgeFalmer, 2003. The citation by Thoreau is from his diary in *The Writings of Henry D. Thoreau. Journal*, ed. by J.C. Broderick, R. Sattelmeyer, Princeton, NJ., Princeton University Press, 1984, Vol. 2: 1842-1848, p. 91.

³⁵ In 1805 MacLure had met Pestalozzi in Yverdon and asked to follow him to Philadelphia in order to establish the first American school based on the Pestalozzi method. The pedagogist refused but suggested his pupil Joseph Neef (1770-1854), who was a teacher in Paris at the time. Neef followed MacLure to America and established various institutions, which, however, were short-lived. In 1825 Neef was invited – with other followers of the Pestalozzi method – to cooperate in MacLure's the experimental educational project within the *Community for Equality* in New Harmony, the «utopian village» founded in Indiana by Robert Owen (1824-1828). Despite its failure, like other projects, Neef's writings (*Sketch of a plan and method of education*, 1808) contributed to propagating the pedagogy and teaching of Pestalozzi in United States. In general see: W.S. Monroe, *History of the Pestalozzian Movement in the United States*, New York, Arno Press & The New York Times, 1969; about MacLure and Neef in particular see G.L. Gutek, *Joseph Neef: The Americanization of Pestalozzianism*, Alabama, The University of Alabama Press, 1978.

³⁶ The educator and reformer, Edward A. Sheldon organized the system of public schools in Oswego (New York) and in 1861 gave birth to the first Training School in the United States which was more focused on professional practice than the existing Normal Schools, the Oswego Teacher Training School (in 1865 recognized as a State Normal and Training School). Sheldon was inspired by the Pestalozzi method which fascinated him and, on a trip to Toronto, in a museum he had seen the learning object collection from the Home and Colonial Training Institution of London, founded by a friend and pupil of Pestalozzi. From this institution arrived the Pestalozzi educator Margaret Jones, who – after being invited by Sheldon to Oswego – would train the first generations of American primary teachers. Sheldon illustrated his method in his *Manual of elementary instruction* (1862) and in *Lesson on objects training* (1863). See Mary Downing Sheldon Barnes (ed.), *Autobiography of Edward Austin Sheldon*, New York, Ives-Butler Company, 1911. On the role played by Sheldon in introducing – by renovating the training of American teachers – the educational “revolution” represented by *object teaching* developed by Pestalozzi see P. Rillero, *The Revolution of Enlightenment. A historical case study of significant educational change through teacher education*, «Journal of Science Teacher Education», vol. 4, n. 2, March 1993, pp. 37-43.

³⁷ On the pre-Dewey roots of progressive education, and on the role of the theory of Pestalozzi and Froebel in developing the pedagogical paradigm of the time, see W.J. Reese, *The origins of progressive education*, «History of Education Quarterly», vol. 41, n. 1, Spring 2001, pp. 1-24.

ing contingent needs and objectives of a more practical and economic nature. In the years 1891-1893, in fact, a serious agricultural crisis had prompted the State of New York to establish a Committee for the Promotion of Agriculture, which commissioned Cornell University to promote *nature-study* both in rural schools and *district schools* in order to train the young generations to gain a better understanding of agricultural issues and revitalize the countryside that was in the process of depopulation, in short, to stimulate the emergence of new, more modern and rational agriculture. Members of the Committee were appointed, including, among others, Liberty Hyde Bailey and his colleague Anna Botsford Comstock, who was the collaborator and wife of a famous entomologist at Cornell but, above all, was a former teacher as well as a connoisseur of the method of the object-lesson taught in Oswego Normal School³⁸.

Both Bailey and Comstock agreed on the fact that a *nature study curriculum* could be adapted for this purpose for primary teaching in rural schools. Comstock devoted herself to preparing and disseminating the curriculum and, along with Bailey, supervised the publishing of a series of teaching materials: the leaflet for teachers «Teacher's Leaflet on Nature Study» (published by the College of Agriculture at Cornell between 1896 and 1904, which later become a magazine entitled «Cornell Rural School Leaflet»); the correspondence course «Home Nature Study Course» (1903 to 1910; and soon gathered in the publication, edited by Botsford Comstock herself, *Handbook of nature study*, 1911); up to the magazines «The Nature Study Review» (organ of the American Nature Study Society, which Bailey founded in 1908) and «Junior Naturalist Monthly»³⁹.

In the first issue of the «Leaflet» Bailey illustrated to teachers the object, methodology and purpose of *nature study*, emphasizing the 'natural' characteristics of such learning, i.e. informal and experiential:

Nature-study is not the study of a science, [...] it takes the things at hand and endeavors to understand them, without reference primarily to the systematic order or relationships of the objects. It is informal, as are the objects which one sees. It is entirely divorced from mere definitions, or from formal explanations in books. It is therefore supremely natural. [...] The proper objects of nature-study are the things that one oftenest meets. Stones, flowers, twigs, birds, insects, are good and common subjects. The child, or even the high school pupil, is first interested in things that do not need to be analyzed or changed into unusual forms or problems⁴⁰.

³⁸ On Anna Botsford Comstock and her role within the *Nature Study Movement* see Kohlstedt, *Teaching children science: hands-on nature study in North America, 1890-1930*, cit., pp. 78-84.

³⁹ *Ibid.*

⁴⁰ L.H. Bailey, *What is nature-study?* (from «Teachers' Leaflet», n. 6, May I 1897). The *Leaflet* is available online at the Liberty Hyde Bailey Museum, <<http://lhbm.south-haven.com/>> (last access: September 2nd, 2012), as an extract from the *Cornell nature-study leaflets: being a selection, with revision, from Teachers' leaflets, Home nature-study lessons, Junior naturalist monthlies, and other publications from the College of Agriculture, Cornell University, Ithaca, N.Y., 1896-1904*, «Nature-Study Bulletin», n. 1, New York Dept. of Agriculture, J.B. Lyon co., 1904 (pp. 11, 13).

Nature study is a ‘natural’ study method because, while fleeing from barren classificatory notionism and from bookish and pedantic knowledge, it offers a «natural way of acquiring knowledge» and best suited to «[training the mind] for efficient thinking», developing rational, critical and independent thought, in children as well as in humans in general:

If the objects to be studied are informal, the methods of teaching should be the same. [...] Every child, and every grown person too, for that matter, is interested in nature study, for it is the natural way of acquiring knowledge. [...] The first essential in nature-study is actually to see the thing or the phenomenon. It is positive, direct, discriminating, accurate observation. The second essential is to understand why the thing is so, or what it means. The third essential is the desire to know more, and this comes of itself and thereby is unlike much other effort of the schoolroom. The final result should be the development of a keen personal interest in every natural object and phenomenon⁴¹.

This type of learning, in the opinion of its proponents, was intended not only to develop children’s scientific knowledge but to enhance the human person as a whole and especially in the dimension of knowing and experiencing the reality and daily communion with nature and with other living beings. As better explained in the work *The Nature Study Idea: being an interpretation of the New School-Movement to put the child in sympathy with nature* (New York, Doubleday, Page & Co., 1903), defines the exclusively educational origin and aim of the movement, but – whilst reiterating that school and education constitute the elective field of birth and of the application of *nature-study* – he still claims the global and humanistic value of this type of education which is capable of addressing the child as well as «every grown person», i.e. to the human being:

[The term nature-study] designates the movement originating in the common schools to open the pupil’s mind by direct observation to a knowledge and love of the common things and experiences in the child’s life and environment. It is a pedagogical term, not a scientific term. It is not synonymous with the old term “natural history”, nor with “biology”, nor with “elementary science”. It is not “popular science”. It is not the study of nature merely. Nature may be studied with either of two objects: to discover new truth for the purpose of increasing the sum of human knowledge; or to put the pupil in a sympathetic attitude toward nature for the purpose of increasing his joy of living. The first object, whether pursued in a technical or elementary way, is a *science-teaching movement*, and its professed purpose is to make investigators and specialists. The second object is a *nature-study movement*, and its purpose is to enable every person to live a richer life, whatever his business or profession may be⁴². [...] Nature-study, then, is not science. It is not knowledge. It is not facts. It is spirit. It is an attitude of mind. It concerns itself with the child’s outlook on the world⁴³.

⁴¹ *Ibid.*, p. 15.

⁴² L.H. Bailey, *The Nature study idea: an interpretation of the new school-movement to put the child into relation and sympathy with Nature*, fourth ed. revised, New York, The Macmillan Company, 1911, pp. 4-5. The italics are ours.

⁴³ *Ibid.*, p. 6.

Following previous publications, also *The Nature Study Idea* was conceived with an educational purpose, and specifically to provide primary school teachers with a new working method that encourages active learning in the gardens, and releases students from the oppression of formal teaching in the school environment, in order to put them more closely in contact not only with the natural world but also with the deepest ethical and social dimension of human nature:

We are to open the child's mind to his natural existence, develop his sense of responsibility and of self-dependence, train him to respect the resources of the earth, teach him the obligations of citizenship, interest him sympathetically in the occupation of men, quicken his relations to human life in general, and touch his imagination with the spiritual forces of the world⁴⁴.

In addition to recurring concepts – which will return in the writings of one of the founding fathers of *interpretation*, Enos A. Mills⁴⁵ – in the very last of Bailey's work we find the concept of 'interpretation' organically inserted into the complex panorama of the *nature-study* method and conception outlined so far. In *The Nature Study Idea*, in fact, Bailey devotes Part II (entitled «The poetic interpretation of nature») to 'interpretation', defined as the way in which men read the world according to the subjective attitude that they have developed towards reality. Such a subjective attitude should be developed in order to «bring about any close and satisfying touch with nature» (*ibid.*, p. 113) and, with this aim, it is necessary to strip ourselves of egoism and utilitarianism («the eyes of self-interest – to determine whether plants and animals are 'beneficial' or 'injurious' to man», *ibid.*, p. 114). Interpretation is, of course, the «point of view» which «determines the current of our lives» (*ibid.*); the ability, however, to look at nature from a new perspective, that is no longer selfish (that cares only about the utility that men can derive from nature) but «intrinsic» (attentive to nature in itself) can only be instilled in young students by teachers, to whom Bailey attributes great power («The power that moves the world is the power of the teacher», *ibid.*, p. 116):

Being human, we interpret nature in human terms. Much of our interpretation of nature is only an interpretation of ourselves. Because a condition or a motive obtains in human affairs, we assume that it obtains everywhere. The only point of view is our own point of view. [...] We hope that we are coming nearer to an intrinsic view of animals and plants; yet we are still so intent on discovering what ought to be, that we forget to accept what is⁴⁶.

After illustrating the purpose of interpretation, Bailey focuses on the teaching and learning method favoured by *nature study*: referring to the fact that children can more easily get in touch with the natural world, and with objects in general,

⁴⁴ *Ibid.*, p. 11.

⁴⁵ See better the following paragraph: Enos A. Mills (1870-1922): «*the poetic interpretation of the facts of nature*».

⁴⁶ *Ibid.*, pp. 129-130.

by availing themselves of the powerful tools of fantasy and imagination, Bailey points out that:

There are two ways of interpreting nature – the way of fact and the way of fancy. To the scientist and to the average man the interpretation by fact is usually the only admissible one. He may not be open to argument or conviction that there can be any other truthful way of knowing the external world. Yet, the artist and the poet know this world, and they do not know it by cold knowledge or by analysis. It appeals to them in its moods. [...] We have a right to a poetic interpretation of nature. The child interprets nature and the world through imagination and feeling and sympathy⁴⁷.

To better illustrate the concept, Bailey reports the case of the poem *Robert of Lincoln* by the poet and journalist William Cullen Bryant (1794-1898). Bailey had seen a school activity based on this poem, which refers – of course in poetic terms, and specifically in the form of children’s rhyme – to migratory blackbirds (whose English name is *bobolink*, derived from the archaic and onomatopoeic *bobolincon*, and hence the play on words). To a friend biologist and college teacher, who had criticized the use of a poem while teaching natural sciences, it was «unscientific» because of the excessive discursiveness and lack of truthfulness of poetry («The poem is untrue») which caused, in its say, a sort of «looseness of ideas» and of attention, Bailey argues that poetry is superior to traditional teaching:

I should rather know the song of the bobolink than to know all about the structure of the bird; of course, I should prefer to know both, if I could. To be sure, I should study the bobolink before I studied the poem; but I should want a real bobolink, not a stuffed specimen. If I were obliged to choose between lessons on stuffed bobolinks and the poem, I should take the poem: there is more bobolink in it. I like Bryant’s lyric because it catches so much of the life of a bobolink. *A scientific description could tell the facts better, but only ornithologists read scientific descriptions*⁴⁸.

So the poetic interpretation of nature is one of many ways of teaching/learning of which *nature-study* avails itself. Through a poetic and narrative approach (Bailey adds that «An animal or a plant may be represented as telling its own story without misleading anyone, even as a character in a novel may speak in the first person», *ibid.*, p. 160) the main objective can be reached which is «to put the pupil in a sympathetic attitude toward nature for the purpose of increasing his joy of living» (*ibid.*, p. 5). Of course it is essential that the observation and reading of nature are truthful, but they should also be able to get in touch with the true essence of the natural world without forgetting to engage the mind: that makes it possible to enjoy nature and truth at the same

⁴⁷ *Ibid.*, pp. 35-37.

⁴⁸ *Ibid.*, pp. 155-156. The italics are ours.

time. As a consequence, reading the ‘fact’ cannot be divorced from fantasy and imagination, which are powerful tools of the human mind and the foundations of scientific thought:

This is the age of fact, and we are glad of it. But it may be also an age of the imagination. *There need be no divorce of fact and fancy*; they are only the poles of experience. What is called the scientific method is only imagination trained and set within bounds. Compared with the whole mass of scientific attainment, mere fact is but a minor part, after all. *Facts are bridged by imagination*. They are tied together by the thread of speculation and hypothesis. *The very essence of science is to reason from the known to the unknown*. There can be no objection to the poetic interpretation of nature. It is essentially only that the observation be correct and the inference reasonable, and that we allow it only at proper times. In teaching science we may confine ourselves to scientific formulas, but in teaching nature we may admit the spirit as well as the letter⁴⁹.

Hence the ‘interpreter’ teacher, who can guide his pupils in their quest for truth by exploring and discovering («from the known to the unknown») reality through thought and the consequent development of a ‘point of view’, which is personal without being *selfish*, but generous and open to an observation and understanding of the reasons and laws of the natural world. Only after gaining this love for observation, will children pass on to study sciences in a more formal way which is more appropriate to higher education, that is, a way «adapted to mature persons and to those who would know a particular science» (*ibid.*, p. 5).

What is noteworthy to underline, for the purposes of this paper, is that – regardless of the success, or the criticism, that the nature study movement had in the history of American schools – in those same years, the precious suggestions from Nature Study Movement were, perhaps more attentively, collected and applied in *other* ambits, particularly in the field of what we now call ‘informal education’. As one can see, Bailey not only established, well ahead of its time, the theoretical foundations for what later, particularly in the Sixties, would become environmental education, but at the same time he contributed to developing the most genuine ideas and principles underlying what, in those very years, acquired the name «nature interpretation» – principles that would be passed on in the writings of the masters of interpretation, from Enos Mills to Freeman Tilden. While Bailey, in fact, fought to promote *Nature Study* in American schools, his young contemporary Enos A. Mills applied and refined the practice and philosophy of *interpretation*, somehow embodying a true «personification of nature study» and at the same time practising as the first true «model interpreter»⁵⁰.

⁴⁹ *Ibid.*, pp. 157-158. The italics are ours.

⁵⁰ Cfr. Fazio, *Liberty Hyde Bailey and Enos A. Mills: pioneers in environmental interpretation*, cit. Also Alexander Drummond (*Enos Mills: Citizen of Nature*, cit., p. 364) recalls that the scholar James R. Fazio was probably the first to set a connection between the thought and work of Mills

Enos A. Mills (1870-1922): «the poetic interpretation of the facts of nature»

Within this scenario stands out the even more significant figure of Enos Abijah Mills, who was considered a pioneer in what he himself called and qualified as the art of *nature guiding*⁵¹.

Born and raised in a farm in Kansas from a Quaker family, as a teenager Mills visited his relatives in Colorado in the hope that a better climate would offer relief from his frail health. It was there that, at the age of 15, he made his first ascent of Long's Peak Mountain and fell in love with the mountain, then deciding to become a guide. To finance himself, during the winter Mills worked at a copper mine in Montana, where his abilities and self-taught study led him, from being an equipment attendant, to become a mining engineer. In the same years he travelled extensively and in 1889 it was the casual encounter, in California, with the naturalist John Muir that convinced him to permanently devote himself to the study of nature as well as to the environmental cause. In 1901 Mills definitely acquired his cousin's ranch in Long's Peak Valley and turned it into a resort to receive tourists.

Again on Muir's suggestion, Mills also decided to write down his experiences in contact with nature. Over the years, his many mountain hikes and his trips across the country (as well as in Canada, Alaska and Mexico) and also the time spent as a snow observer for the Colorado department of Agriculture (from 1904 to 1906) provided him with valuable material for numerous articles and books that Mills began to publish with success⁵². Thanks to his fame as a writer and popular lecturer throughout the country, Mills helped – along with pressure from environmental groups of the time – to make the area around Long's Peak become a reserve: in 1915 the Rocky Mountain National Park was established and this event earned Mills, as reported on the pages of the «Denver Post», the

and Bailey. About Enos Mills as the first *environmental interpreter* see also Merriman, Brochu, *The history of heritage interpretation in the United States*, cit.; S.R. Civitarese, M.H. Legg, D.M. Zuefle, *More thoughts on the differences between environmental interpretation and environmental education*, «Legacy», vol. 8, n. 6, November-December 1997, pp. 28-29.

⁵¹ In addition to the basic works by A. Drummond, *Enos Mills: Citizen of Nature*, cit., and J. Stansfield, *Enos Mills: Rocky Mountain Naturalist*, Palmer Lake, CO., Filter Press, 2005, biographical information about Mills can be found in the website edited by Mills' descendants Elizabeth and Eryn Mills: *Enos Mills History*, Enos Mills Cabin, <<http://www.enosmills.com/>> (last access: September 2nd, 2012). For further reading see also the biography written by Mills' widow Esther Burnell Mills along with Hildegard Hawthorne (*Enos Mills of the Rockies*, Boston MA., Houghton Mifflin, 1935) as well as the aforementioned *Enos A. Mills: author, speaker, nature guide*, ed. by E. Burnell Mills, E.M. Mills, E.V. Mills, cit. Mills' papers and documents are preserved both in the *Enos Mills Cabin Collection* by Mills family, and in the archival fund *Enos A. Mills Papers*, CONS250, Conservation Collection at The Denver Public Library (of which the inventory is accessible online at url: <<http://eadsrv.denverlibrary.org/sdx/pl/>>, last access: December 2nd, 2010).

⁵² C. Abbott, «To arouse interest in the outdoors»: *the literary career of Enos Mills*, «Montana: The Magazine of Western History», vol. 31, n. 2, Spring 1981, pp. 2-15.

title «Father of Rocky Mountain National Park».

Now, to better understand the ‘interpretive’ and educational method Mills adopted with visitors, especially younger ones, who followed him in mountain hiking and nature excursions, many passages from his articles and books are particularly significant. In his works emerge his talent as an interpreter of nature, as a storyteller and ‘naturalist writer’ and this skill was recognized to such an extent, that his name appears not only among the outstanding figures in nature literature, but his tales were reviewed in repertories of children’s and juvenile literature of the time as well⁵³. A clear example is represented by the *The Story of a Thousand-Year Pine*, which appeared in August 1908 in the magazine «The World’s Work», and was then reprinted in his first best-seller *Wild Life on the Rockies* (1909). In this tale, which tells of the hacking down of an immense and ancient pine, the naturalist gives evidence of his capacity to interpret, that is, to transform scientific information – such as the trees growth rings visible in the section of the stump – into a real biographical narrative of major events in the life of the pine from its birth in 856 until its ‘murder’ in 1903:

The peculiar charm and fascination that trees exert over many people I had always felt from childhood, but it was that great nature-lover, John Muir, who first showed me how and where to learn their language. [...] Trees, like people, struggle for existence, and an aged tree, like an aged person, has not only a striking appearance, but an interesting biography. I have read the autobiographies of many century-old trees, and have found their life-stories strange and impressive. The yearly growth, or annual ring of wood with which trees envelop themselves, is embossed with so many of their experiences that this annual ring of growth literally forms an autobiographic diary of the tree’s life. I wanted to read Old Pine’s autobiography⁵⁴.

The story is engrossing and exciting and gives us an idea of how a hike conducted by Mills would have been. It also brings to life the extraordinary sense of adventure that our interpreter was able to instil in visitors. From this point of view, particularly illuminating – for the purposes of our analysis – is the book *The Adventures of a nature guide and essays in interpretation* which Mills sent to the press in 1920⁵⁵, a few years before his death. In this seminal work Mills recounts his experience at Long Peak Inn and above all his everyday

⁵³ E.E. Gardner, E. Ramsey, *A handbook of children’s literature, methods and materials*, Chicago, Scott, Foresman and Co., 1927; W. Taylor Field, *A guide to literature for children*, Boston, Ginn and Co., 1928; M. Stancliff Wilkinson, *The right book for the right child: a graded buying list of children’s books*, New York, John Day Co., 1937.

⁵⁴ E.A. Mills, *Wild life on the rockies*, Boston & New York, Houghton Mifflin Co., c1909, pp. 31, 33. Several digitizations of Mills’ works are *full-text* available in the net, especially in the *Internet Archive*, <<http://archive.org/>>; the consulted edition is accessible also in the *digital repository* of The University of Georgia Libraries, <<http://fax.libs.uga.edu/>> (last access: September 5th, 2012).

⁵⁵ E.A. Mills, *The adventures of a nature guide and essays in interpretation*, Garden City-New York, Doubleday-Page & Co., 1920. We cite from the consulted edition LaVergne, TN., Kessinger Publishing, 2010 (anastatic reprint of the original 1920 edition).

work in contact with nature as well as in contact with people: as a guide for visitors, as a trainer of future guides and especially as an *interpreter* for his favourite public, children.

As already mentioned, in 1901 Mills had turned the ranch acquired from his cousin into Long's Peak Inn: a real base of operations where visitors could be welcomed, a starting point for nature walks for adults and children, and finally a venue where evening classes and training courses were given. And this was one of the peculiarities that made his famous *Trail School* unique and innovative: here, in fact, Muir was the first to offer educational activities based on his very own 'method' and he aimed to transmit the method itself to future environmental guides. It is significant that among Mills' trainees there were to be the first «nature teachers» and «women guides», such as the sisters Esther and Elizabeth Burnell: the first being his wife and secretary and the second being a teacher, future head of Mill's Trail School and subsequently supervisor of nature study in Los Angeles schools in the early 1900s⁵⁶. In this way Mills describes the school's activities:

This school – the great outdoors – is in session whenever children wander over the trail, free from academic chaperonage. The trail supplies materials and equipment, and Mother Nature is an endless mental stimulus. [...] The Trail School is little more than a name, plus results. There is no organization, no staff; no opening, no closing. It has no courses of study, no set times for study, no set tasks, no grade cards. The children follow any interest that appeals, and when it appeals. [...] There are no recitations and no examinations. Competition, as ordinarily known, does not exist. There are no prizes for excellence, no honors for advancement. [...] Books we highly prize, but their place is made wholly secondary and incidental. Information given the children is tied up with life, connected with neighbours, and given a place or a part in things going on⁵⁷.

Worthy of mention is the fact that Mills also organized in the school a *Nature Room* where his children could meet, gather the most curious objects collected from trips and organize their own photographs (Mills in fact attributed an important educational value to photography, thus showing a great topicality in the training methods adopted with his younger pupils)⁵⁸; again, children could produce other materials themselves such as diaries, or read the books from the specialised library, and organize naturalistic exhibitions for visitors. Here, again, Mills had even rebuilt, in a special container, the natural habitat of Long's Peak tundra to show to those people who were not able to visit the mountain⁵⁹.

⁵⁶ Kohlstedt, *Teaching children science*, cit., pp. 221, 239; Drummond, *Enos Mills: citizen of nature*, cit., in particular, pp. 297-298, 369.

⁵⁷ Mills, *The adventures of a nature guide and essays in interpretation*, cit., pp. 159-160.

⁵⁸ «The camera adds purpose and interest to an outing. It is educational and develops the artistic and the habit of seeing the beautiful – of looking for the best. [...] These [pictures, *ndr*] will preserve with startling, delightful fidelity the interesting experiences of the trip» (*ibid.*, p. 151).

⁵⁹ See the website edited by Elizabeth and Eryn Mills: *Enos Mills history*, Enos Mills Cabin, <<http://www.enosmills.com>> (last access: September 7th, 2012).

The exquisite educational value of this space was such that Mills called for a Nature Room – along with a dedicated Library, and naturally a Trail School – to be established in every city park, and even in every home: «A nature room in every home containing photographs, nature books, and geological specimens. This would be a help in education» (*ibid.*, p. 247). Mills gives us an outline of the activities which were carried out in such a Nature Room:

There is a bulletin board in the nature room on which appear notices of future excursions, of discoveries, of special meetings, of exhibitions, of flowers, rocks, and other things wanted for these exhibitions, and recent outdoor photographs. When the children are not in the field, a conference may be called at any time. [...] We discouraged the collection of specimens, but we encouraged the bringing in of a mental record – an account of the day's experience. From now on we shall provide a book and encourage each child to write down the most important experience of the day as a part of the outing round. [...] A few unusual specimens collected by the children have been preserved for their natural history association and their nature room. In this room they hold meetings. If a child comes upon something deemed rare, something that will be of general interest, he is encouraged to bring it in for the nature room. [...] Occasionally the children give an exhibition and invite the older people to see it. They plan these exhibitions and gather and arrange materials for them⁶⁰.

In the writings of Mills – who had read Muir and Bailey (often quoted) and maybe also Froebel (mentioned in his work) – we can trace the clear characteristics of an emerging new practice (environmental interpretation) and of an emerging new professional figure (the nature-guide) that needed to be specially educated and trained:

While a guide on Long's Peak I developed what may be called *the poetic interpretation of the facts of nature*. Scientific names in a dead language together with classifications that dulled interest were ever received, as they should have been, with indifference and lack of enthusiasm by those who did not know. Hence I began to state information about most things in the form of its manners and customs, its neighbours and its biography. Nature's *storybook* is everywhere and always open. And I wish children might have everywhere what the children have had here in enjoyment, educational foundation, and incentive. What we are doing here may be done elsewhere⁶¹.

It is not wrong to say that the interpretive method that Mills developed was primarily based, on the one hand, on the guide's of transforming scientific facts and data into a narrative and biographical story (as already seen in the story of the fallen *Old Pine*), in short, into a wonderful adventure:

A nature guide is a naturalist who can guide others to the secrets of nature. Every plant and animal, every stream and stone, has a number of fascinating *facts* associated with it and about each there are numberless *stories*. Beavers build houses, bears play, birds have a summer and a winter home thousand of miles apart, flowers have colour and perfume –

⁶⁰ Mills, *The adventures of a nature guide*, cit., pp. 169-172.

⁶¹ *Ibid.*, p. 158. The italics are ours.

every species of life is fitted for a peculiar life zone. The *why* of these things, *how* all came about, are of interest. *Touched by a nature guide the wilderness of the outdoors becomes a wonderland*. Then, even after, wherever one goes afield he enjoys the *poetry of nature*⁶².

This narrative and poetic way of presenting facts – which seems to clearly echo the *poetic interpretation* of Liberty Hyde Bailey – is a real methodology, to the point that it can be applied to other ambits such as museums, as Mills himself underlines: «Recent museum groups embody the spirit of nature guiding – giving the manners and customs, the friends and enemies of wild life» (*ibid.*, p. 256). On the other hand, the guide's naturalistic narrative drew its lifeblood from the fact that nature and animals are in themselves a source of happiness and knowledge, and that they 'teach' their lesson without books or lectures, but rather through an intrinsic ability to establish a deep connection with every human being. Such a conception reveals the Muir legacy, as substantially emerges in a passage that Mills quotes from John Muir's *The Story of My Boyhood and Youth*: «The animals about us were a never-ending source of wonder and delight. [...] Here, without knowing it, we still were in school; every wild lesson a love lesson, not whipped but charmed into us»⁶³.

Mills's thought therefore reflects the teachings of Muir (and of Emerson through him), without neglecting the up-to-date results of the educational research embodied in Bailey's *Nature-Study Idea* of 1903. Deeply rooted in Mills was the belief that, through this spontaneous approach to nature, and through work based on observation, experimentation and the direct «poetic interpretation of the facts of nature» that takes place with the narration of «things in the form of its manners and customs, its neighbours and its biography» (*ibid.*, p. 158), the study of nature could develop in children a sense of responsibility along with respect towards the earth's resources. In short, the interpretation of nature gives rise to a powerful 'virtuous circle' of education, which certainly puts men (and especially children) in contact with the spiritual forces of the world as well as with their nature of human beings and responsible citizens. On the basis of these premises, Enos Mills developed – in parallel with his work as a guide and educator – the first principles on which the practice and training of the professional figure of the nature guide were founded. Once again, in his work *The Adventures of a nature guide* – rightly considered a cornerstone of the literature about interpretation – Mills summarizes in various passages, which are now famous, his vision of the new profession of interpreter, i.e. a guide and educator at the same time:

A trip with a nature guide is a rare influence for children. Eagerly they look and they listen; they see, they search, and they think. It is an alluring and most effective way of arousing the child mind so that it wants to know, so that it starts investigating and exploring, so that it

⁶² *Ibid.*, p. 245. The italics are ours.

⁶³ Quoted in Mills, *The adventures of a nature guide*, cit., pp. 158-159.

insists on finding out. This new occupation [interpreter of nature] is likely to be far-reaching in its influences; *it is inspirational and educational*. Any one who has a vacation or an outing in contact with nature will have from the great outdoors its higher values as well as a livelier enjoyment if accompanied by a nature guide⁶⁴.

So the ‘educational potential’ of the natural world – considered, as we have seen, original and somehow inherent to the very experience of being in contact with nature – is enhanced and amplified by the nature guide who can help people to draw the deepest and most authentic teaching, i.e. those «big principles» representing the higher level of knowledge and quite different from those mere facts and «detached and colourless information» which, even though exact and scientifically based, any ‘ordinary’ guide would normally present:

It is not necessary for a guide to be a walking encyclopedia. He does not need to impose theories from printed authorities nor to consider nature books infallible; but a knowledge of the leading nature and scientific books should be a part of his equipment and may become a part of the enjoyment of those whom he interests. And, also, the nature guide should know Shakespeare and many of the great poems. *A nature guide is not a guide in the ordinary sense of the word, and is not a teacher*. At all times, however, he has been rightfully associated with information and some form of education. But nature guiding, as we see it, is more inspirational than informational. [...] *The nature guide arouses interest by dealing in big principles – not with detached and colorless information*. He illustrates the principles of pollination, evolution, glaciation, migration of birds, mutual aid, and the fundamental forces of nature wherever he goes. He deals with the manners and customs of bird and animal life – the determining influences of their environment and their respondent tendencies – rather than with their classification. *He creates more permanent interest in the biography of a single tree than in the naming of many trees*⁶⁵.

Conveying information and notions is certainly at the base of interpretation which, however, is different both from the simple activity of dissemination (albeit of scientifically accurate contents) and from the pedantic instructions traditionally given in the schools of the time. While the latter – as can be read in Mills own words – is built on an abstract and superficial knowledge instilled through books and manuals, on the contrary interpretation employs a ‘new’ educational methodology which shows the clear traces of the same theoretical foundations of the American educational progressivism as well as of that ‘pedagogy of interest’ which is expressed in John Dewey’s famous *pedagogic creed* of 1897⁶⁶. The practice of free and direct observation of nature, along with the contextual use of narrative and poetry which stimulate the imagination, aims at the deeper involvement of children (and adults as well) during their guided

⁶⁴ *Ibid.*, p. 270. The quotation is from Chapt. XII: *The development of a woman guide*.

⁶⁵ *Ibid.*, pp. 249-250. The italics are ours.

⁶⁶ J. Dewey, *My Pedagogic Creed*, «School Journal», vol. 54, January 1897, pp. 77-80 (the original text is also online at: <<http://dewey.pragmatism.org/creed.htm>>, last access: September 4th, 2012). See the Italian translation: *Il mio credo pedagogico. Antologia di scritti sull'educazione*, scelta, introduzione e annotazioni a cura di L. Borghi, Firenze, La Nuova Italia, 1969.

tour by stimulating them to develop *intellectual visions* and to construct a lasting meaning: in short, by rousing a real learning path. As Mills writes again:

The nature guide is at his best when he discusses facts so that they appeal to the imagination and to the reason, gives flesh and blood to cold facts, makes life stories of inanimate objects. He deals with principles rather than isolated information, gives biographies rather than classifications. People are out for recreation and need restful, intellectual visions, and not dull, dry facts, rules, and manuals. What the guide says is essentially nature literature rather than encyclopedia natural history⁶⁷.

Mills founded this ‘new profession’ by drawing from an extensive and theoretical base (derived from vision and philosophy of nature of the time) as well as tried and tested method (resulting from years of experience as a nature guide) both of which, however, clearly vindicate a really *educational* role and mission of the interpreter – where the meaning of ‘education’ refers to an informal vision of education/learning processes in which a major role is played by imagination, inspiration, narration and, last but not least, fun. Indeed the opposition between notional, cold and ‘formal’ school learning on the one hand, and the new learning conveyed by the «poetic interpretation of the facts of nature» on the other, is continuously stressed with a number of antinomic couples. Through the rhetorical device of antinomy Mills was able to outline the figure of the interpreter, describing his characteristics as opposed to those considered typical of a traditional school teacher («a nature guide is not a teacher»), and claiming specific goals and objectives.

In this regard he recalls the general recreational purpose, since «people are out for recreation», and the guide-interpreter must always start from this assumption; but the final objectives, on closer inspection, are highly educational: to communicate «big principles» and obtain «higher values from the great outdoor». If *big principles* correspond to the learning objectives of cognitive nature, *higher values* represent the learning objectives of an axiological nature, i.e. more connected to a system of values, such as to guide the actions and conduct of man. A deep knowledge of the great laws that govern the natural world, as a consequence, entail the acquisition of environmental consciousness and an ethic of respect for life in all its forms.

Thus, the opportunity to launch that learning experience, represented by the wildlife tour, is certainly offered by an initial search for «recreation» and «livelier enjoyment», that only the outdoors and direct contact with nature and living with animals can provide. But complete achievement of what Mills considered the real objectives of *recreational learning* – to use the expression coined by the master interpreter John Veverka⁶⁸, but we could also refer to the term *edutainment*, nowadays frequently mentioned in the ambit of the entertainment

⁶⁷ Mills, *The adventures of a nature guide*, cit., pp. 186-187.

⁶⁸ Veverka, *Interpretive Master Planning. The Essential planning guide*, cit., p. 3.

industry as well as that of education and cultural heritage – is made possible only by through the mediation of a *nature-guide*, who is motivated and well trained in interpretive techniques, as well as scientific knowledge. What Mills claims, in fact, is a definite working method, and once again the antinomic couples he delineates are illuminating for us. He says, in summary, that:

1. the guide-interpreter works in order to convey «big principles» rather than «isolated information».

And, to achieve this result, he relies on visitors' desire for recreation and enjoyment. Therefore, the tools that he uses are exactly opposite to those typical of a traditional formal (i.e. scholastic) education. In this way, he gets closer to the methods used in a kind of education which, today, we do not hesitate to define as *informal education*. So, the guide-interpreter:

2. offers «recreation» rather than «dull and dry facts»,
3. avails himself of «biographies», rather than «classifications»,
4. tells «life stories» rather than «inanimate objects»,
5. evokes «intellectual visions» but never uses «rules and manuals».

The interpreter, rather than mastering scientific knowledge (being a «natural history encyclopedia», as Mills says), opts for managing a «nature literature» i.e. a tool that, without sacrificing scientific accuracy, allows him exclusively to work on those psychological levers that generate deeper and more meaningful learning during a visit. This is where wonder, curiosity, pleasure for tales and narrative, merged with the imaginative power of evocation, are shown to be the main tools through which the interpreter can implement effective and advanced communication strategies. In addition to narrative, however, Mills promotes what we could define, from the viewpoint of the implemented teaching strategy, as a sort of socio-cultural animation⁶⁹ based on dialogue and conversation. Whilst in Muir we find the observation of nature – direct or through the expert naturalist – Mills on the other hand emphasizes the implementation of that conversational and dialogical approach that, in the following years, would represent the core itself of the new practice and profession:

The nature guide who understands human nature and possesses tact and ingenuity is able to hold divergent interests and scattering members of his party together. He appreciates, too, the eloquence of silence and is skilful in controlling, directing, and diverting the conversation of members of his party lest the beauty of the outdoors be marred by lack of discrimination of some one. He is master of the art of suggestion. *He is a leader rather than a teacher.* He

⁶⁹ With this expression we refer to the meaning that it assumes in the ambit of social pedagogy (especially in Europe, in France and Italy above all) with particular regard to adult education and community education, i.e. as a tool for learning, empowerment and social change in groups and communities, but also for leisure-time education for adults and children as well. For further readings see, in Italian, M. Pollo, *Animazione Culturale. Teoria e metodo*, Roma, LAS, 2002; M. De Rossi, *Didattica dell'animazione. Contesti, metodi, tecniche*, Roma, Carocci, 2008).

has control of his party so that he may *entertain, instruct, and command* without their being aware that he is ruling with a hand of iron when the best results of a trip demand it⁷⁰.

The interpreter is a «leader rather than a teacher», and his task is to «entertain, instruct and command» through the suggestive power of speech as well as through the dialogue based on a continuous loop of questions and answers carefully managed towards and from the visitor («Every child asks questions. The nature guide answers questions intelligently and thereby brings forth other intelligent questions»)⁷¹. For the guide-interpreter it is not enough to have a deep scientific knowledge of the environment in which he moves: he must be able to bring the audience to an independent discovery of nature and its truths, and this can be achieved if the guide-interpreter (or, we might say, the *facilitator*-interpreter) uses and applies precise communication techniques that are also educational.

And, as we have learnt from Mills' very words, these techniques and strategies – in which it is not difficult to trace similarities with an *ante-litteram* educational approach of constructivist nature – are numerous and varied. These strategies include, as we have seen, the direct involvement of visitors (especially the younger ones) in practical activities such as direct observation, collecting and cataloguing of samples and *specimina*, writing of memoirs and diaries, use of photography and so on. But also the technique of storytelling proves itself to be a tool to gently help visitors to understand, interpret and organize reality through personal, i.e. imaginative and emotional, involvement – as was also subsequently theorised by Jerome Bruner in his conception of narrative thinking⁷². Finally, dialogue and conversation (and its silences) can be used as effective instruments from the perspective of the guide, for conducting and managing learning processes in groups, and, from the perspective of the visitors, for implementing a new way of participative and collaborative learning through social relations and knowledge sharing – somehow prefiguring, on the one hand, the idea of communities of practice and the related concept of collaborative learning, which was to be outlined by Lave and Wenger in the Nineties on the one hand⁷³; on the other, anticipating conversational learning as a way of creating knowledge according to the theory of experiential learning

⁷⁰ Mills, *The adventures of a nature guide*, cit., p. 248.

⁷¹ *Ibid.*, p. 247.

⁷² J. Bruner, *La mente a più dimensioni*, Roma-Bari, Laterza, 1993 (It. transl. of *Actual Minds, Possible Worlds*, 1986); Id., *La ricerca del significato*, Torino, Bollati Boringhieri, 1992 (It. transl. of *Acts of Meaning*, 1990).

⁷³ J. Lave, E. Wenger, *L'apprendimento situato. Dall'osservazione alla partecipazione attiva nei contesti sociali*, Trento, Erickson, 2006 (It. transl. of: *Situated Learning. Legitimate peripheral participation*, 1991); E. Wenger, *Comunità di pratica. Apprendimento, significato e identità*, Roma, Raffaello Cortina, 2006 (It. transl. of: *Communities of Practice: Learning, Meaning, and Identity*, 1998).

developed by David A. Kolb⁷⁴. Mills' most genuine intuitions – be it the communicational strategies and, most importantly, the educational aims and axiological principles underlying the new profession – were deeply absorbed, then further developed and systematized by Freeman Tilden in his *Interpreting our heritage* (1957), thus demonstrating, still today, the great modernity of thought of those first 'Fathers of interpretation', their open-mindedness and their strategic and visionary ability to take a fresh look at cultural heritage.

Conclusions

During the last three decades the practice of *interpretation* has been variously defined by professional North-American associations as well as by contemporary U.S. masters of interpretation, and always with an emphasis on the communicational aspects, i.e. defined as a «communicational process»⁷⁵, as a particular «approach to communication»⁷⁶, or a specific «communication style»⁷⁷ and so on. While basically sharing such definitions, rightly and understandably focused on the communicational aspects of interpretation, from a pure pedagogical perspective, however, the analysis here proposed

⁷⁴ A. Baker, J.P. Jensen, D.A. Kolb, *Conversational learning. An experiential approach to knowledge creation*, Westport, Connecticut, CT., Quorum Books, 2002; D.A. Kolb, *Experiential learning. Experience as the source of learning and development*, Englewood Cliffs, NJ., Prentice-Hall, 1984.

⁷⁵ «Any communication process designed to reveal meanings and relationships of cultural and natural heritage to the public, through first-hand involvement with an object, artifact, landscape or site» (see the new website of the association Interpretation Canada: <<http://www.interpscan.ca/our-work-defined>>, last access: September 2nd, 2012).

⁷⁶ «Interpretation is simply an approach to communication. Most people think of it as the process through which a person translates one language into another [...] At its most basic level, that's exactly what interpretation is, translating. [...] interpretation involves translating the technical language of a [...] science or related field into terms and ideas that people who aren't scientists can readily understand. And it involves doing it in a way that's entertaining and interesting to these people». See S. Ham, *Environmental interpretation. A practical guide for people with big ideas and small budgets*, Golden, CO., Fulcrum Publishing, c1992, p. 3.

⁷⁷ «Any form of communication that we may have with visitors usually involves two basic communication styles. We present the materials we want the visitor to know in an *informational* style, or in an *interpretive* style. The difference between the two styles is not what we present but how we present it. Informational styles simply dispense the facts, the way a field guide lists and describes species, for example. But the interpretive style reveals a story or larger message, relying on Tilden's Principles to help the visitor relate to that message». See J.A. Veverka, *Interpretive master planning: for parks, historic sites, forests, zoos, and related tourism sites, for self-guided interpretive services, for interpretive exhibits, for guided programs/tours*, Helena, MT., Falcon Press, 1994 (the consulted edition is: *Interpretive Master Planning. The essential planning guide for interpretive centers, parks, self-guided trails, historic sites, zoos, exhibits & programs*, Tustin, CA., Acorn Naturalist, 1998. In 2011 a new edition in two volumes was printed and edited by the Scottish publishing house MuseumEtc Ltd. (see: <<http://museumetc.com/>>, February 2, 2012).

of the historical context of birth, along with a re-reading of the writings of John Muir and Enos Mills especially in the light of thought and works of some educationalists and educators of the time such as Luis Agassiz, Liberty Hyde Bailey, Anna Botsford Comstock, Edward A. Sheldon, actually seems to reveal the presence, at the very basis of the *interpretive practice*, of a strong pedagogical project and clear educational aims, which were perfectly balanced with the contemporary claims of protection of the wild on the one hand, and of visitors' involvement and tourists' needs for recreation, on the other.

The manifold historical and theoretical connections that seem to emerge between the philosophy of interpretation and the educational movements of the time, in fact, such as the *Nature Study*, the Pestalozzi's object lesson and the emergence of progressive education, show a great modernity in the very 'educational' approach, aims and methodology underlying this professional practice.

The origins and historical development of heritage interpretation would probably deserve closer attention by historians of education, on the one hand; on the other, interpretive methodologies are worth of being considered by contemporary educationalists, and particularly by those educators who, operating in the various ambits of heritage education, could actually derive interesting cues from a practice that aims «to provide new insights and deeper understanding», and is intended as «a process, in non-formal settings, of provoking thought and revealing meanings and relationships to widen and enrich people's minds and spirits»⁷⁸.

⁷⁸ Cited from the website of *Interpret Europe*, <<http://www.interpret-europe.net/top/heritage-interpretation/interpretation-defined.html>>.

The education of Venetian girls in Brazil: a study of colonial centers in São Caetano and Alfredo Chaves between 1883 and 1912

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ABSTRACT: This study analyzed the process of women's education in Italian colonial centers in São Caetano, state of São Paulo, and Alfredo Chaves, state of Paraná, in the late XIXth and early XXth century. Our goal was to learn about the routine of women's education in these schools and identify the role of female teachers who worked there. The immigrants in these colonies were aware of the need for education, but household duties contributed to low attendance. Our research shows that by staying in school these girls contributed to the process of shaping women's current role in society. The two primary sources of documents for this research were the *Public Archive of the State of São Paulo* and the *Public Archive of the State of Paraná*. The documents that were consulted for this study were about Italian immigration, the history of education and educational culture. We concluded that the all-female schools herein studied strived to shape the way their students learned.

EET/TEE KEYWORDS: Immigration; Girls' School; Women's Education; Women's Work; Social Perception; Brazil; XIX-XX Centuries.

Introduction

Analyzing documents is fundamental if one wishes to understand human relationships throughout History. Equally, a History of Education especially focusing on the study of the schools that Venetian girls attended inside foreign colonies in Brazil cannot be done without analyzing past school records. This

contact with real-life experience, however, revealed there is only a small amount of documents about all-female schools established in the colonial centers created by Italians during the later decades of the 19th century. For the aims of this research, documents available in the *Public Archives* of the States of São Paulo and Paraná have been analysed within the specified historical period. They consist of lists of School Attendance, Visitation Terms, School Exam Terms, Teachers' Enrollment, Leave and Termination Records.

At this time, it is important to determine the conceptual understanding of the term 'representation' in order to understand educational initiatives in regards to the childhood of female immigrants¹. Their education sought to mold the students into the social roles that these Venetian girls would have within their communities when they became adults. Thus, elementary education centered in domestic duties would be enough for the basic performance of women within their community. The representation that adults had of the girls' education was attached to the social role that they would play in the future, that of mother and housewife.

In the 19th century, «the current mentality did not value female education, focusing its attention on the social norms that prevented women from taking certain social roles»². Studies about the conditions of female immigrants in areas of European colonization in Brazil confirmed that many immigrant families denied their daughters access to basic education. They thought that after getting married – when women submitted to their husbands – they would not need to develop the skills of reading, writing and math³. To the contrary, basic education would allow them to inspect the family's finances, a role which was exclusively masculine. Moreover, «the ignorance in which the immigrant woman, and more precisely, the immigrant daughter was kept by the social group and the lack of knowledge were used to reinforce their alleged inferiority in relation to men». Thus, the lack of education also contributed to the difference between genders. Therefore, the way female education was handled was socially tacit. The education of girls who lived in the colonial centers was not socially relevant.

This view of unworthiness of the female universe was reflected on the production and maintenance of written records in their schools. The narrative described with possible traces, clues and evidence allowed for the unveiling of pieces of the history of those Venetian girls and of the daughters of the Venetian

¹ R. Chartier, *O mundo como representação*, «Estudos Avançados», vol. 5, n. 11, 1991, pp. 19-59.

² J. Soares de Almeida, *Ler as letras: por que educar meninas e mulheres?*, São Paulo, Autores Associados, 2007, p. 93.

³ L.S. Giron, *Dominação e subordinação: mulher e trabalho na pequena propriedade*, Porto Alegre, EST, 2008, p. 43.

families who attended public schools in São Caetano, in the state of São Paulo, and Alfredo Chaves, in Paraná⁴.

Female childhood education in those two colonies was marked by many obstacles in regards to its operation, such as constant interruption of classes due to frequent change of teachers, the lack of teaching material and classroom furniture. Still, there were more aggravating circumstances: the curriculum of the *Normal Schools* of the provinces of São Paulo and Paraná⁵. The teaching of French, German and English languages were available, but not Italian. Thus, teachers had to handle the language difficulties of those Italian students in their daily teachings.

Our study of the education of those girls had its foundation on the understanding that: school operation, individual performance, the use of school material, celebrated rituals, school activities, teachers' profession and performance, were all elements that composed the educational culture that was produced and discussed in the educational experience of this ethnic group during a specific period of time.

Considering the specificity of each school, we first strived to find out how girls were educated in the two Italian colonies in those separate locations. As we came in contact with written records other questions arose: how were those schools organized? Who were those girls? Who were the teachers? What level of education did those teachers have? And, how were their classroom activities performed? These questions were essential to produce the narrative about Venetian female childhood education in the colony of Alfredo Chaves, in Paraná, and in the colonial center of São Caetano, in São Paulo⁶.

It feels necessary to clarify who these girls that we here call *venetians* are. The migratory flow that began in the 19th century brought ethnic groups to Brazil that cannot be considered homogeneous. In Italy, especially in the North and Northeast areas of the country, the departure of thousands of families allowed for the emptying of a land that had been overpopulated. Immigration appeased the horrible conditions in which the countrymen lived, a consequence of the high taxes and low prices paid for the foodstuff produced by these small land owners⁷. These groups were interested in improving their conditions of survival and did not have an ethnical conscience connected to the idea of an

⁴ C. Ginzburg, *Miti emblematici: morfologia e storia*, Torino, Einaudi, 1986; trad. pt. *Mitos, emblemas e sinais*, São Paulo, Cia das Letras, 1998.

⁵ A 'province' was the name used for the administrative divisions in Brazil at the time prior to the Proclamation of the Republic in 1889, when they were then called states.

⁶ Currently the colonial center of São Caetano is called São Caetano do Sul and Alfredo Chaves is called Colombo. Both municipalities are located in the metropolitan areas of the respective capitals of the states of São Paulo – the city of São Paulo, and Paraná – the city of Curitiba.

⁷ E. Franzina, *La grande emigrazione. L'esodo dei rurali dal Veneto durante il secolo XIX*, Venezia, Marsilio, 1976; trad. pt. *A grande emigração: o êxodo dos italianos do Vêneto para o Brasil*, Campinas, Editora da Unicamp, 2006.

Italian Nation. In Brazil, they were identified as Italians because they originated from the Italian peninsula, but they were venetians. They had regional values, customs and language.

Despite the recurring use of the term *Italians*, it is important to be aware of the need to identify them according to their province. In this article, the *Italian* immigrants that came to the provinces of São Paulo and Paraná in the 19th century are mostly countrymen from the region of Veneto, therefore originating from the provinces of Padova, Treviso, Belluno, Verona, Venezia, Vicenza and Rovigo. Although we have approached this reflection on the ethnical backgrounds and their denominations, in this text we will use the two terms, *Italians* and *venetians*.

These immigrants, on the other hand, brought in the uniqueness of the cultural relations of each region they originated from. Yet, what identifies them as a group is their similar condition determined by their work: they were mostly countrymen. Because of this condition, the social and cultural organization of these immigrants, *contadini veneti*, is based on their search for land, work, and a better life. Thus, life in community created well-defined social roles in the community itself.

This condition of countrymen also fell on the girls, who had to learn early on how to perform their role within the family. The girls had such important and specific duties within family life: washing, ironing, sewing, mending, cooking, embroidering, teaching the kids about moral and religious issues; all activities that were rarely performed by men and also undervalued by them. Motherhood was women's main mission. Women, considered to be the *cornerstone* of the family, were to be in charge of the education of the children, especially in regards to their religious and moral instruction. The perpetuation of this woman-mother role was fundamental for maintaining such family structure.

How would schools contribute to reinforce such roles? How did teachers and their daily know-how contribute to consolidate that role? Even though women's education was already minimal, the few female schools organized or requested by immigrants in their areas should contribute to molding girls for housework. The schools were inspected both by authorities and countrymen to make sure that the instruction and moralization of customs were practiced. For this reason, the good teachers, the ones of good character and prestige with their community, were more deserving of trust by the countrymen.

The countrymen were usually the ones who would ask the government to create public schools in their colonies, and the government, in turn, would nominate a teacher and pay for the rent of the school house. Sometimes a teacher was not nominated by the government, but by the community that would choose someone among its residents to do the job and receive payment from the state.

The origin of all-female schools in the colonies of São Caetano and Alfredo Chaves

At the colonial center of São Caetano, the first teacher was Felicidade Perpétua de Macedo. She worked at the school for two months. On a report dated April 14th, 1883, she asked the General Inspector of Public Education to «deign to provide such school with the furniture and tools needed». The community ended up lending benches and other objects that could be used for the school – in addition to sometimes even lending their own homes⁸. The teacher who replaced Ms. Macedo for the rest of the year was Maria Adelaide do Carmo Machado. In a letter sent to the same Inspector, she commended the students for their willingness to learn. For the girls, the change of scenery, the breaks, the different activities from housework were all an encouragement for their presence. In 1884, the female school received another teacher, Elisa Angélica de Brito Alambert, who remained at the school for three years. This teacher was replaced by Josephina Invernizzi, who had graduated from *Caetano de Campos Normal School*, in São Paulo. She was always very polite in her reports, thanking in advance for any improvements that could be done to the school in the future. In 1894, the new teacher was called Joanna de Almeida Motta, who replaced Ms. Invernizzi after six years of work and many leaves of absence. Ms. Motta had graduated from the same school in the capital of the state four years earlier and remained at the school for seventeen years.

During the time Ms. Motta was the teacher, the school was better provided with furniture. In 1894, it had ten desks, one black board, three benches, three stools and one table. Yet, this teacher, like her predecessor, asked the Principal for new «furniture and tools»⁹ in almost every report.

At Alfredo Chaves, the first all-female school was created in January of 1890. Before then, since 1882, there was a blended school that taught boys and girls. The first all-female school was led by teacher Dúlcia da Costa Saldanha. She asked countless times for tools and school material throughout her time there.

Still in the month of October, the teacher sent two complaints about the lack of materials that were indispensable for her classes, as well as requested a sum of money to cover their expenses. The delay in supplying school material certainly compromised school operations. It is also important to note that there were no descriptions of which tools had been requested in the complaints written by the teacher. Documents that would confirm if such tools were ever delivered by the *Public Education Management* could not be located either. As we may be able to verify ahead, the government would commonly ignore

⁸ E. Mimesse, *A educação e os imigrantes italianos: da escola de Primeiras Letras ao Grupo Escolar*, 2^a ed., São Paulo, Iglu, 2010.

⁹ *Ibid.*

such requests for school material even after the teacher or the School Inspector would ask for them.

According to the reports sent by the teachers to the Inspector in both Provinces, none of such schools met the minimum conditions to teach. In the province of São Paulo they were still called isolated schools. In these schools, the classrooms were not appropriate, schoolbooks were rare, and there weren't always teachers or homes for them to reside in. This situation lasted many years. The excerpts below are from reports by João Chrysostomo Bueno dos Reis Junior, General Manager of Public Education:

Isolated schools generally do not respond to the purpose to which they were created and provided. Such scarce pay, [...] when everyone recognizes that teachers at these unique schools have many more difficulties to overcome. The second issue disrupting school performance is the lack of a building to house their operations. The constant moves and frequent leaves of absence are also issues that disturb the progress of teaching¹⁰.

The wide syllabus also aggravated the learning conditions. Excessive content and lack of books and other school materials contributed to make teaching at isolated schools reduced to a few items that were considered relevant by the teacher. José Monteiro Boanova, School Inspector, described in his report:

Many of the isolated schools fail because of their deficiency. Many teachers select the subjects of the program according to their liking, forming one to their use, which is then sometimes posted on the school walls. The number of schools where Geography, History or even basic Arithmetic was left out is not small. [...] A very common fact in our schools is worth noting: the use of antiquated, outdated books¹¹.

Actually, the problem was not only that teachers were choosing the subjects they wanted to teach. It was also that when they had any school material to choose from, we reiterate, the government did not comply with their requests.

School vestiges in the 'Visitation Reports' written by inspectors to all-female schools

The *Visitation Reports* were preferential sources for the understanding of school routines. The visits by the School Inspector to the all-female school at Alfredo Chaves were frequent. In August of 1891, inspector José Marcelino da Rosa became aware of the difficulties faced by teacher Dúlcia Saldanha. Her school lacked the necessary tools for appropriate classes and the teacher's

¹⁰ Arquivo Público do Estado de São Paulo, *Anuario do Ensino do Estado de São Paulo*, 1911-1912.

¹¹ Arquivo Público do Estado de São Paulo, *Documentos*, 1883-1895.

requests had never been answered. The *Visitation Reports* recorded the lack of these materials, and in an official letter addressed to higher authority, he requested the government to take the necessary steps to handle the situation, as observed below:

Today I visited this school and found it with thirty attending students. According to a brief test of questions, I found them to have had great improvement. Such improvement brings praise to their honorable teacher and her great performance. I noticed the lack of tools, which have not been supplied by the government despite the request sent by the teacher¹².

After this visit, the Inspector forwarded the request to the *Public Education Management*, confirming the need for school tools in face of the great performance of the teacher. This teacher had graduated from the *Normal School* in the city of Curitiba and taken the test to teach in public schools in the Province in May of 1880. After ten years teaching, Dúlcia Saldanha requested the government for teacher tenure.

According to the *Teaching Regulations*, tenure was awarded to teachers who had been teaching for over five years, during which time the students under her responsibility had to be submitted to exams at the end of each year. Her request was denied because of the lack of such exams.

The situation faced by the teacher was a display of the difficulties that, up until then, kept them from fulfilling all the demands of the *Regulations*: the precariousness of the work conditions and the teaching methods, besides the lack of school materials, resulting in the low number of students who were submitted to exams. The conditions put forth in the *Regulations* for acquiring tenure, however, pushed the teacher to work even harder with her students, submitting them to several exams during the time when she taught there. Documents show that Ms. Saldanha began then to test her students yearly. These exams were to be given to students who were properly *prepared*, for it was their performance in the tests that measured how dedicated their teachers were.

We have read comments made by the teachers in regards to the acquisition of school materials in the colonial center of São Caetano and verified that work conditions there were difficult. Reports from 1886 with requests for material and books were frequent because the students' parents could not afford to buy them, for they were «working men, and thus, poor men», according to the teacher. Communication between teachers and students, and consequently, their ability to learn, was hindered because they were «almost all Italians» and had difficulty understanding the Portuguese language. This issue lasted for decades and became widespread as elementary schools subsidized by the Italian government were created in areas where there was a great concentration of immigrants. The goal of Italian schools located in other countries was to «exalt

¹² Arquivo Público do Paraná, *Correspondências do Governo*, 1890-1907.

national education and patriotism», by using the Italian language as a means to keep a strong connection between emigrants and their native land¹³.

The flow and transfer of immigrants among Italian colonies removed students from the rows, and such changes were noted in the teachers' reports with the observation «moved away with the family»¹⁴. It was common for the Italian countrymen to move to another colonial center where they had relatives or friends when they did not adapt to the colony they were designated to by the government. Also, some children had to work. For example, girls helped by doing laundry and boys worked in the field and brick factories. This contributed to the lower attendance of those students enrolled. Teacher Elisa Alambert commented in a report:

The working class, as you know, is not diligent with their children's education. They do not properly evaluate the harm that this neglect causes them and usually make their children work at home, thus lowering their attendance at public schools. That is why sometimes there are students who have been enrolled for two or three years without presenting reasonable improvement¹⁵.

The teacher assumed that the parents made their daughters help them without taking into consideration the daily difficulties that these poor and hard-working immigrants had to survive. There was a Law issued by King Umberto I in 1886 that ruled the age of children of both genders, between 9 and 10 years old, to begin working in underground jobs such as mining. Thus, one could assume that the participation of children in other jobs was usual¹⁶.

Child labor could not be dismissed by adults. Even though they considered it to be important that their daughters received basic education, they still needed their help. Teacher Joanna Motta also wrote in her report in 1894 about the students' continued irregular attendance, but she understood the need for their work at home because their «poor parents cannot dismiss the service that they provide»¹⁷.

¹³ P. Salvetti, *Le scuole italiane all'estero*, in P. Bevilacqua, A. de Clementi, E. Franzina (edd.), *Storia dell'emigrazione italiana: arrivi*, 2 vols., Roma, Donzelli, 2002, pp. 535 ss.

¹⁴ Mimesse, *A educação e os imigrantes italianos: da escola de Primeiras Letras ao Grupo Escolar*, cit.

¹⁵ Arquivo Público do Estado de São Paulo, *Documentos*, 1883-1895.

¹⁶ E. Becchi, *I bambini nella storia*, Roma-Bari, Laterza, 2010.

¹⁷ E. Mimesse, E.C.F. Maschio, *Imigrantes italianos nas províncias de São Paulo e Paraná: diferenças e semelhanças no desenvolvimento dos núcleos coloniais*, «Revista de História Comparada», n. 3, 2008, pp. 56-76.

Final exams at all-female schools: measuring time and learning

At the final exam in 1890, only two of the forty students were selected for the exams of the all-female school at Alfredo Chaves. The students were selected by the teacher among those who were considered ready. The teacher was supposed to select a few students to take the exams within a classroom of students of several ages and different levels of education.

According to the *Exam Terms* of 1890, the students selected to take the final exam came from Brazilian families. This would not occur in São Caetano for there all students were Italian. We can also conclude that it was easier for the Brazilian girls to understand the subjects taught. In Alfredo Chaves, one of the Brazilian students was Cândida Saturnina Saldanha, who was approved with *honor* and the other, Anna Pereira de Fonseca, was *fully* approved. These were concepts applied to the students when the results showed their good performance. It is also necessary to clarify that the exams were based on memorization of the subjects studied – the more the students had memorized, the better their performance. Thus, Italian students would have a difficult time taking the exams since they were not fluent in the Portuguese language.

According to the *Teaching Regulations*, exams were to take place at the end of each year, in the presence of the Parish Inspector or School Inspector and two other teachers appointed by the *Public Education Management*, besides the teacher that managed the school. This fact was confirmed by documents that contained names such as Benedicto Eleutério Cabral and Antonio Manoel Goulart, registered in the *Exam Terms* of the all-female school because they had been teachers for a few years in schools located in villages nearby. Just like them, other experienced teachers who had students who had been approved in the yearly exams were appointed to be part of the final exam board.

At the end of 1891, Dúlcia Saldanha gave another exam. This time nine students, of Brazilian and Italian origin, were tested.

On the third day of the month of December, 1891, this school announces the presence of Literary Inspector José Marcelino da Rosa and the examining teachers Benedicto Eleutério Cabral and Antonio Manoel Goulart, and teacher Dúlcia da Costa Saldanha, to the female students of Villa Colombo. Final and class exams took place according to the current Regulations. The following students took the exam and were fully approved: Antonia Nodari and Joanna Trevisan. The following students took the test in order to be moved up to third grade: Roza Buzato, Aurélia Tosin, Joanna Maschio, Luiza Ceccon, Catharina Ceccon, Cecília dos Santos and Faustina da Soledade¹⁸.

Just like every year, at the end of 1893 teacher Dúlcia Saldanha gave her students another final exam. The last exam given by this teacher was in 1895. According to that year's *Exam Terms*, ten female students took the test:

¹⁸ Arquivo Público do Paraná, *Correspondências do Governo*, 1890-1907.

On the twenty-third day of November, 1895, in this Villa Colombo, a final exam was given at the all-female public school led by teacher Dulcia da Costa Saldanha, at eleven o'clock in the morning, with the presence of School Inspector Francisco Buzatto and the exam board nominated by him, Benedicto Eleutério Cabral, João Romão do Pilar and Maria Tonini. The following students took the test and showed satisfactory abilities, according to the current Public Education Regulations: Antonia Carlesso, Catharina Cavalli, Maria Gertrudes de Araújo and Pedrina Brotto. Antonia Carlesso, Catharina Cavalli and Maria Prestes de Araújo were approved with honor, and Ursulina Cecon, Maria Gertrudes de Araújo and Pedrina Broto were fully approved. They were all equally approved in needlework. The following students took a partial test and were approved to move up to third grade: Joanna Trevisan, Virginia Cavalli, Rosa Tosin and Domingas Mochelin¹⁹.

Comparing this document to the *Exam Terms* of 1891, one could observe that the name Joanna Trevisan is present in both texts. In 1891, this student took the final exam and was approved and awarded. In 1895, however, her name was among those who took partial exams, being approved to the third grade. Three years earlier she had been approved in final exams that made her eligible to start high school. It was probably a mix up with the students' last names: in 1895 there was a student called Joanna Maschio of the same nationality.

The *Exam Terms* allowed for the observation of how often exams were given at the all-female school, as well as notice the growing number of students approved. The frequency in which the exams were given to the students selected by Ms. Saldanha, added to the request for tenure that was denied by the Public Education Manager, are here directly connected to the use of exams as a tool for control of teaching activities by the government.

Another aspect to be mentioned in regards to exams was the «needlework» that took place in all-female schools. The *Teaching Regulations* of 1890, just like the previous statutes, mandated the teaching of «homemaking activities» in the program of all-female schools. «Needlework» was part of the activities taught in this class. In São Caetano, teacher Joanna de Almeida Motta reported an occurrence that interfered with the students' attendance in November of 1895:

In the month of August, this school was victimized by thieves, who took the few books provided by the government, as well as all important work done by the students, even some that were valuable. This brought teaching to a halt for the students were dismayed by the loss and felt discouraged not only with manual work but also with reading. I did not have enough means to appropriately encourage them, thus it is proper to assume that their decision to stop going to school was a consequence of the burglary²⁰.

The burglary was not the only factor that contributed to the students' abandonment, but also the opening of a new hat factory around that same time,

¹⁹ Arquivo Público do Paraná, *Correspondências do Governo*, 1890-1907.

²⁰ Arquivo Público do Estado de São Paulo, *Documentos*, 1883-1895.

which, according to the teacher, needed workers. Almost all the students who were attending the all-female school were hired by the newly opened factory because of their abilities with needlework²¹. The burglary may have occurred because of the beautiful works made by the students, since the «homemaking» class included embroidery and sewing.

The contents, in this case «needlework», were imposed to the schools by the society «around it» and the culture in which «it is immersed». Daily changes interfere in the creation and inclusion of certain contents into classrooms, and these are the components of any school subject. These contents are a «corpus of knowledge, provided with internal logic», organized with specific themes and successive plans that are «clearly distinct, leading to simple and clear ideas»²². Thus, the content of «needlework» interfered with the teachers' activities and daily learning of the students because it was considered relevant to the community where they belonged.

The students made pieces that were useful for their homes, such as: towels with crochet and several different knitting styles, tablecloths and bedspreads. The location of the school at that time – classes were taking place in the house of a well-established family – may have contributed to the burglary.

The teaching profession in the later years of the 19th century

Besides the records contained in the *Exam Terms* and the *Visitation Terms*, other notes about the organization of the school were included in the quarterly maps and enrollment²³, leaves of absence and resignation documents of the teachers of these schools. These documents often included additional information about the students while also showing the poor class conditions and the poor status of the teaching profession in the later part of the 19th century.

Teaching elementary school was just beginning to enter the female world. For women, teaching was an opportunity of work outside the home. In the minds of families, the female individual was more appropriate to receive their trust and teach children because of their connection with maternity.

The role of the teacher in elementary school had a strong link to the role of women and maternity. Since it was natural for women to look after their children, their role as teachers

²¹ Mimesse, *A educação e os imigrantes italianos: da escola de Primeiras Letras ao Grupo Escolar*, cit.

²² A. Chervel, *História das disciplinas escolares: reflexões sobre um campo de pesquisa*, «Teoria & Educação», n. 2, 1990, pp. 177-229.

²³ *Maps* or attendance lists were part of school records. Teachers were supposed to include the number of presences and absences, information on behavior and progress, as well as parents' names and their financial condition.

in school levels dedicated to children also seemed natural. Thus, the connection of the mother role with the one of a teacher was added to other arguments, putting forward the introduction of women into elementary teaching. It is possible to observe that the gradual dominance of women over elementary teaching also involved aspects such as men's abandonment of public teaching because of low wages, the understanding that this was a profession that was socially acceptable for women and also personal choice²⁴.

The provincial all-female schools in the colonies were supplied exclusively by women: young ladies that were teaching for the very first time and older mothers with more time to dedicate to teaching.

On the other hand, the preference for the female teacher in elementary schools did not keep their daily problems away, such as the interruption of classes, lack of school materials and objects.

Classes were interrupted during times when teachers were away on leave, sometimes because of health issues, death in the family or even in the time before the placement of a new teacher. The students' attendance was also irregular, which added to few moments of actual learning. An example is an occurrence at the all-female school of Alfredo Chaves in September of 1892: Ms. Saldanha requested eight days off to take care of health issues, so the all-female school had to be closed.

We could observe that Ms. Saldanha sent documents related to her school activities regularly to the *Public Education Management*. These documents contained information about enrollment and attendance, class and exam grades, and even some observations regarding the students, sometimes explaining why they had been absent.

The *Maps* were accompanied by documents that declared their remittance. One of the reasons for those to be issued by the teacher was that these documents guaranteed her permanence at the school and the continuance of school operations. If we consider that she demonstrated great interest in maintaining her obligations with the school so that she could later obtain tenure, it is understandable that she would not stop producing such maps.

In 1893, João Pereira da Fonseca, District Inspector, checked the all-female school in the city of Colombo. This Inspector noted the attendance of 34 students and praised the performance of the teacher.

Today as I visited the all-female school led by teacher Dúlcia da Costa Saldanha in this village, I was pleased to see the attendance of thirty-four students. After submitting them to a short test, I found them to have shown improvement, which brings me to praise their honorable teacher for her effort in fulfilling her duties as a public teacher²⁵.

²⁴ C. dos S. Souza, *A mulher professora na Instrução Pública de Curitiba (1903-1927): um estudo na perspectiva de gênero*, Mestrado em Educação, Universidade Federal do Paraná, 2003-2004.

²⁵ Arquivo Público do Paraná, *Correspondências do Governo*, 1890-1907.

The notes made by the Inspector regarding Ms. Saldanha became proof of her good performance and dedication. The *Visitation Terms*, as well as the *Exam Terms*, were the main sources for the comprehension of how this all-female school operated. Such documents, however, did not include information to clarify the attendance and improvement of the students, which prevents us from learning about the routine of that school.

In the beginning of 1896, teacher Dúlcia Saldanha requested another thirty-day leave, but this time she did not mention her reason, causing classes to be interrupted again. After her leave, the teacher returned to teaching, but it did not take long for her to request her transfer to another school. Teacher Dúlcia Saldanha taught at this school for six years.

In this manner, the requests for transfers and resignations were constant throughout the states of Paraná and São Paulo²⁶. As we studied the documentation related to these requests, we verified that distance was not a limitation. There were not only teacher exchanges among schools located near each other or near the Capital: the transfers involved schools all over the state. By observing the *Public Education Reports* for the period studied herein, we found that the requests for resignation and transfers were many, meaning that it was common for schools to change teachers.

During the first few months of 1896, the all-female school of Alfredo Chaves remained without a teacher. In March, Maria Joaquina Guimarães, who had passed the teaching admission test, requested to be nominated the teacher for that school. Her request was denied. There are no documents to inform the reason for the denial, despite her being approved for public teaching. Only in May the government nominated Anna Zander for this teaching position, who took the job temporarily. It is important to note that this teacher had not yet finished the course at the *Normal School* in the city of Curitiba.

During this time, the state of Paraná accepted the nomination of teachers who had not finished the *Normal School* for a period of one year. In this case, the nomination of Anna Zander was legal. However, the reason why this teacher was chosen is questionable. One hypothesis justifying the nomination of a teacher who was still in school over one who had graduated and passed admission tests may have been political. It was common practice to have someone use their position to appoint relatives or friends to public positions²⁷. Considering such practice and the denial to that teacher's request, one may suggest that Maria Joaquina Guimarães did not have any political acquaintances in Alfredo Chaves.

²⁶ E. Mimesse, E.C.F. Maschio, *O início da escolarização primária no final do século XIX em dois núcleos coloniais italianos*, «Revista de Educação PUC-Campinas», n. 27, 2009, pp. 109-118.

²⁷ dos S. Souza, *A mulher professora na Instrução Pública de Curitiba (1903-1927): um estudo na perspectiva de gênero*, cit.

It was not possible to obtain information on which kind of relation Anna Zander had with Carlos Frederico Zander, the political representative that occupied the seat at the *City Council*. This possible relation leads us to speculate that this may have been the main factor for her nomination, on top of the fact that Anna Zander already lived in the colony, while teacher Maria Joaquina Guimarães lived in the state capital, Curitiba. Teaching positions in the late 19th century, for being public positions, were filled by appointment, which leads us to believe that such appointments were, in great part, political in character²⁸.

After remaining in the position for one year as it was determined by her contract, on March 26th, 1897, teacher Anna Zander was not re-hired because she had not taken the habilitation test that would allow her to continue teaching in public schools. In her place, teacher Virgília Maria da Silva Netto was nominated, according to Official Letter from 1897, beginning on April 12th. Yet, a few months later, this teacher was transferred to another school.

The position at the all-female school was requested by teacher Francisca Docil da Costa Oliveira, who led the school at colony Zacarias, where many Polish families lived, in the city of São José dos Pinhais. Her request was denied, for Anna Zander had finished her course at the *Normal School* of the city of Curitiba and was already scheduled to be nominated. In November of that same year, Anna requested her definitive nomination to the all-female school informing of her approval in the public exams. Her nomination became effective on January 17th, 1898.

Nine years later, teacher Anna Zander sent a request to the *Manager of Public Education*, asking for her transfer to a co-educational school in another location. After her transfer, the all-female school of Colombo was led by teacher Joanna Falce, starting on July 16th of that same year. Immediately after starting her job, Ms. Falce requested new furniture to School Inspector João Gualberto Bittencourt.

Ms. Falce remained as the all-female school teacher for a short time. She requested to be exchanged with teacher Athália Gomes de Miranda, who taught at the neighboring city, Villa Tamandaré. The exchange was made and teacher Athália Miranda took the position at the all-female school in April of 1908, teaching there until 1910, when she was replaced by Virgília Maria da Silva Netto. This teacher had already taught at the all-female school for a few months in 1897.

Teacher Virgília Silva Netto also taught for a short period of time at that school. On July 20th, 1911 she requested a leave of absence and to be exchanged with teacher Otilia Netto Bastos, from Villa Palmyra. The leave was approved, but not the exchange.

We previously mentioned that, normally, when the teacher requested a leave of absence, classes had to be interrupted. In rare situations, the *Public*

²⁸ *Ibid.*

Education Management would name temporary teachers for the period of absence. Contrary to what usually happened in most schools, during the time that teacher Virgília Maria da Silva Netto was absent she was replaced by Isabel Lopes. This teacher started her temporary job on July 7th, 1911, and became the permanent teacher in September of that same year. The substitution of teachers in times of absence, thus avoiding the interruption of classes, was not common. Even though substitution was regulated by article 92 of the *Teaching Regulations* of 1901, what actually happened was the closing of schools where teachers were on leave.

In São Caetano, the low number of students enrolled in 1910 might be explained by the weak health of the teacher, who was on leave several times during that year and was not always replaced. Joanna de Almeida Motta was absent for a time equivalent to three years, when adding up all her leaves and longer absences. She was substituted by Maria José dos Santos for six months and by Avelina dos Santos for eighteen months. In general, in the first few years of the 19th century, the nomination of substitute teachers became more and more frequent, thus, classes were no longer interrupted when the teacher requested a leave of absence²⁹.

In this context of changes in the educational arena, the first all-female school of Alfredo Chaves moved to its own building in February of 1912. The school building consisted of two classrooms with separate entrances. One classroom housed the female school, and the other housed the male one. The construction of this building was very significant to the progress of the school, since it began operations in its own place, equipped to accommodate students.

Final Words

Based on the analysis of documents it was possible to verify how all-female schools in Alfredo Chaves and São Caetano operated. Among the representations of the need for educating these girls, our study aimed at understanding the gaps of female education in these two Italian colonies.

School exams appeared as tools that were more than evaluations of the students and teachers, they were also bureaucratic tools: means of guaranteeing the teaching position. Also, the *Visitation Terms* were source of information of school activities and poor teaching conditions.

Poor teaching conditions were shown by the lack of physical structures – school material and furniture – and by the students' learning difficulties.

²⁹ Mimesse, Maschio, *O início da escolarização primária no final do século XIX em dois núcleos coloniais italianos*, cit.

Besides, we were able to notice that, throughout the years, the all-female schools reflected ideals of the community and its social condition.

At last, the condition of female teachers is noteworthy. It was a time of new opportunities to the female world, but also still a time of precarious teaching education.

Children and the dark side of Charles Dickens

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ABSTRACT: The children of Charles Dickens are immersed in darkness, the central theme of childhood intrinsically linked to negativity and evil. Dickens affords special attention to the many child characters that populate his novels, becoming a sympathetic 'caregiver', voicing their suffering and revealing their loneliness and anguish. In so doing, the author lifts them from the anonymity and invisibility they suffer in life. For Dickens, childhood is synonymous with abjection, monstrosity, trauma, sickness, neglect, hunger, ill treatment, guilt, abandonment, 'orphanhood', marginalization and death. His vivid heartfelt descriptions sweep away any attempt to censure the representation of deprived childhood. The stories are a mix of social, cultural and literary traditions and Dickens' own lived experience against the backdrop of the moral, educational and aesthetic canons of his time. His child characters stand out as metaphorical portraits, all the more striking for the fact that they give the reader an insight into the inner most feelings of the child. As such, they are key source material for research into children's literature, the history of childhood and educational and psycho-educational investigation into childhood distress.

EET/TEE KEYWORDS: Child at Risk; Child Protection; Conceptual Imagery; Children's and Youth Literature; Literary Criticism; XIX Century.

Introduction

Reflecting on the theme of children in the work of Charles Dickens means first of all having to leave many of them out. For Dickens' children are many. There are thirty odd in *Bleak House* (1853) alone. They peep out from the pages, appear from their hovels pressing against women's skirts. But especially, unlike their fate in real life, Dickens' children stand out, are seen and have being. They do not go unnoticed on the street by absent-minded passers-by who fail to even register their tiny insignificant presence. Indeed the invisibility of children is a key Dickensian theme and one I will return to constantly in the following paragraphs.

The children described by Dickens are too many to name one by one. I will therefore take just a few to illustrate the themes Dickens deals with through children. Not only components of his poetic art, his child characters offer illuminating insights into childhood itself, and how to observe, discover, understand and listen to children. Dickens has given us a priceless gallery of frescoes, carefully drawn in every physical and emotional detail, especially against the backdrop of painfully traumatic situations. They stand as a catalogue of the lost, hopeless child. Dickens reveals the dark side of the world through children. Children are emblematic of the dark side of life, of darkness itself. This is all the more so since a key characteristic of Dickens' children are the secrets they harbour and the desperation that results. But since a secret is such because it cannot be revealed, then to be spoken, the unspeakable must be couched in metaphor and a meta-world created. The secret children hide is almost always a childhood denied. Dickens' children are deprived, unacknowledged, terrorised, oppressed, threatened they will be killed and devoured, wounded, abandoned, offended and mistreated. Their fate is most frequently to succumb, either because they relinquish life or because they are victims of direct or indirect infanticide.

[...] I have often thought that few people know what secrecy there is in the young, under terror. No matter how unreasonable the terror, so that it be terror [...] I was in mortal terror of myself [...] I had no hope of deliverance [...] I am afraid to think of what I might have done on requirement, in the secrecy in my terror¹.

This is how Pip of *Great Expectations* (1861) describes the inner drama that makes his life such anguish. A child alone in a marsh trying to make out the names of his dead parents in a cemetery is the setting for the beginning on his tale. It is both the beginning of a story and an initiatic beginning since it marks Pip's second birth, this time as a writer. Pip's rocambolesque account of his childhood starts among these gravestones. This coming-of-age story, or *Bildung*, opens like a fairy-tale with the unexpected arrival of an ogre in the shape of an escaped convict who threatens to have the boy's heart and liver if not helped. It is the first of many encounters Pip will have in the following chapters with fearful ghostly characters in a series of events, some of them absurd, yet which will all be part of his *Bildung*. In Dickens, fairy-tale and childhood, *Bildungsroman*, adolescence and youth are all episodes in the long journey of the main character, usually a boy, sometimes a girl. The starting point, however, is always the inner self, which these children never shed; they never rid themselves of their childhood. Dickens often resorts to the fairy story structure for his beginnings and endings without, however, undermining

¹ Cited by G. Manganelli in *La letteratura come menzogna*, Milano, Adelphi, 1985, p. 71. C. Dickens, *Great Expectations* (1861), Penguin, London, 1996, p. 17.

the coming-of-age component. Indeed Franco Moretti² pointedly notes how Dickens' fairy story substructure is a decisive factor in the poetic art of an author as much read as he is criticized and accused of leaning to the melodramatic and pathetic, and yet loved by generations for his generous, bulimic ability to give voice to authentic sentiments that otherwise would remain unexpressed. Indeed Dickensian excesses of pathos, sustained by peerless rhetorical ability and a style laden with rhetorical figures of speech – repetition, alliteration, assonance, similes, onomatopoeia, and especially metaphor – are all used to flesh out the author's almost anarchical array of characters. These very excesses afford him great freedom of enquiry into the human soul and allow him to elude the strict Victorian censorship of his times when many subjects were totally out of bounds; Dickens' circumvention of the taboo theme, sex, for example, is superb. Hence the author's predilection for placing the story on a timeless plane. The fairy-tale³, although remaining in the background, provides Dickens with just that otherworld distance. His novels are a weave of tale and chronicle, and part of a literary tradition appreciated then as now by young people and adults, men and women. It is a format that consolidates the link between Dickens, childhood and children and is key to his ability to tell their story. Dickens knew *Arabian Nights*. He used many fairy-tale twists in his stories that are a complex weave of fairy-tale and fantasy-romance set against surreal backdrops but also *faits divers*. He knew instinctively, as Benjamin⁴ would say many years later, that the fairy story is the child's best counsellor and fantasy a constant presence in the experience of childhood. His repeated use of this ancient, universal literary genre is indissolubly linked to his treatment of childhood and is at the core of the Dickensian *ars poetica*. Last but not least, there is the fundamental link between children's literature and the work of Dickens. Dickens, an author of many parts, gives childhood his very special attention. Like children's literature when it sees things from the child's point of view, his is not a distorted image of childhood but an insight into the different world that is childhood. Although Dickens' work is a mix of social comment and autobiography, romance and fairy-tale, novel, fantasy-romance and even the *Newgate Novel* – indeed perhaps because of this volcanic mix of ingredients – his child characters stand out on the page to reveal all their unheeded suffering. Suffering is the mark of distinction, the fundamental characteristic feature of Dickensian childhood described in the decades of rampant capitalism when children were exploited and condemned to

² F. Moretti, *Il romanzo di formazione*, Torino, Einaudi, 1999.

³ M. Bernardi, *Infanzia e fiaba*, Bologna, Bononia University Press, 2007; Ead., *Infanzia e metafore letterarie*, Bologna, Bononia University Press, 2009; E. Beseghi, G. Grilli (edd.), *La letteratura invisibile*, Roma, Carocci, 2011; V.J. Propp, *Le radici storiche dei racconti di fate*, Torino, Bollati Boringhieri, 1985.

⁴ W. Benjamin, *Il narratore. Considerazioni sull'opera di Nikolaj Leskov* (1936), note e commenti di A. Baricco, Torino, Einaudi, 2011.

unhappiness⁵. Surrounded by an Imaginary Dickens helped create, these icons of the suffering child, dialogue with the History of Childhood, the History of the family and social relations and all the other representations of deprived childhood. As we will see, however, Dickens does not turn his attention only to children blighted by poverty. The dark side of childhood that children keep in their breasts is not always dressed in rags, and does not always manifest with the same symptoms. When set against a backdrop of abject poverty, children's suffering is easily recognised by the naked eye even if it may not be understood and the listener must bend down to listen to the rage of a stuttering Pip to grasp the degree of violence perpetrated. But when the suffering is only of the child's inner self, his *intus*, the observer must take even greater care to listen to the interior murmurings of perfect, silent little girls who confide in a doll or little boys who take refuge under a grand piano or hide in an empty kitchen to dance. In such darkness, children are in a condition of *xeniteia*⁶, as Giorgio Manganelli⁷ acutely describes Nell of *The Old Curiosity Shop* (1841). Dickens' children roam in search of an unknown destination, aided only by their own resourcefulness that sometimes fails, and sometimes fortifies them. Those who arrive at their destination accomplish their *Bildung* and reach the end of their novel.

1. Charles Dickens, the caregiver⁸

The vast corpus of Dickens' work is littered with child characters. Their roles are wide and varied depending on the story but they usually enjoy a fairly prominent and functional place in the narrative. However, whether the main, secondary or background characters, children are described with piercing clarity. They literally leap off the page. As literary portraits they are released from the

⁵ L. Trisciuzzi, F. Cambi, *L'infanzia nella società moderna*, Roma, Editori Riuniti, 1989 p. 20; on the condition of children in the history of childhood: Ph. Ariès, *Padri e figli nell'Europa medievale e moderna*, Roma-Bari, Laterza, 1968; E. Becchi (ed.), *Il bambino sociale. Privatizzazione e deprivatizzazione dell'infanzia*, Milano, Feltrinelli, 1979; Ead. (ed.), *Storia dell'infanzia*, Roma-Bari, Laterza, 1996; F. Bacchetti, *I bambini e la famiglia nell'Ottocento. Realtà e mito attraverso la letteratura per l'infanzia*, Firenze, Le Lettere, 1997; L. de Mause, *Storia dell'infanzia*, Milano, Emme Edizioni, 1983.

⁶ The term refers to the complete isolation of pilgrim monks in ancient Christian times. Monks journeyed alone, rootless, in search of an unknown destination, which they would only recognized once they got there.

⁷ G. Manganelli, *Introduzione a C. Dickens, Old Curiosity Shop* (1841), trad. it. *La bottega dell'antiquario*, Milano, Rizzoli, 1959.

⁸ On education: M.G. Contini, M. Manini, *La cura in educazione*, Roma, Carocci, 2007; M. Mortari, *Aver cura della vita della mente*, Firenze, La Nuova Italia, 2002; Id., *La pratica dell'aver cura*, Milano, Mondadori, 2006; R. Fadda, *La cura, la forma, il rischio*, Milano, Unicopli, 1997; M. Fabbri, *Il transfert, il dono, la cura*, Milano, Franco Angeli, 2012.

invisibility and anonymity they so often suffered in the real world, especially during Dickens' time. Dickens gives children an existence through literature, transposing them to a metaphorical, representational level that imprints itself firmly in the reader's mind. Children are afforded an attention they would never have otherwise received in real life or if described in more realistic terms. For although Dickens certainly took the teeming life he witnessed around him as source material for his vast canvas of stories, he re-elaborated and transposed what he saw to a metaphorical level. He is a visionary interpreter of the world rather than a strict chronicler of reality. The author of this vast collection of novels in pure 19th century tradition that encompass the full breadth of different forms of life and death is an enchanter⁹ who allows his characters to «tell their own story, and reveal own mystery»¹⁰. Not confined to the narrow path of their function in the novel, his characters are given ample space in which to make their voices heard. This is the case of the children who are not key figures in the story; they appear from the nooks and crannies of the narrative to make their epiphanic statements. The children in the Dickensian universe come into the world of the narrative at all ages. They are all figures in their own right with a dignity of presence and right to exist even if their lives are snuffed out in an instant and the only thing that remains is a languid mother's grief. Wispy, fleetingly, transparent presences, they are nonetheless characters in flesh and blood, albeit little of either, their vulnerable, uncertain existences painted with incisive, indelible images. Children swarm from every corner, scurry quickly out of sight, stand tearfully for a while or take their first breath for it only to be their last. Indeed new-borns are a special category of Dickensian child. The few who survive early infancy appear in the thin arms of older siblings mature before their time, sisters who have never been children, or with their adolescent mothers, or lie abandoned in poorhouses and orphanages like *Oliver Twist*, perhaps the most popular of all. The trait of being abandoned will stigmatize the baby for life, if he ever has one. If he manages to survive and has the force to try and stay alive, he will struggle everyday in the face of the misfortune that is his lot. Dickens draws a clear parallel between abandonment and solitude and these children's invisibility. It is a recurring theme but never so well summed up as in this passage:

[...] and the lonely figure on the bed, whose path in life has lain through - and -forty years, lies there, with no more track behind him that any one can trace, than a deserted infant [...]¹¹.

⁹ V. Nabokov, *Lezioni di letteratura* (1980), Milano, Garzanti, 1982.

¹⁰ C. Pagetti, *Introduzione a C. Dickens, Little Dorrit* (1857), trad. it *La piccola Dorrit*, Torino, Einaudi, 2003, p. vii.

¹¹ C. Dickens, *Bleak House* (1852-1853), Penguin, London, 1996, p. 173; trad. it. *Casa Desolata*, Torino, Einaudi, 1995, p. 143.

If he survives, the orphan risks total invisibility in the real world; he is no one, nobody. On the page, however, he has an existence. The story embraces him and tells his story. By the same token, the new-born that dies gives life to the child character that dies at birth. The death of the baby girl, a frail ghost, and the inconsolable grief this causes are evoked by Dickens without restraint:

Ah, what a gift that baby is to you, Johnny!» said his father [...] «but it is a fact ascertained, by accurate calculations, that the following immense percentage of babies never attain to two years old; that is to say¹².

The sorrow for the loss of an older child is all the keener because its earlier survival had already been a gift. In the seminal scene of *Bleak House*, the grieving mother looks at her baby in her lap, but «the child died»¹³.

She lifts the little body and lays it down, covering it with her handkerchief. The reader is filled with compassion and grief. Clearly, this particular dead child has a multiple role in a novel crowded with children. He is a burden of grief for the mother, his benefactors, society that makes the poor destitute, for the empathetic reader and for family affections that fall away in the face of grinding poverty. With the heartrending account of the mother's grief at the death of her new-born child, Dickens seems to suggest that caring for children may withstand the imposition of having to live from hand to mouth. The negation of sorrow wrought by poverty seems here negated. His style veers no little towards pathos but does not, however, dampen the unbearable tragedy. The dead baby attains angelical status for the fact of its premature death. Esther says: «I only thought that perhaps the Angel of the child»¹⁴.

Esther's protective gesture of covering her dead child's body with her handkerchief paves the way for developments in the novel that will lead to the discovery of the mystery of her birth. The handkerchief which still covered the «poor baby»¹⁵ is the connection between Esther, a child who should never have come into the world and a mother who thought her child stillborn. The death of a child also reveals the crumbling of family affection in the face of poverty and lays the blame on an unjust society, unfeeling towards the weak, first among these, children. It also alludes to another central theme of the Dickensian *ars poetica*: the crime of being born into an uncaring world. The loss of small children creates a sense of guilt that more often than not falls to the mother. Many subsequently die in misery atoning for their unforgivable sin. For their part, orphaned babies fall into the abyss of the primordial state of 'orphanhood'. For Dickens, this is especially the lot of women and children. He

¹² C. Dickens, *The haunted man and the ghost's bargain, A fancy for Christmas-time* (1848); trad. it. *L'invasato e il patto del fantasma, Una fantasia di Natale*, traduzione e prefazione a cura di Marisa Sestito, Venezia, Marsilio, 2005, p. 123.

¹³ Dickens, *Bleak House*, cit., p. 134.

¹⁴ *Ibid.*, p. 136.

¹⁵ *Ibid.*

looks with compassionate at these victims of violence and injustice. Yet both his storyboard and the society he describes require the sacrifice of innocent creatures destroyed by guilt and shame. Unable to return to society, mothers fade away, overwhelmed by reproach and scandal. Children, many almost fairy-tale characters, set out on their solitary pilgrimages in a state of *xeniteia*. Both the children who survive and those who die at birth reflect the theme of coming into the world and of one's origins, themes that are inextricably linked to those of abandonment, 'orphanhood', the parent child relationship, and the different hues of affect that colour human relations even in the phantasmagorical or bestial world Dickens often paints. In *The Haunted Man and The Ghost's Bargain* (1848), for example, the loss of a child so profoundly marks the mother, Milly, that she is transformed into a figure of quiet resignation. It is evident that such apparent serenity is the result of immeasurable, intolerable distress and signals a person inured to any further sorrow. The poor, worthy Milly becomes a fairy godmother, an adoptive mother for all children in distress. In her own words: «The innocent thing that never lived on earth, is like an angel to me»¹⁶ who intercedes for abandoned children on earth. As a female character, Milly is unreal and borderline credible, not a typical example of the mother who loses her child. Rather she is the symbolic, ideal Mother, a metaphorical figure of great importance for the author. In this delicate area of basic human relations, Dickens is here presumably also talking about his own unhappy childhood and sorrowful relationship with his mother. Besides the many babies, there are hordes of older children that populate Dickens' world. In perpetual frenetic movement, they are mistreated and abused. Little girls of five already perfect little women, illiterate servant girls, orphans fallen into prostitution, girls disowned by their families, the wild nameless boy, the crossing sweeper who lives on the edge of a cemetery, children driven from home, adolescents gone astray – they are all children alone. They form an array of characters, from the most colourfully drawn to the barely sketched out, all branded with the mark of pain and woe. All have a recognizable place in the narrative of which they are part. The story includes them, not dismissing or diminishing them. The pointed attention Dickens gives to children seems an attempt to compensate for the lack of attention and consideration given them by a society that down the ages has developed different historical social and cultural ways of oppression.

It is almost as if Dickens had appointed himself the caregiver of deprived children, who in real life as in his novels all suffer dramatically from a lack of attention. The enchanter's¹⁷ message is that children exist, that they have needs, and are often the victims of unspeakable violence.

¹⁶ Dickens, *The Haunted*, cit., p. 262.

¹⁷ Nabokov, *Lezioni di letteratura*, cit.

Judy never owned a doll, never heard of Cinderella, never played at any game. [...] And her twin brother couldn't wind up a top for his life. He knows no more if Jack the Giant Killer, or of Sinbad the Sailor, than he knows of the people in the stars. He could as soon play at leapfrog, or at cricket, as change into a cricket or a frog himself¹⁸.

We are struck by Dickens' keen observation of children and their lives as he witnessed them in his own time. Many passages attest to his close contact with the world of children and their unheeded needs as well as the manner in which some children, despite everything and despite adults, succeed in saving themselves by grabbing the least opportunity. Yet, whether forced to relinquish their childhood well before the age of eight and face a hellish world, sometimes even from the inside of a jail where they were born¹⁹, or escaping the clutches of stepfathers²⁰, leaving persecutors²¹, running away from a band of cruel brothers²², or withstanding the beatings of a harsh sister²³, they are nonetheless still only children. Children robbed of their childhood. They have been denied the time to play, dream, fantasize, read and study.

Dickens shouts this at every opportunity. His little Dorrit who «[...] sat in it dressing and undressing a doll – which soon came to be unlike dolls on the other side of the lock [...]»²⁴ will soon have to look after her father and siblings and other prisoners by taking in backbreaking sewing work. Dickensian childhood is no childhood, just as it was for the author himself who suffered the traumatic experience of being forced by his parents to go out to work when he was only about twelve years old. Debtors prison took his father; hate and recriminations ruined his relationship with his mother, condemning Charles to a terrible fate: having to leave school, leave his family and become part of the doleful grey horde of factory children.

The time of childhood is stolen in many ways: inside the freezing slums rooms where poor families huddle, as well as inside elegant drawing rooms where gelid interpersonal relations are the norm and visitors are stiffly entertained to tea. In both cases, childhood and children cease to exist. Children are almost only given citizenship in literature. It is here that they attain a different, metaphorical dimensional that never, however, negates or softens the cruelty to which they are subjected. At the beginning of *The Old Curiosity Shop* (1840-41) we read:

I turned hastily round and found at my elbow a pretty little girl, who begged to be directed to a certain street at a considerable distance, and indeed in quite another quarter of the town. [...] For my part, my curiosity and interest were at least equal to the child's, for child

¹⁸ Dickens, *Bleak House*, cit., p. 355.

¹⁹ C. Dickens, *Little Dorrit* (1857).

²⁰ C. Dickens, *David Copperfield* (1850).

²¹ C. Dickens, *Oliver Twist* (1837).

²² C. Dickens, *Bleak House* (1853).

²³ C. Dickens, *Great Expectations* (1861).

²⁴ Dickens, *Little Dorrit*, cit., p. 96; trad. it. *La piccola Dorrit*, Torino, Einaudi, 2003, p. 90.

she certainly was, although I thought it probable from what I could make out, that her very small and delicate frame imparted a peculiar youthfulness to her appearance²⁵.

At this stage of the novel, Nell has not yet had to forego her childhood and grow up too early to face the tasks life assigns her. Nor is it very clear whether she is a child or a slip of a girl. However, she is soon to lose her childhood even if Dickens, with his unmistakable storyteller touch, gives the meeting with their stranger who takes her hand and says he loves children the aura of a fairy-tale. A careful reading will reveal similes with stories of little girls and wolves. Nell is kept, however, in an unreal dimensional, as shown by the description of her hiding place, a tiny hole in which a fairy hides. She, Nell, like a fairy will vanish – or die – the moment the story comes full circle.

Preceding me with the light, he led me through the place I had already seen from without, into a small sitting-room behind, in which was another door opening into a kind of closet, where I was a little bed that a fairy might have slept in, it looked so very small and was so prettily the old man and me together²⁶.

From the outset Nell is a creature from another world. Dickens gives her a metaphorical, fairy story dimensional from the start, inhabiting an in-between world of spectral figures. In contrast, other children in Dickens' world are earthlings, wild and untamed by the fate they have been dealt. These children bite, tear at skirts and lash out to avoid being beaten. They are inconsolable until they meet a character like Esther, the narrating voice of *Bleak House* who tells these little demons fairy stories. Tiny Peepy is the most desperate and the most in need of them all. He clings to Esther not because he is an orphan without parents or siblings but because he has a family from which he receives no love. Peepy is the perfect example of 'orphanhood from within', the child living in an affective void. Esther consoles, hugs, cares and looks out for the child. A caregiver like the author, she understands children and their desperation and «that to prevent myself from being quite torn to pieces I was obliged to fall back on my fairy tales»²⁷.

Dickens' words sketch indelible pictures of his children for his readers. He describes their hunger, ill-treatment, begging, filth, crying through gritted teeth, the injustices suffered, the rare opportunities for play or escape, the spiteful behaviour and fights, their lonely fantasies, hiding places, the constant looming fear, and the degradation of violence. What the reader hears is the child's view of both himself and the world. As the representative of adult society, we should feel the tug of responsibility towards children, not to control or oppress but to protect, educate and look after.

²⁵ C. Dickens, *Old curiosity shop* (1841), Penguin, London, 2000, pp. 11-12; trad. it. *La bottega dell'antiquario*, cit., p. 55.

²⁶ *Ibid.*, p. 14.

²⁷ Dickens, *Bleak House*, cit., p. 384.

These portraits constitute, as has often been noted, an indictment of society, and are, at least in some small way, an attempt to compensate for all of those unseeing eyes that have pretended not to notice. For the purposes of educational literature and its take on the history of childhood, children's literature and how children are themselves represented in literature, Dickens' portraits of children and their suffering stand out as a vast catalogue of icons that have become part of the Collective Imaginary. As icons they stand centre stage, children in desperate, dangerous and difficult situations on account of indifference and neglect. Oliver, David, Pip, Jo, Esther, Charlie, Peepy, Dorrit, Nell, the little Tetterbys²⁸ and others live on the border between the tolerable and the intolerable, the human and inhuman, or in Dickensian terms, between human and beast. Dickens makes his readers look at the appalling and acknowledge the different factors that give rise to such childhood suffering. Reading Dickens from an educational standpoint can help the reader gain awareness and encourage him not to turn away.

Dickens' child characters gained a permanent place in the literary and narrative Imaginary of the 19th century popular novel written at a time, as Antonio Faeti²⁹ points out, when people lived in anguish and horror at the constant threat to real children dying of overwork, deprivation misery and Poverty (Dickens uses the capital letter), being put out to work, abandoned and having to live in abject conditions.

The ultimate metaphorical representation of childhood deprived, these children have been widely represented on the screen³⁰ returning in cyclical fashion to consolidate the image of the vulnerability of children. In the film versions though, the most popular characters are more likely to achieve redemption in the closing scenes. Oliver and his street urchins have been the subjects of several remakes showing the external degradation of 19th century slums along with the intimate, hidden mortification of the characters wrestling with unspeakable issues. We are shown their constrained lives, rare joys, violent death and the toil

²⁸ The characters referred to come respectively from the following novels: *Oliver Twist* (1837-1839), *Oliver Twist o la vera storia di un orfanello*, Milano, Rizzoli, 1981, *Introduzione* di A. Brillì; *The Personal History, Adventures, Experience, and Observation of David Copperfield: The Younger of Blunderstone Rookery (Which He Never Meant to be Published on Any Account)* (1850), *David Copperfield*, Milano, Garzanti, 1982; *Great Expectations* (1861), *Grandi Speranze*, Milano, Garzanti, 1984, *Introduzione* di M. Sestito; *Bleak House* (1853), *Casa Desolata*, Torino, Einaudi, 1995, con un saggio di V. Nabokov; *Little Dorrit* (1857), *La Piccola Dorrit*, Torino, Einaudi, 2003, *Introduzione* di C. Pagetti; *The Old Curiosity Shop* (1841), *La bottega dell'antiquario*, Milano, Rizzoli, 1959, *Introduzione* di G. Manganelli; *The Haunted Man and the Ghost's Bargain* (1848), *L'Invasato e il patto del fantasma. Una fantasia di Natale*, Venezia, Marsilio, 2005, a cura di M. Sestito.

²⁹ A. Faeti, *La casa sull'albero. Orrore, infanzie in Stephen King mistero, paura*, Trieste, Einaudi ragazzi, 1998.

³⁰ About the relationship between the cinema and the works of Dickens see: A. Faeti, *In trappola col topo*, Torino, Einaudi, 1986; M. Bernardi, *Il Cassetto Segreto*, Milano, Unicopli, 2011.

of redemption. We are confronted with a close-up of the unspeakable conditions of children. By far the most potent images have been created by G. Cukor in *David Copperfield* (1934) and by D. Lean's *The Adventures of Oliver Twist* (1948) and *Great Expectations* (1946). Roman Polanski's *Oliver Twist* (2005) in many ways is a tribute to the dark frescoes of Lean.

Other child characters of classical and contemporary children's literature and film hark unmistakably back to the Dickensian portrait. One recent example is the boy, Hugo Cabret³¹, a graphic novel character turned into a movie by Martin Scorsese in 2012. Hugo is another remake of the theme of 'orphanhood' and abandonment. However, Scorsese places the accent on the character's resilience and determination to make good, his tenacity in holding on to life. Despite a life of solitude and exclusive self-reliance, Hugo does not give voice to the devastating pain of living that was the lot of his literary ancestors. He is armed with a system of defence and survival. Although his brothers in former times might well have been equally resourceful, for them taking action in their circumstances required a superhuman effort that was often beyond them. For the children of Dickens' age were all in extreme situations.

On the Dickensian map, children often find themselves on the edge of the extreme, where living amounts to just surviving and the boundary between just surviving and death is a very fine one. Indeed, the abject, the tragic, the angelic and the sublime are all to be found on that same thin dividing line. As Andrea Tagliapietra points out, like the abyss, the sublime also looks beyond all boundaries and by the same token implies the end, the abyss³².

The end, a metaphor for a boundary crossed, is also a limit beyond which lie perilous worlds we dare not face. The unknown is such, not because it is not known or unfathomable but rather because we do not want to recognize or see it. As Freud pointed out, going beyond the line of the familiar and the known, we venture into unfamiliar, disturbing territory. Areas at the limit of our world lead to the disturbing, and at times open onto the abyss.

Dickens takes us to the abyss with his child characters. He takes us out of our comfort zone and into less familiar, less endurable territory just as he takes his children to extreme and sometimes fatal regions.

The *caregiver* author seems to want to give childhood back its original nobility, whatever the circumstance – tragic, ironic, dramatic or comic – whether raising them to beatification as exemplars of kindness or finding them in the mud, frenetic animal like creatures like the *baby savage*, or *young monster*. Dickens' child characters are his most effective symbolic portraits. It is almost as if the mystery of childhood best captures the scandalous, the anomalous, the improbable, the inexplicable, the inhuman, the surprising, the indecent, the

³¹ B. Selznik, *La straordinaria invenzione di Hugo Cabret*, Milano, Mondadori, 2007.

³² A. Tagliapietra, *Icone della fine. Immagini apocalittiche, filmografie, miti*, Bologna, il Mulino, 2010.

unsupportable and the unattainable in any life experience for good or for bad. Especially for bad. For the hell Dickens so often recounts is densely inhabited by little girls and boys. Their disturbing and incongruous association with evil is described in memorable terms thanks to his brilliant powers of observation and fine ear for their thoughts and feelings, registering their little lives with unmistakable clarity. In Dickens, the indecent amalgam of childhood, pain and loss is a constant feature. The sphere of negativity surrounding his child characters affords them a heartrending pathos that is mixed with horror, terror and repugnance. Protagonists and eyewitnesses of extreme situations, Dickens' children appear immediately helpless before the abyss that awaits them.

Yet inevitability is not always the case. The author spurs many of his child figures not to abandon the fight, weaving into his plot many propitious encounters that in some cases will lead to a decisive turnaround in the child's fate, to acknowledgement, reward and a happy ending. In other cases, the glimmers of hope only reinforce an inexorable tragedy, an allegory that once set in motion must come full circle.

Prisoners of a hell on earth, locked into realm of fear, violence and injustice, any young children who survive and make good will do so by dint of meticulous dedication, spirit of sacrifice, forbearance, tenacity and incomprehensible wisdom. Not all succeed, of course. Happy endings are not for everyone. Some succumb and die very early, others do so halfway through the novel, while others sink into the abyss of crime and ruin. Although the master of happy endings that puts everything right, Dickens is also a clever craftsman of the bitter ending, the tragic twist, the unexpected disappointment and the miracle that never happens. Indeed, these inexorably tragic endings stand in counterpoint to examples of other children's resilience and resourcefulness and their ability to defy a preordained destiny that would otherwise drag them under. In literature, symbolic triumph over the real-life order must be sustained by its opposite.

2. *The dark side of Dickens: evil, death, monstrosity, abjection*

A bundle of tatters, held together by a hand, in size and form almost an infant's, but, in its greedy, desperate little clutch, a bad old man's. A face rounded and smoothed by some half-dozen years, but pinched and twisted by the experiences of a life. Bright eyes, but not youthful. Naked feet, beautiful in their childish delicacy, ugly in the blood and dirt that cracked upon them. A baby savage, a young monster, a child who had never been a child, a creature who might live to take the outward form of man, but who, within, would live and perish a mere best³³.

³³ C. Dickens, *The haunted man and the ghost's bargain, A fancy for Christmas-time* (1848), trad. it. *L'invasato e il patto del fantasma, Una fantasia di Natale*, a cura di M. Sestito, Venezia,

This powerful portrait of the nameless child in *The Haunted Man and the Ghost's Bargain, a fancy for Christmas time*, «the savage thing»³⁴ huddled like an animal is the first of a whole gallery of vivid, unforgettable child characters that remain impressed upon the minds of all Charles Dickens' readers. He continues:

It chilled his blood to look on the immoveable impenetrable thing, in the likeness of a child, with its sharp malignant face turned up to his, and its almost infant hand, ready at the bars³⁵.

We are taken rudely into a shocking world, a dark side where evil reigns in its many terrifying and disturbing versions. Of these, the most unthinkable is the evil that transpires on the face of what appears, but might not be that of a young child. Undefined and definable, this *baby-monster* is a fitting character for a Christmas story that in true Dickensian tradition is always full of ghosts and phantasmagorical presences. Appropriately, it is the ghost – the death image of the main character – who will approach this strange being, the product of indifference, and reveal the utter desolation caused by the absence any memory or sentiment. The wise ghost stands as society's conscience, pointing the finger at every Englishman for abandoning the poor, especially children, to their dreadful fate. This «immoveable, impenetrable thing» that allows no one to touch it, a traumatised savage living in a social and interior exile bordering on autism embodies the state of absolute desolation and loss from which the professor, the main character in the novel, suffers. The duo brings to mind Stevenson's extraordinary tale of a dual personality that was to be published forty years after Dickens' ghost. As Marisa Sestito³⁶ points out, it is the savage child rather than the ghost-conscience to reveal the ugly fury of the stray animal whose rage derives from an utter absence of love and meaning. Here, there seem to be three characters, not two as in the story of Jekyll and Hyde.

This monstrous, savage child that the Italian translation has softened by calling him a 'puppy', is a powerful, persuasive and pervasive representation of the extent to which childhood is linked to desperation, marginalization and abjection in the poetic art of Dickens.

Literature and especially Dickens anticipated a recurrent theme that was to preoccupy late 19th century society: the persistence of animal behaviour in humans³⁷. Children were observed and studied as creatures accomplishing the

Marsilio, 2005, pp. 102-104.

³⁴ *Ibid.*, pp. 176-177.

³⁵ *Ibid.*, pp. 174-175.

³⁶ Sestito, *Introduzione a The haunted man and the ghost's bargain, A fancy for Christmas-time*, cit., p. 35.

³⁷ C. Bonomi, *Sulla soglia della psicoanalisi. Freud e la follia infantile*, Torino, Bollati Boringhieri, 2007; G. Grilli, *Bambini, insetti, fate e Charles Darwin*, in E. Beseghi, G. Grilli (edd.), *La letteratura invisibile*, Roma, Carocci, 2011.

transition from animal to human, from nature to culture. There was speculation about the stage at which children first developed an awareness of moral principles. It was a debate that did not focus, however, on the 'real' child. Views ranged from the extremely negative picture of an instinctive, ungovernable animal to idealistic concepts of purity and innocence. Dickens' child monster is a tragic embodiment of that Victorian dilemma. The caregiver author lifts the veil on the filthy slums where these bestial, monstrous children huddle, grotesque figures, symbolically without a name, defending themselves tooth and nail in a primordial fight for survival, expecting assault from all quarters. These twisted, crouching children are summed up in the extreme figure of this animal child. It is one of the most disturbing portraits in the whole of Dickens' work.

It was sad to see the child who had no name or lineage, watching the other children as they played, not knowing how to talk with them, or sport with them, and more strange to the ways of childhood than a rough dog³⁸.

With masterly strokes, Dickens paints the picture of a bundle of rags using, as is his wont, a series of highly effective, contrasting images typical of his love of repetition and crescendo in a breath-taking, exquisitely cinematographic description. The savage child leaps from the page, fixing itself in the imagination of the reader and recalling the superb illustrations of Hablot Knight Browne – Phiz – Dickens' illustrator of the poorest of the poor. As the Dickens himself says, the creature is without hope; it will remain outside the realm of the human. The creature stands for everything that is incongruous, unacceptable and disturbing. It represents childhood and old age, childish tenderness and the horror of decrepitude, the delicacy and appeal for help of a child, but at the same time the bitter, brutal wickedness of the old man. Repugnant and monstrous, it undermines the image of childhood sweetness, sullyng the image of childhood purity, a grotesque marginalized figure of abjection. We remain speechless before this horror and want to turn away from a being that defies our concept of childhood and our protective leanings. Already wizened like an old man, this little monster is beyond all hope, an example of what happens to children if they are uncared for and left alone. It is a warning that Dickens sends us through the voice of the ghost.

For Dickens, the old have a lot to account for in terms of cruelty, vindictiveness and decrepitude. Often, however, like their child counterparts, they too are either angelic or demonic, icons of monstrosity.

Like filth and squalor, the monstrous is also close to abjection. It is the refusal of the body, of self, of the other. Julia Kristeva interprets abjection as the attempt to expel one's own self, that self one cannot accept since it is the very source of

³⁸ Dickens, *The haunted man*, cit., pp. 268-269.

abjection. It is the violent lashing out against all internal and external threats that are experienced as ever looming. Abjection, Kristeva believes, distances from self in an intolerable way³⁹. This is the plight of the monster child, and the reason for his cry of pain and rage. Deprivation is a key component of abjection. Deprivation is the essence of the animal child, the basic reason why he has been cast into the realm of the non-human. He has no command of language; he speaks in hostile broken phrases. He has no sense of his own life, no name; he is an absolute orphan: of parents, background, society, and the world. Like all Dickensian orphans, the baby monster has been deprived of any acknowledgement of his being that would give him a place among the living, and later on among the dead. The theme of being nameless is linked to that of identity. Being defrauded of a name cancels out the person. A fundamental element of the fairy story⁴⁰, names and children are also a key feature of the huge human fresco painted by Dickens. Nameless children living in a limbo of uncertainty symbolize the vulnerability of childhood, especially when this is undermined by poverty. These nameless children await a pronouncement regarding their likelihood of survival. They are not given a name until they are one year old or even more, depending on the culture, to ward off the sorrow of losing a child. But the absolute orphan, huddled in his rags, described by Dickens with «feral» images⁴¹, demonic, the object of «repulsion and fear»⁴², treated like a stray dog, will never have the right to a proper name, or ever to be admitted to the human community in defiance of society's taboos. Julia Kristeva describes this as being in the territory of the 'Improper', one of the characteristics of abjection. Improper is other than 'Proper'; it is repulsive, disgusting and hence rejected since outside and beyond the scope of the thinkable. In Heidegger⁴³ too, the Proper is that which is authentic and specific to human being. By the same token, the Improper is that which does not belong, is not, is cast out from self, and in opposition to self. The nameless child is Improper to himself as well as to his fellow men. He has no name. He is in utter contradiction to Victor Hugo's epithet: «No Beast is there without glimmer of infinity, No eye so vile nor abject that brushes not against lightning from on high, now tender, now fierce»⁴⁴. That 'glimmer of infinity' returns us to the question of extremes, and so to the abyss and, by the same token, to the theme of the sublime: the sublime of both good and evil. The nameless child, the personification of evil, is taken in by the exemplar of good, Milly, the bereft mother. As Marisa Sestito accurately

³⁹ J. Kristeva, *Poteri dell'orrore. Saggio sull'abiezione* (1980), Milano, Spirali, 2006, p. 7.

⁴⁰ M. Bernardi, *Infanzia e metafore letterarie. Orfananza e diversità nella circolarità dell'immaginario*, Bologna, Bononia University Press, 2009.

⁴¹ Sestito, *Introduzione a C. Dickens, The Haunted man*, cit., p. 29.

⁴² *Ibid.*

⁴³ M. Heidegger, *Il concetto di tempo* (1924), Milano, Adelphi, 1998.

⁴⁴ V. Hugo, *La légende des siècles*, cit. in Kristeva, *Poteri dell'orrore. Saggio sull'abiezione*, cit., p. 2.

notes, the child monster and Milly are «two fortresses»⁴⁵ of evil and good, and as such they «remain pure»⁴⁶.

3. *Childhood and darkness*

The dark side of Dickens is expressed with intense narrative vigour and imaginative language when it is children and their plight that trigger the complex, disturbing questions of man's relationship with evil, darkness and death. The poisons of poverty, ignorance and neglect that lurk in this zone of darkness are all the more lethal when children are involved.

The work of Dickens is imbued with a gallery of sinister, grotesque pictures that are only apparently alleviated by humour. But as Giorgio Manganelli notes, Dickens indulges more often than not in «gallows humour»⁴⁷, dark, sarcastic and sardonic as he lifts the folds to reveal a dark world, often inhabited by children. Children are the vehicles through which Dickens examines the themes of evil, monstrosity, death, anonymity, 'orphanhood', abandonment, abjection and extremes, and denounces social injustice, child labour, ill treatment, violence and ruin in a spectral world.

While the savage *baby-monster* embodies the indefiniteness of utter desolation, other young children represent different characteristics of negativity.

Dickens' lexicon and imagery to describe the themes of darkness return again and again. The reader is presented with filth, ragged clothes, dirty, excrement, swarms of flies blackening walls, dim light, shadows, spectral figures, lugubrious nights, cemeteries, abandonment, orphans, poverty, black misery, hunger, solitude, disease, agony, delirium, nightmares, death, sewers, lies, blackmail, violence, cheating, injustice, cursing, betrayal, mediocrity, malevolence, abuse, suffering, pain, humiliation, piety, blame, crime, shame, atonement, silence, submission, criminal sentences and the gallows.

Theme and imagery meld as Dickens paints a gloomy and sooty fresco that is partly the fruit of his imagination, partly modelled on real-life people dragging out their existence.

«It is said that the children of the very poor are not brought up, but dragged up»⁴⁸, says a character in *Bleak House*.

A sombre testimonial of this is Jo, the young crossing sweeper who inhabits the neighbourhood known as Tom-all-Alone's in the sprawling London of *Bleak House*. Jo sweeps the streets before passers by to eke out a living. He

⁴⁵ Sestito, *Introduzione a Dickens, The Haunted man*, cit., p. 20.

⁴⁶ *Ibid.*

⁴⁷ G. Manganelli, *La letteratura come menzogna*, Milano, Adelphi, 1985, p. 68.

⁴⁸ Dickens, *Bleak House*, cit., p. 88.

begs and huddles in doorways near a cemetery. He has nothing, knows nothing. An orphan like the savage child, he too is a stray animal, unwanted, hustled and jostled and told to «move on». Jo has no place where he can be, and so like other ragged children slinks from one street to another.

O! Here's the boy gentlemen! Here he is, very muddy, very hoarse, ragged. Now, boy! – [...] Name, Jo. Nothing else that he knows on. Don't know that everybody has two names. Never heard of sich a think. Don't know that Jo is short for a longer name. Thinks it long enough for *him*. – *He* don't find non fault with it. Spell it? No. *He* can't spell it. No father, no mother, no friends. Never been to school. What's home? Knows a broom's a broom, and knows it's wicked to tell a lie. Don't recollect who told him about the broom. Or about the lie, but knows both. Can't exactly say what'll be done to him arter he's dead if he tells a lie to the gentlemen here, but believes it'll be something wery bad to punish him, and serve him right – and so he'll tell the truth⁴⁹.

Hauled up before a sententious magistrate, Jo appears even more misfortunate. His refrain is «I don't know nothink» as he wipes his filthy tears. And he does know nothing; he is too poor to know anything. He repeats this whine to the administrators of justice who have heard it all before. Jo's invisibility is even more blatant. Like the dirty ragged baby monster, he too is undernourished and sickly. Even his tears are filthy, and like his fellow orphans, he too grips a filthy cap, in the same way the savage child hugs his bundle of rags. They cling to castoff clothes, their only possessions. Dickens gives us a vivid sense of deprivation in these children's fierce attachment to their second skin, however worn and filthy. It is their only means of self-defence to ward off further deprivation. They have nothing and know nothing because they are, and believe, as Jo himself is made to say, they are nothing. Dickens is unsparing in the harsh images with which he describes abandonment, suffering and abjection that lead to annihilation. We see Oliver lying wounded and sick in a hovel while others plot his murder. A lonely child takes refuge in the oblivion of sleep and sickness, owning nothing but his own despair. Jo at least has some sort of name and owns a broom. But his name, for which he can give no reason, is almost a non-name. By the same token, Pip at the beginning of *Great Expectations*, when still a whimpering child, tells readers how he invented a name for himself from these sounds.

Unlike Pip, however, Jo will not make it. As well as functional to the storyline, Jo's death is also a means of turning him into an icon of young death, the fateful victims of cruel injustice and utter degradation in abject poverty, the poorest of the poor as Jo himself recognizes⁵⁰. His death is quite different from those of other children whom death raises to angelic status to become metaphors of eternal youth.

⁴⁹ *Ibid.*, pp. 176-177.

⁵⁰ *Ibid.*, pp. 261.

Jo's death is already a certainty by the time Dickens dedicates chapter 16 of *Bleak House* to him.

Jo lives – that is to say, Jo has not yet died – in a ruinous place, Known to the like of him by the name of Tom-all-Alone's. It is a black, dilapidated street, avoided by all decent people... [...] – «For I don't», says Jo «I don't know nothink» – It must be strange state to be like Jo! To shuffle through the streets, unfamiliar with the shapes, and in utter darkness as to the meaning, of those mysterious symbols, so abundant over the shops, and at the corners of street, and on the doors, and in the windows! To see people read, and to see people write, and to see the postmen deliver letters, and not, to have the least idea of all that language – to be, to every scrap of it, stone blind and dumb! [...] I must be a strange state, not merely to be told that I am scarcely human [...] but to feel it of my own knowledge all my life!⁵¹

The author ponders what strange notions illiterate Jo must have of the social system – judges, government, bishops and the constitution, this latter, for all he knows, might even be a jewel! But Jo knows nothing about anything in any shape or form. Knowledge is denied him. He toils from dawn to dusk to earn a filthy crust of bread; even his bread, the author notes, is soiled, as if to underline how far this child is from any likelihood of being admitted to the human community, and in consequence, how inevitable is his strange terrible destiny. Jo is often described as 'strange'. He is strange and extraneous, hardly acknowledgeable as human were it not for his mild temperament. Abandoning all whimsy, Dickens calls him one of the «inferior animals» hiding in Tom-all-Alone's. This is Dickens snarling with rage at a society that deprives children of humanity, condemning them to the life of an animal, looking the other way in complete disregard for the moral principle that is respect and care. For when this deadly mix of indifference involves children, the result is total, irremediable abjection. Not that adults and old people are any less affected, but where children are concerned Dickens raises the tone of the denunciation as he lifts the veil on the dark side of society. However, rather than address the social, political, historical and cultural issues that are largely responsible for the dramatic situations he bears witness to, Dickens rather invites his readers to see the human story behind these children and how they reflect upon human relations and the very basis of social intercourse. As many critics have underlined⁵², Dickens' invective is fired by wrath. He has little faith in social progress and even less in the powers that be and their ability to improve the state of things. His protest is directed at individuals and at his readers rather than at the wheels that govern society.

Dickens describes the tears shed by his wretched characters, the way they crumple their ragged caps, capturing the individual, the here-and-now. This then leads him to launch into a crescendo of invective and indignation, his

⁵¹ *Ibid.*, pp. 256-258.

⁵² P. Gay, *Savage Reprisals. Bleak House, Madame Bovary, Buddenbrooks* (2002), trad. it. *Nello specchio del romanzo, Dickens, Flaubert, Mann*, Roma, Carocci, 2004.

rhetorical impetus leaving a lasting impression. But it is his portraits and scenes that prevail. Readers can recite a rosary of Dickensian descriptions of the infernal city, cramped rooms, carriages that get stuck in muddy ruts, reeling drunks, shadowy nights where escaped convicts lurk or, in contrast, the drawing rooms of bored ladies, lawyers offices or trysts at dusk. Although some are more credible than others, they are all part of the vast human tapestry of Misery and Nobility that weaves in and out of the Dickensian narrative.

Dickens' cipher is not street realism, however. He subscribes more to the order of the symbolic, outstripping reality, re-elaborating and even exaggerating it, taking the here-and-now to a transfigured elsewhere that meshes reality and the imaginary, reality and the visionary at the service of metaphor.

In Dickens' murky, grey-black metaphorical world, children and youngsters experience every type of excess: hunger, cold, duty, misfortune, unhappiness, malevolence, kindness, and generosity. The nameless, speechless baby monster is at the outer reaches of the extreme, as is the illiterate Jo. Many other children suffer equally drastic fates, grabbed by the collar by an escaped convict (Pip), whipped by a wicked stepfather (David), prisoner to a seductive thief (Oliver) and generally ill treated at the hands of violent, inept adults. They are all children whose lot in life from their very first years will be chores and neglect. There are rare exceptions of affection shown, like the tenderness extended to an enormous neonate called «a large baby», entrusted to the weak arms of a little brother. Even here, however, parental affection is granted only in return for something in return. But usually no affection is ever shown children. When a child dies, however, all reserve is lost and feelings and affection flood over.

Children are the victims of obsession, persecution, oppression, fear, terror, arrogance and blackmail and result in traumatized, distorted emotional and material lives. Dickens' child characters play out their roles in a world of darkness where human evil waits to pounce. Dickensian children are emblems of severe childhood developmental trauma⁵³.

Some, however, are metaphorical examples of children's resilience in the face of oppression and their ability to rise above the darkness.

While many traits of his child characters have their roots in the iniquitous social conditions of his own Victorian age, Dickens did not, however, model his children exclusively on what he saw around him. As Nabokov⁵⁴ points out in his introduction to *Bleak House*, Dickens not only has in mind the condition of children during his own time but was also keenly aware that young people had suffered ill treatment from the very beginning of the industrial age, well before

⁵³ L. Shengold, *Soul Murder. The effects of childhood abuse and deprivation* (1989), New York, Fawcett Columbine, 1991; D. Winnicott, *Sviluppo affettivo e ambiente* (1965), Roma, Armando, 1970; Id., *Gioco e realtà* (1971), Roma, Armando, 1983; D. Winnicott (1949), *Dalla pediatria alla psicoanalisi*, Firenze, Martelli, 1975; J. Bolwby, *Attaccamento e perdita* (1969-1980), 3 vols., Torino, Bollati Boringhieri, 1983.

⁵⁴ Nabokov, *Lezioni di letteratura*, cit., p. 101.

the period in which Dickens lived and set his novels. There is also a resonance, continues Nabokov, with the literary treatment of poor children by Jane Austen in *Mansfield Park*, and with the sentimental literature straddling the 18th and 19th centuries.

While it is no doubt true that Dickens' work taps the Imaginary he inherited of the disinherited child, the author's direct experience with the terrible conditions rampant during his own era is equally important. Peter Gay⁵⁵ gives an account of Dickens' interest the Tooting orphanage in 1849 where a few years, earlier 150 children had died of cholera in dirty stinking rooms. Neglect, malnutrition, physical punishment and lack of medical care had hastened the spread of the epidemic. Gay notes how Dickens wrote in his review, *Household Words*, that the children were «half dead from hunger and half asphyxiated»⁵⁶, and denounced the justice authorities for letting such a crime against children go unpunished.

The Tooting orphanage is easily recognizable in the intolerable conditions of the sinister facility where Oliver together with numerous other characters lived his first years.

The mix of real-life circumstances, the personal scars of the author himself and an idealized vision of childhood, all combine to create these inimitable portraits of neglect and indigence that in turn are an essential pillar of his *ars poetica*. As already indicated, Dickens' vision of childhood stands on a metaphorical plane. His portraits become symbolic, and so all the more emblematic of a reality of which he had first hand knowledge. It is a vision in which childhood figures are enveloped in a world of darkness. Moreover Dickens' children themselves acknowledge the imponderable nightmare that envelops them. They know they must endure, and if lucky, will learn from it. For Dickens, children represent an inestimable core of truth.

Children are confined to a nightmare dimension, an all enveloping, 'abnormal' state of solitude, as Manganelli describes it in his comments on the initial scenes of *Great Expectations* in which the boy Pip finds himself in the boundless terror of the marshes.

Terror is the framing structure. There is only one point of view, one standpoint from which every image appears imbued with hostile, fraudulent omnipotence. That viewpoint is the child's. Dickensian childhood is a place inhabited by objects of enormous proportions; a threatening, unfathomable space surrounds every child. Their defence is desperate and frail – hence the author's intrusions with biting humour. Every gesture is enigmatic, exasperated and fatal. The world is boundless; there is no place of refuge; one's mother is forever dead; walls show signs of crumbling and the mists throw up vaguely outlined faces full of evil⁵⁷.

⁵⁵ Gay, *Nello specchio del romanzo*, cit., p. 48.

⁵⁶ C. Dickens, *The verdict for Drouet*, in *Household Words*, 21 April 1849, in *The Works of Charles Dickens*, XIII, p. 93 (cit. in Gay, *Nello specchio del romanzo*, cit.).

⁵⁷ Manganelli, *La letteratura come menzogna*, cit., p. 70 (note: my own translation).

This nightmare dimension endured by children is one of extremes, a world of evil intensely depicted. Dickens' view has raised several urgent questions from the education science standpoint, leading some scholars to posit a so-called Black Pedagogy⁵⁸, whereby the Dickensian dimension of childhood exhibits the inexorable capacity for negativity and evil that inhabits the world; the mysterious condition that is childhood finds itself in a world of negativity that is other than self, a world seeped in evil.

Children are unknown and displaced, out of place and invisible, as indeed traumatized children often are.

Dickens, however, allows children a second birth in literature. He gives them back their visibility, restores the sense of self they have been deprived.

Nabokov defines Dickens' children as «little helpers»⁵⁹, a term reminiscent of the magical helpers in fairy stories. As well as serving to progress the narrative, these ethereal creatures often assume adult responsibilities, standing in for adults. Nabokov's diagram of the narrative structure of *Bleak House*⁶⁰ shows Jo as playing a viatic role, creating a connection between the various characters and pushing along the story to its conclusion. Yet the conclusion that awaits Jo is death from smallpox. It is a crucial passage in the novel's development and a key opportunity for the author to inveigh against the insensitivity and inhumanity of every form of authority and established power. Jo dies ignorant and unaware, the only witnesses of his passing a few compassionate friends. He leaves this world as he lived it, knowing nothing, being nothing and having nothing. Jo becomes the emblem of nothingness. At which Dickens explodes:

The light is come upon the dark benighted way. Dead! Dead, your Majesty. Dead, my lords and gentlemen. Dead, Right Reverends and Wrong Reverends of every order. Dead, men and women, born with Heavenly compassion in your hearts. And dying thus around us, every day⁶¹.

The Black Lady that carries off babies and children roams especially in the neighbourhoods of darkness where evil waits to pounce at every turn, suffocating even a sense of bereavement because there is no one there to mourn.

Jo's is not the death of Gavroche in Victor Hugo's *Les Misérables*⁶². Gavroche dies on the barricades; his role is as unforgettable as it is fundamental, lifting him

⁵⁸ I. Filograsso, *Bambini in trappola, Pedagogia nera e letteratura per l'infanzia*, Milano, Franco Angeli, 2012; A. Miller, *Il bambino inascoltato*, Torino, Bollati Boringhieri, 1993; Id., *Il dramma del bambino dotato*, Torino, Bollati Boringhieri, 1991; Id., *La fiducia tradita*, Milano, Garzanti, 1991; F. Cambi, S. Ulivieri, *Infanzia e violenza: forme, terapie, interpretazioni*, Firenze, La Nuova Italia, 1990.

⁵⁹ Nabokov, *Lezioni di letteratura*, cit., p. 106.

⁶⁰ *Ibid.*

⁶¹ Dickens, *Bleak House*, cit., p. 734.

⁶² V. Hugo, *I Miserabili*, Torino, Einaudi, 2006.

from anonymity to figurehead. He becomes a symbol that even characterizes his prior existence, depicted as of someone that will one day accomplish a heroic and sacrificial act.

In contrast, death of little ones in Dickens returns them to invisibility and the same nothingness that was theirs in life. Deprived of existence when living, they return to oblivion. Unless of course a reporter registers their disappearance and broadcasts what he sees. These chronicles form some of the most impactful, unforgettable chapters in literature, so emotionally charged as to be criticized as excessively rhetorical. Yet this caregiver author accepts no restraint in his despairing astonishment and boiling anger before the iniquitous fate of children. Using a series of different symbols, Dickens gives premature death an aura of death announced; the pain of loss evokes the angelic nature of child sacrifice, just as Jo is a sacrificial victim to the dead hand of injustice and social inequality. Like so many of his kind, he does not die but is killed by abandonment, 'orphanhood' and indescribable poverty rather than by a disease. Nell, the fairy like child departs from this world after accomplishing her role as a guiding spirit. So too, Dombey's young son.

In his preface to *The Old Curiosity Shop*, Giorgio Manganelli considers the fate of this generous, diligent and gifted student, the favourite of his old teacher. Although a minor character, Dombey's son has a role in the narrative in the final stages of his life, in characteristic Dickensian style. Here too, Dickens couples childhood with circumstances of extreme.

The extreme nature of death creates a link between old people and children, both vulnerable, marginalized creatures. In this case, Manganelli notes, it is the child who guides the old man. Both are 'close to death': the old man on account of his age, the young boy from disease. Yet the youth is destined to perpetuate the illusion of eternal youth:

[...] this ephemeral young man has an imposing destiny, an obsessive concentrated task to fulfil, an awareness of the path before him. For this dying youth shows the living the way; this youth, or rather this child guides the adult. By the same token, the relationship is not between son and father but between grandchild and grandparent. It is a completely gratuitous relationship between two totally different human beings, similar only in their closeness to death⁶³.

As Manganelli points out, those who die in old age:

[...] do not know death as a grace bestowed; they have known the suffering of living, not the sacred suffering of innocence, the pain of being blessed. The dying child is an exquisitely indistinct, bodiless being, an ephemeral salt, a frail thin seal, a lone sign on windswept sand; a sign that only has sense, however, if it has not passed through the toil of a long life⁶⁴.

⁶³ G. Manganelli, *Introduzione a C. Dickens, La bottega dell'antiquario*, Milano, Rizzoli, 1959, pp. 13-14 (note: my translation).

⁶⁴ *Ibid.* (note: my translation).

The utopia of eternal youth and the idealized purity of children demand the ultimate sacrifice of those on the very threshold of life. Departure from the human world into the abyss triggers heart-breaking melancholy that perpetuates the illusion of innocence. These objects of our grief, detailed for the extreme sacrifice, are therefore the Chosen. As icons of the divine sacrificial child, they are the first to leave the land of evil, safeguarding for those who remain the illusion and dream that the young can find salvation and continue to exist, unsullied, in the dimensional of the ideal and the divine. And it is almost as if they have been relieved of their suffering.

Dickens' work is also crowded with many old people: harsh, rarely kind, shrewd and diabolic. Some, like Scrooge, himself an abandoned child, redeem themselves. Other ambiguous characters, like Fagin, beseech compassion when they are about to mount the gallows and indeed prompt a certain affection for having looking after his group of scarred children distorted in body and made savage by deprivation. For Dickens' children hunger for any kind of affection, and as such they are destined to sacrifice. David Copperfield, Dickens' favourite literary son, whose coming-of-age story is that of the author himself, has to contend with many senile figures: aunts, mad creatures, friend and foe, all playing a role in his path to adulthood. Pip, too, will discover his old benefactor in his *Bildung*. The list could go on. As Manganelli notes, however, there are no parents. There is a generation missing in the lives of these children without a history, orphans of unknown origin, beggars and pilgrims. For as the ultimate representation of unknown origins, the orphan is also the beginning of a new cycle⁶⁵. The quest for and the discovery of one's origins restore identity and is the underlying theme of many of Dickens' child portraits.

4. *Pain suppressed: girls and understatement*

The dark world inhabited by Dickens' characters is especially nuanced if this meta-world is inhabited by girl children. Whether living in slums or comfortable houses, girls are described from inside. We understand why their existence is a question of endurance.

With few exceptions, Dickens girl characters are dignified creatures even in poverty. Set to the most humiliating and backbreaking tasks if poor, or accomplishing charitable deeds if well off, all are forced to abide by rigid rules. Dickensian girl children inhabit the dark side whether they live in squalor or well-appointed drawing rooms. Their suffering is always, however, interior,

⁶⁵ Cfr. F. Jesi, *Letteratura e mito*, Torino, Einaudi, 2002; A. Faeti, *Le figure del mito*, Cesena, Il Ponte Vecchio, 2001; C.G. Jung, K. Kerényi, *Prolegomeni allo studio scientifico della mitologia*, Torino, Bollati Boringhieri, 1941; J. Hillman, *Saggi sul Puer*, Milano, Raffaello Cortina, 1972.

which is never voiced unless by the author who describes to the reader their deepest thoughts. Although, or perhaps because suppressed, their pain is all the more vibrant. It is different from the pain suffered by boys. Following anthropological and cultural models, Dickens treats his girl characters with a certain modesty; their pain is cloaked, as they themselves are hidden from view by shawls as they go about their tasks. If they have been caught up in abjection in body and mind, it is because they are exemplary victims of the monstrosity of diabolic adults, like Judy, branded as an animal like the monster child.

Nor do they usually cry out in pain even in childbirth. They may also make the extreme sacrifice, as in the case of Oliver's young prostitute friend. Does Dickens overdo pathos? Hiding pain is part of the story of women and girls, as Esther, Agnes, Amy Dorrit and Nell demonstrate. Dickens' girl characters are surprisingly strong in the intensity of their interior dialogue and for the tenacity with which, at least in the above three cases, they face their youth. Each an orphan of at least one parent, their childhood is melancholic, marked by deprivation that manifests as solitude and the early burden of responsibilities. Dangerous initiations are forced upon them. They are exiled to the outer reaches of society. Amy Dorrit, the prime example of this is born in prison, branded from the outset with the mark of infamy of the nightmarish world of abjection and debt. But she herself is never abject. Little Dorrit has the stuff of sacrifice (Dickens talks of inspiration!) that lifts her to the rank of a figure of salvation. In this «darkest of Dickens' novels»⁶⁶ she finds the strength not to succumb to the most constraining metaphor the author ever invented: perpetual imprisonment. The child moves from one hell to another, from prison to the city of shadows, worlds of darkness that, however, do not pull her under. Giving no idea of her age because she is so small, Little Dorrit recalls Nodier's Crumb Fairies. As well as a child of poverty not given time to grow up, she also has a fairylike aura.

Amy Dorrit is a figure of piety of sentiment and understatement, a viatic figure hovering in the timeless world of the prison, she strikes out into the labyrinth of the city, all alone.

Another girl character swept along in time and space is Nell. Her voyage is from the antique shop, a place of a regimented past, to a land of horrors suspended in an unreal other world. Nell encounters monsters, figures of terror, and abomination on a pilgrimage where the grotesque is always present. She remains unscathed because she is unreal. This world at the edge is also her kingdom, so much so that the end of her journey will be death.

Esther Summerson, the heroine of *Bleak House*, lives with a wicked stepmother, in the shape of her aunt. She has no knowledge of her birth and has to bear the heavy burden of the ultimate shame, as her aunt reminds with each birthday: «Your mother, Esther, is your disgrace, and you were hers»⁶⁷.

⁶⁶ Pagetti, *Introduzione a La piccola Dorrit*, cit., p. XIV.

⁶⁷ Dickens, *Bleak House*, cit., p. 30.

She swallows her shame and pain, forging her character by carrying out myriad duties to attenuate her guilt. Forbearance, patience, the quest for perfection and selflessness are the defence Esther puts up. She strives to be worthy of this world, repeating to herself that she is neither good nor beautiful and should be thankful for what she has. Her strength comes directly from the dark world she harbours in her breast, which she feeds with her own negation of self. She is the epitome of understatement, keen observation of the world, dedication and silence. She wastes nothing. She learns and builds her wisdom. Her only *confidente* is her doll to which she says: «I can remember, when we were alone together, now, Dolly, I am not clever, you know very well, and you must be patient with me, like a dear!»⁶⁸.

Like Cosette of *Les Misérable* and *Vassilissa La bella*, one of the sublime tales of Alexander Afanasie'v, the doll is a mother substitute for Esther too. In fairy stories, dolls often represent the dead mother's love and are a source of consolation, a *confidente* with magic powers. Esther's doll is the only recipient of her feelings. In fact when she leaves her solitary childhood she will bury it in the garden like a coffer containing secret treasures. The doll is Esther's only friend, the only thing she feels at ease with. Her devastated self-esteem prevents her from social contacts. Esther remains a fairy-tale figure even as a young woman. She tells fairy stories to desperate children, will contract smallpox and be defaced. She is the symbol of the young outcast girl, her defacement taking on the symbolism of a rite of initiation, a frequent motif of the fairy story. Like other fairy story characters, Esther will reacquire her former appearance (in a way Dickens fails to explain). It is the outward sign of a remarkable psychological change. However, Esther, the unloved orphan, even if not poor and ignorant, remains a very controversial Dickensian heroine, charged with excessive passivity before the events that befall her. But this is her chosen path. As Harold Bloom points out, Esther's impassiveness is what allows her to build her 'formidable' conscience. If we experienced a simile trauma to Esther's, we too, says Bloom, would identify with her, and like her 'remember in advance', reliving the trauma and pathos that ensue. Esther's state of 'orphanhood' is a universal condition that we all sooner or later will know. Esther's kindness, Bloom continues, springs directly from her experience and as a survivor. It is also her self-defence. Esther's self-effacing modesty and low opinion of herself is her way of atoning for the guilt of being an illegitimate child. It is her way of gaining acceptance in the world, for as child and woman, she acknowledges her personal drama and knows there is no pardon in this world.

Agnes Wickfield is Esther's fellow traveller, the silent companion of Copperfield and his second wife. Agnes too is burdened with a tragic birth: her mother dies in childbirth and Agnes is convinced she has killed her. She lives with shame and guilt for a crime she has not committed. Like Esther, she

⁶⁸ *Ibid.*, p. 27.

seems detached from herself, remaining always in the shadow, serving others, underestimating herself, suppressing her own feelings, that we learn about only through the author. Her secret is cloistered in her resigned sorrow and, as Peter Gay⁶⁹ points out, her dedication and kindness are her defence against her deepest fear that she is terribly evil.

The suppressed pain of these young girls who, despite their straitened circumstances are well educated, well dressed and well groomed, is another expression of the dark side of Dickens. This is especially the fate of girl characters constrained by Victorian morals and governed by rigid rules, that when accompanied by trauma, and as in these cases, also by a sense of guilt, risks stunting and indeed killing the development of self-worth. Yet despite the backdrop of the cultural context of the second half of the 19th century, these young girls accede to their identity thanks to the tenacity with which they protect themselves using the only weapons they have. As Kafka, an avid reader of Dickens, would have said, for these heroines, the only sin is impatience⁷⁰. These little orphan girls enveloped in Dickensian darkness save themselves by inuring themselves to sorrow and suffering, and by cultivating resolve and abnegation, following what Dickens calls a sort of 'inspiration' as he describes Little Dorrit.

It is enough that she was inspired to be something which was not what the rest were, and to be that something, different and laborious, for the sake of the rest. Inspired? Yes⁷¹.

Although their hidden pain may not be put into words, it can at least be turned into something else, an inspiration, a vocation, a talent for 'good' that will be used to ward off the kingdom of evil and the darkness of the soul. Dickens dedicates long pages to this, showing the extent of the traumatic lived experience these young girls have to bear.

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⁶⁹ Gay, *Nello specchio del romanzo*, cit., p. 40.

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The Mystery of Edwin Drood (unfinished, 1870)

New insights into the history of child rearing within Russian and Soviet families (1890-1940)*

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ABSTRACT: This article aims to analyse if and how child rearing changed from the end of nineteenth century until 1930 in the Soviet Union, making use of pedagogical sources which have previously been overlooked. For this reason, the first part of this essay presents the debates on family education before the Revolution, devoting particular attention to V.V. Rozanov, P.F. Kapterev, N.A. Ostrogorskij and M.M. Rubinstein's works. The second part outlines the reform introduced by the October Revolution which inevitably led to the reshaping of urban family structures. The third part describes Anton S. Makarenko's (1888-1939) theories about the educational relationships developed in different family contexts and how to cope with family crisis during the Thirties. In this way it is possible to understand that Makarenko's works, one of the most famous founders of Soviet pedagogy, represent a rich and complex source for the analysis of child rearing in the Soviet Union of the 30s. Makarenko became famous for his *An Epic Education* (1933-1935), in which he described his educational theories about the rehabilitation of juvenile delinquents in the Ukraine. Nevertheless, in 1937, he wrote several works on the role of the family in the education of the 'new man', i.e. the Soviet citizen: his *Lecturers for parents*, originally broadcast on radio, and *A Book for Parents*, also known as *The Collective Family*.

EET/TEE KEYWORDS: Child Rearing; Family Education; Juvenile Delinquency; Principles of Education; Pedagogical Theory; Russia; Soviet Union; XX Century.

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New insights into the history of child rearing within Russian and Soviet families (1890-1940)

Thus far, two main lines of research have been followed regarding the history of the family in Russia and the Soviet Union. The first concerns the structure of the family in peasant households in Russia, principally ascribable to Peter Laslett and John Hajnal and in general to family anthropologists¹. The second focuses on the family as revolutionized by the Bolsheviks after the October Revolution of 1917, restored by Stalin in the Thirties, and which is followed by a host of social historians and demographers, mostly from the West². These researches have reconstructed the main transformations which concerned the family from the modern to the contemporary age: in European societies under the Ancien régime the family appeared as a fairly stable institution, central to the raising of children and care for the elderly – despite the diversity of family patterns found within the different geographical areas and social classes – while in contemporary societies, the family seems to have become somewhat instable and fragile as an institution because of the conflicts between the generations, the political and cultural changes which have occurred, and the economic crisis which forced different members to search for survival in different part of the world³.

In the wake of the so called «demographic transition» of the modern age⁴ and the demographic cataclysm which resulted from the First World War, the great Dictators strove to devise a family policy which interlaced and eventually merged with demographic and eugenic requirements on the one hand, and on the other, the attempt to control people's lives, starting within the private institution *par excellence*⁵. In the Soviet Union after the October Revolution, the regime

¹ P.Jr. Czap, 'Large family: the peasant's greatest wealth': serf households in Mishino, Russia, 1814-1858, in R. Wall, J. Robin, P. Laslett (edd.), *Family Forms in historic Europe*, Cambridge-New York-London, Cambridge University Press, 1983, pp. 105-151; H. Kolle, *Social Change in Nineteenth-century Russia: family development in a proto-industrial community*, Phd Dissertation, Bergen (Norwegen), 2006; G. Kera, G. Kessler (edd.), *Urban household and family in twentieth century East and South-East Europe*, in «History of the Family», (Special Issue), n. 13, 2008, pp. 119-125.

² B. Kerblay, *Familles socialistes*, in A. Burguière, C. Klapish-Zuber, M. Segalen, F. Zonabend (edd.), *Histoire de la famille*, Paris, Armand Colin, 1986, pp. 437-473; W. Berelowitch, *Modèles familiaux dans la Russie des années 1920*, in B. Kerblay (ed.), *L'évolution des modèles familiaux dans les pays de l'Est européen en U.R.S.S.*, Paris, Institut d'Études Slaves, 1988, pp. 26-40; A. Blum, *Socialist Families?*, in D.I. Kertzer, M. Barbagli (edd.), *History of the European Family. 3. Family life in the twentieth century*, New Haven and London, Yale University Press, 2003, pp. 198-237.

³ L. Fontaine, J. Schlumbohm (edd.), *Household Strategies for Survival 1600-2000: Fission, Faction and Cooperation*, «International Review of Social History», n. 45, 2000, pp. 1-17.

⁴ P.P. Viazzo, *Mortality, fertility, and Family*, in D.I. Kertzer, M. Barbagli (edd.), *History of the European Family. 1. Family life in early modern times, 1500-1789*, New Haven and London, Yale University Press, 2003, pp. 157-187.

⁵ P. Ginzborg, *The family Politics of the Great Dictators*, in Kertzer, Barbagli (edd.), cit., pp.

also concentrated on shaping the socialist family in name of the communist ideology which proclaimed new social relations between men and women, the latter having been subjugated for centuries⁶, without taking into consideration the enormous heterogeneity of family patterns over the vast geographical space and ignoring, more or less consciously, the fact that the family model being proposed seemed to be more appropriate to the urban population than to the majority rural one.

The aim of these family reforms was therefore to control the family and its private life from different points of view – the biological, the legislative and the educational. However, if we take into account sources of a pedagogical nature, which have often been neglected⁷, it is possible to analyse if and how family relations changed during the marked evolution that the family went through from the end of Nineteenth century until 1930 and which compelled individuals to hide their private lives in the years of the Great Terror⁸.

The change in the function that the State attributed to the family can only be appreciated fully if one analyses the debate on the role of the family and education at the beginning of the 20th century. This has largely been omitted by scholars who have focused their work mainly on the political debate and juridical reform in the revolutionary context. In the inter-war period, the Soviet family reform can be split into two distinct phases, because the family was subjected to two different forms of control by the regime. As David L. Hoffmann argues, in the first phase, after the October Revolution, Soviet policy was arguably the most modern in the world because the Bolsheviks condemned the traditional family to extinction in order to emancipate women and to educate children in the ways of communism, with no fear of the demographical decline being experienced in other European countries, while in the second phase, during the Thirties, Stalin rehabilitated the family in order to put it at the service of the State, drastically reducing its autonomy⁹.

In the light of these observations, the first part of this essay presents the debate on the pedagogical role of the family conducted during the final decades of the tsarist monarchy. Pedagogues and philosophers agreed that it was necessary to address the family crisis, pedagogues proposing divorce, philosophers instead putting forward the notion of the happy family through the improvement in women's status, which emerged within socialist discourse.

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⁶ B. Kerblay, *Familles socialistes*, in Burguière, Klapish-Zuber, Segalen, Zonabend (edd.), *Histoire de la famille*, cit., pp. 437-473.

⁷ Roberto Sani has stressed this neglect in the specific context of Italian history of education, see R. Sani, *Le fonti e i percorsi della ricerca nei settori della storia della famiglia e dell'infanzia*, «Pedagogia e vita», n. 4, 1997, pp. 107-126.

⁸ V. Garros, N. Korenevskaya, T. Lahusen (edd.), *Intimacy and terror: Soviet diaries of the 1930s* [transl. by C.A. Flath], New York, New Press, 1995, pp. XI-XVIII.

⁹ D.L. Hoffmann, *Stalinist values. The cultural norms of soviet modernity (1917-1941)*, Ithaca and London, Cornell University Press, 2003, pp. 88-117.

The second part describes the legislative reforms of 1918, 1927 and 1936 with the inevitable changes related to marriage, divorce and acknowledgment of illegitimate children, doing so in the more general context of Bolshevik social policy. This considerably diminished the family's fundamental role in child rearing, which began to be found instead within state education. The third and final part analyses the conceptions of the main Soviet pedagogue Anton S. Makarenko (1888-1939), well known to scholars of educational sciences for his work *An Epic Education* (also known as *Road to Life*)¹⁰, published in 1933-1935, in which he described the re-education of orphans and deviant children in two colonies based on collective work which he directed in Ukraine during the Twenties. From the middle of the Thirties, Makarenko dedicated himself to writing: *A Book for parents*, written with his wife Galina Stachievna Makarenko during 1936-1937, and *Lecturers for Parents* (1937) originally broadcast on radio were both these works in which he rediscovered the educational function of the family in communist society¹¹. Both works, dedicated to the educational responsibility of parents, propose an educational model for the shaping of the communist citizen, replacing the school in this task, which was historically charged to the shape a national and collective identity through education¹².

1. *The crisis within the Russian family between the Eighteenth and Nineteenth Centuries*

From the end of the Nineteenth century until the first decade of the Twentieth century, philosophers and pedagogues devoted themselves to a very intense debate on the crisis inside the family, on the educational role of the parents and on the future of this sacred institution which the Romanov monarchy venerated as one of the most inviolable values¹³.

The crisis of the Russian family stemmed from a number of different factors, amongst which we can undoubtedly mention the erosion of the patriarchal model based on patrilineage¹⁴, caused by the radical transformations which

¹⁰ A.S. Makarenko, *Pedagogicheskaja Poema*, Moscow, Chudozhestvennaja Literatura, 1987.

¹¹ A.S. Makarenko, *Kniga dlja roditel'ev*, Moscow, Khudozhestvennaja literatura, 1937; A.S. Makarenko, *Lekcii o vospitanii detej*, ed. by G.S. Makarenko, V.N. Kolbanovskogo, Moscow, Uchpedgiz, 1950 (3rd ed.); A.S. Makarenko, *A book for parents* (Written in co-operation with Galina Stachievna Makarenko), Transl. by Robert Daglish], Moscow, Foreign Languages Pub. House, 1954; D. Caroli, *Cittadini e patrioti. Educazione, letteratura per l'infanzia e costruzione dell'identità nazionale nella Russia Sovietica*, Macerata, eum, 2011, pp. 209-231.

¹² Caroli, *Cittadini e patrioti*, cit., pp. 173-176.

¹³ Worthman, *The Russian Empress as Mother*, in Ransel (ed.), *The Family in Imperial Russia*, cit., pp. 60-74.

¹⁴ According to M. Mitterauer and A. Kagan, «in Central Russia the strictly patrilineal family structure was probably preserved in spite of, but not because of the manorial influence.

took place after the abolition of serfdom in 1861¹⁵, and the transformation of the peasant household as a result of the urbanisation process: «According to estimates for the 1890s, more than two million peasants annually participated in seasonal labour migration in the Central Industrial Region, and about six million in the whole of European Russia, which amounted to about a third of the male population»¹⁶.

The crisis also had a cultural cause: the incapacity of parents to devise new educational models for the new generation since the existing ones that they had learned from their own parents, based on submission and obeisance, were old-fashioned¹⁷ and inappropriate to modern conceptions of child development, and to other factors which seemed resolvable only by a revolution in both laws and customs, i.e. the end of love between spouses and the submission of family members to the authority of the *pater familias*¹⁸.

Generally, the condition of the woman was characterised by submission and obeisance and only death, whether her own or that of her husband (as featured in much Russian literature) could put a end to her unhappiness. As Laura Engelstein argues

Imperial Russian law established a system of power within the family at least as autocratic as the one governing the operation of the state: the husband wielded absolute authority over the wife, and the father entirely dominated the children. Women could not leave their

These manorial influences on the family conditions of the serfs were indeed very strong. Manorial instructions dealt with question about marriage age and remarriage. Family divisions needed the approval of the lord of the manor. Individual family members could be transferred by him. In spite of such interventions, however, the rural population was able to preserve the traditional form of coresidence in patrilineal households», see M. Mitterauer, A. Kagan, *Russian and central European Family Structures: A comparative view*, «Journal of Family History», vol. 7, n. 1, 1982, pp. 103-131 (p. 128).

¹⁵ This kind of relation within the rural family of peasants or agricultural serfs has been confirmed by Peter Jr. Czap for Mishino region and constitutes a model for the other rural regions of Russia, see P. Jr. Czap, *Marriage and the Peasant Joint Family in the Era of the Serfdom*, in D. Ransel (ed.), *The family in imperial Russia: new lines of historical research*, Urbana, IL., University of Illinois Press, 1978, pp. 103-123 (p. 146).

¹⁶ T. Valetov, *Migration and the household: Urban living arrangements in late 19th- to early 20th-century Russia*, «The History of the Family», n. 13, 2008, pp. 163-177; Czap, *Marriage and the Peasant Joint Family in the Era of the Serfdom*, cit., pp. 103-123; See also H. Kolle, *Labour relations in a 'dual economy': agrosystem and proto-industrialisation in post-emancipation Central Russia*, in E. Landsteiner, E. Langthaler (edd.), *Agrosystems and labour relations in European rural societies*, Turnhout, Brepols, 2010, pp. 75-95.

¹⁷ N.L. Pushkareva, *Mat' i ditja v ruskoj sem'e XVIII-nachala XIX veka*, «Social'naja Istorija. Ezhegodnik 1997», Moscow, Rosspen, 1998, pp. 226-246 (see p. 245); O.A. Kis', *Materinstvo i detstvo v ukrainskoj tradicii: dekonstrukcija mifa*, «Social'naja Istorija. Ezhegodnik 2003 (Zhenskaja i gendernaja istorija)», Moscow, Rosspen, 2003, pp. 156-172.

¹⁸ The end of the marriage was very rare and should be authorised by the Holy Sinod, see D. Caroli, *La justice pénale des ecclésiastiques en Russie (XVII–XVIII siècles)*, in B. Durand, M. Lesné-Ferret (edd.), *Justice pénale et droit des clercs en Europe, XVIIe–XVIIIe siècles*, Lille, Histoire de la justice, 2005, pp. 113-132.

households or undertake paid employment without the formal permission of the father or husband, who controlled their to the necessary official papers. No law protected women against physical abuse short of severe bodily injury. No formal grounds existed for legal separation; divorce, for which adultery constituted one of the few legitimated reasons, could be obtained only after elaborate and humiliating (or duplicitous) procedures; annulment was a rare and arduous attainment. No one of any age, male or female, could marry without the permission of parents or other appropriate authorities. By ancient custom, women had the legal right to maintain they own property after marriage, but they suffered several disadvantages when it came to inheriting family wealth¹⁹.

This kind of family and family relations were destined to change with the evolution of the multifocal family complex which was also multigenerational, given the early age of marriage and the proportion of people who reached the age of 60 (6%)²⁰, but mostly in relation to the agrarian reforms introduced after the abolition of serfdom (1861) and by the Stolypin land reform (1906). Indeed Robert E. Johnson and Diane Koenker demonstrated the evolution of the family structure through a study of the migration toward the industrial cities, and revealed the progressive transformation of the traditional peasant household which forced the men to emigrate to the cities and to leave their family in the countryside²¹.

In this sense, Timur Valetov also argues that «The urban workforce of European Russia consisted, for the large majority, of peasant labour migrants who were either wage-earning members of households split between village and town or had only recently and incompletely separated from this parental household»²². Naturally these kinship bonds which were tied up with the need to hold onto land for times when work was scarce must have resulted in the evolution of women's roles in the countryside and also for those who ventured in the city for work²³. Although socialists tended to interpret most of these changes from the point of view of female emancipation and from more or less feminist positions, it was true that family relations changed not only between spouses but also between parents and children. August Bebel's work *The woman and the socialism* (1883) had a particular resonance. The German socialist, despite celebrating the emancipation of women from the family as a

¹⁹ L. Engelstein, *The Keys to Happiness. Sex and the Search for Modernity in Fin-de-Siècle Russia*, Ithaca and London, Cornell University Press, 1992, pp. 31-41; E. Naiman, *Sex in Public, The incarnation of Early Soviet Ideology*, Princeton, NJ., Princeton University Press, 1997, p. 32.

²⁰ Mitteraurer, Kagan, *Russian and Central European Family structures: a comparative view*, cit., p. 120.

²¹ R.E. Johnson, *Family relations and the rural-Urban Nexus: Pattern in the Hinterland of Moscow, 1880-1900*, and D. Koenker, *Urban Families, Working class Youth Groups, and the 1917 Revolution in Moscow*, in Ransel (ed.), *The family in imperial Russia: new lines of historical research*, cit., pp. 263-279 and pp. 280-304.

²² Valetov, *Migration and the household: Urban living arrangements in late 19th- to early 20th-century Russia*, cit., p. 167.

²³ *Ibid.*, pp. 169-170.

result of divorce, stopped short of delegating child rearing to the State arguing that: Parental tenderness cannot be replaced by group feeling; a child must remain at the mother's breast as long as necessary for his or her emotional well-being; only the parents should decide when *and if* their child is to be entrusted to public care»²⁴.

In the context of this debate, paradoxically the most conservative positions which favoured the reform of the Family Code found themselves to have something in common with the socialists who proposed a family founded on true love without the constrictions of wedlock which could transform cohabitation into a hateful imprisonment. Amongst the philosophers and pedagogues engaged in this debate, there were the well-known philosopher Vasilii V. Rozanov (1856-1919), one of the most famous Russian pedagogues Petr F. Kapterev (1849-1922) and the psychologist and philosopher of education M.M. Rubinshtein, as well as some others who assumed positions worth analysing in order to understand the conceptions of the role of family in the education of children and, in general, on the future generation. This debate also makes it possible to go beyond some commonplaces regarding the Russian and Soviet family.

The famous philosopher Vasilij Rozanov was amongst those who described the family crisis as a kingdom of hostile family relations as a result of his personal experience. Indeed, the interdiction of divorce left him scarred, as Laura Engelstein argues: «Rozanov was unable to obtain a divorce or to marry the woman he eventually considered his true wife, with whom he lived in unsanctified union and fathered four (illegitimate) children»²⁵. Of his writings, some notable articles dealt with the family and the need for legislative intervention in order to correct or avoid situations of great unhappiness within the family unit. In one article he insisted on the family as the first school, i.e. on the educational role of the family in the assimilation of religious and cultural values which school was not able to teach. He also argued that even if the family was depraved «there was nevertheless a little bit of love there»²⁶.

Rozanov also dedicated a work to the family, entitled *The question of the family in Russia. Parents and children. Husbands and wives. Divorce and the concept of illegitimacy. The life of bachelors and prostitution. Women's labour. Law and religion* (1903) in which he brought together several articles about the educational value of the chaste family and underlined instead how negative was the family based on a loveless marriage. In one of his articles, after having described the strange behaviour of a swan forced to live with other females after the death of his beloved, he ascertained that «it seems to me that

²⁴ R. Stites, *The Women's Liberation Movement in Russia. Feminism, Nihilism, and Bolshevism 1860-1930*, Princeton, NJ., Princeton University Press, 1978, pp. 233-258 (see. p. 267).

²⁵ Engelstein, *The Keys to Happiness*, cit., pp. 32-33; Naiman, *Sex in Public, The incarnation of Early Soviet Ideology*, cit., p. 33.

²⁶ V.V. Rozanov, *Sem'ja, kak' istinnaja shkola*, in V.V. Rozanov', *Sumerki prosveshchenija. Sbornik statej po voprosam obrazovanija*, Izd. P. Percova, Spb, 1899, pp. 205-213.

bringing forth a pure family to this Earth – means to build paradise there; if you allow ‘swords and division’ in only one family, you will bring chaos to the whole Earth chaos, you will pour blood and mud into it»²⁷. In another article, *The decadence of the family*, he provided a very negative description of the peasant family characterised by «a feeling almost animal in nature, less worthy than pedagogical, artistic and philanthropical and other feelings»²⁸. Finally he stated that a family is unhappy when it becomes for the children the «cradle of their education, a family that is indifferent or hostile or amoral or corrupted». Konovalov’s murder, which resulted in the first acquittal of his wife who had suffocated her husband because he had requisitioned her passport and all her material goods, was in fact a stark reminder of the fact that legal intervention was necessary to protect the family²⁹.

Defender of the patriarchal system and hostile to the secularization of marriage, Rozanov denounced as unfair the system in force at the time, echoing the liberal criticisms of the patriarchal system, and was paradoxically of a same mind as those, including the socialists, who saw divorce as the solution when the love between spouses ended. It should be noticed that the project for reform regarding separation was only approved by the Synod in 1910 (the law of 1914 consisted only of amendments to the civil statute)³⁰ and came into force after the October Revolution.

The pedagogues and philosophers of education of the end of the Nineteenth century and beginning of the Twentieth century were not so obsessed with the end of marriage because they were interested in the child rearing, offering models which reflected both the political stance on the role of the woman in society and scientific conceptions of education. P.F. Kapterev was one of the most famous pre-Revolution pedagogues. In an article entitled *The task and the principles of family education* (1898), under the influence of the American conception of the psychology of child development known as paedology, he declared that with the help of anthropology the earliest child rearing should create the necessary conditions for his global and general development. The responsibility for education should be entrusted to the parents both of whom should be prepared for the role even if the mother was expected to play the greater role. Indeed «child rearing should eschew all artificiality, it should be an *organic* activity bringing together all the peculiar characteristics of children’s educational ages, and based on the human sciences. Furthermore education

²⁷ V.V. Rozanov, *O neporochnoj sem’e i eja glavnom uslovii* (1899) in V.V. Rozanov, *Semejnyj vopros’ v Rossii. Deti i roditeli. Muzh’ja i zheny. Razvod’ i ponjatie nezakonorozhdennosti. Cholostoj byt’ i prostitucija. Zhenskij trud’. Zakon’ i religija*, Spb, 1903, Vol. I, pp. 72-84 (see p. 74).

²⁸ V.V. Rozanov, *Upadok sem’i* (1900), *ibid.*, pp. 52-64 (p. 61).

²⁹ V.V. Rozanov, *Zakonodatel’naja pomosch’ sem’i* (1900), *ibid.*, pp. 1-12 (see p. 3).

³⁰ Engelstein, *The Keys to Happiness*, cit., p. 35.

should also be individual»³¹. The task of child rearing, which was to bear in mind the child's mental and physical capacities, was to educate the child for life in society because the social interests of the State were the «source of living activity, liveliness and personal norms». The child, indeed, should feel the need for friends of his own age, chosen freely, and should be brought up in contact with nature³².

The relations which emerged from this educational theory were based on scientific assumptions and not on the traditional educational models of submission and obeisance which, on the contrary, created artificial situations. In the same year, even if he did not refer to psycho-pedagogical conceptions, the pedagogue N.A. Ostrogorsky described child rearing as the «cement of the family» and that «in the eyes of children, the parents have to be equal, both kind, and each with their own character. The children should know that their parents live in harmony and that both are interested in their children, they love them and want them to do well»³³. Unlike other pedagogues, Ostrogorsky conceived different parental roles according to the children's gender, because «a normal family presents itself to us as a union in which, even given the personalities of its members, gives precedence to amicable relations, mutual support and help, the sharing of joy and pain, in other words a communal work aimed at making life better and easier. The children of the family are neither the most or least important members, but equal. But their arrival in the family is an event which brings about a new period of its life. If the childless couple has the right to seek their personal happiness in the measure that is accessible to them, then children bring to their life that element of altruism which restricts the frame of personal happiness, revealing other horizons. Children cause all sorts of worries, afflictions, sacrifices, but give great joy which many couples would not otherwise find»³⁴.

Ostrogorsky proposed a family model based «on love and the need for love, the recognition of the guiding hand and superiority of the parents over the child, and his rightful demands of them, and a certain pride», because of the fact that «children are the hope and happiness of the family. And let us repeat once more, they are neither the most nor the least important. They have rights and most of all the right to be children. Their mistakes must be punished hard but not heartlessly. Life flows through peace and friendship. Childhood is to be respected as is recognised the right of adults to return love with love, respect with respect»³⁵.

³¹ P.F. Kapterev, *Zadachi i osnovy semejnogo vospitaniya*, in *Enciklopedija semejnogo vospitaniya i obuchenija*, Saint Petersburg, E. Evdokimov, 1898, Vyp. I, p. 27.

³² *Ibid.*, pp. 29, 32.

³³ N.A. Ostrogorskij, *Semejnyja otnosheniya i ich' vospitatel'noe znachenie*, in *Enciklopedija semejnogo vospitaniya i obuchenija*, Saint Petersburg, E. Evdokimov, 1898, Vyp. II, pp. 25, 27.

³⁴ *Ibid.*, p. 54.

³⁵ *Ibid.*, p. 60.

Compared with this model of relations based on respect within the family, in 1906 P. Kogan tried to evacuate the criticisms addressed to the socialist conceptions of the family. These put forward the notion that childrearing should be connected with the whole social regime, and that the family itself should in fact disappear along with all private property. According to Kogan, socialism had already gone a step further than had the French philosopher Jean Jacques Rousseau (1712-1778), because he ascertained that education was not possible in a bourgeois society³⁶.

This position was undoubtedly too radical for Russia because during the Conference on child rearing held in Saint Petersburg (1912-1913), two main positions emerged, put forward by P.F. Kapterev and D. Galanin respectively. P.F. Kapterev continued to ascertain that each phase of a child's development presented its own peculiarities marked by hereditary factors, underlining that it was necessary to create an environment appropriate to the physical and moral development of the child, and that he should be guided towards autonomous activity and, ultimately, to develop his own personality. Without neglecting the nature of the child, family upbringing should not impose artificial authoritarian schemas which limited his universe, i.e. the unit of education as conceived by the Czech pedagogue Johann Amos Comenius (1592-1670)³⁷. Starting with the effects of living conditions on child rearing, D. Galanin proposed a model of the extended family (parents, children, relatives and servants) which should be based on the three principles of moral authority, economic dependence and spiritual bond i.e. the law of love which only the natural family (*rodnaja*) could give. Thank to these principles the most important element of the family relations was respect for the elderly even if there was no law to this effect. In this sense, in consideration of the dismantling of the family unit and the conquest of the freedom between the sexes, Galanin did not approve of the state education of children because it could not make them happy³⁸.

This model based on the three principles which combined «feelings and material interests»³⁹ was taken up again in 1915 by the philosopher of education M.M. Rubinstein. He argued that the crisis of the patriarchal family depended on the loss of its productive identity because work, being the concrete

³⁶ P. Kogan', *Sem'ja i vospitanie v obshchestve budushchago*, «Vestnik vospitaniya», n. 5, 1906, pp. 120-140.

³⁷ P.F. Kapterev, *Zadachi semejnago vospitaniya*, in *Trudy Pervago Vserossijskago S'ezda po semejnomu vospitaniju* (Peterburg 30/XII/1912 - 6/II/1913), Saint Petersburg, Tipo Lit. N.L. Nyrkina, 1914, Vol. I, pp. 31-36.

³⁸ D. Galanin, *Teoreticheskie osnovy vospitaniya*, *ibid.*, Vol. II, pp. 627-641 (see p. 633).

³⁹ H. Medick, D. Sabeau, *Emotionen und materielle Interessen in Familie und Verwandtschaft: Überlegungen zu neuen Wegen und Bereichen einer historischen und sozialanthropologischen Familienforschung*, in H. Medick, D. Sabeau (edd.), *Emotionen und Materielle Interessen. Sozialanthropologische und historische Beiträge zur Familienforschung*, Göttingen, Vandenhoeck & Ruprecht, 1984, pp. 27-54; Engl. transl. *Interest and Emotion. Essays on the Study of Family and Kinship*, Cambridge, Cambridge University Press, 1984].

application of education and upbringing, was an important educational factor⁴⁰. Rubinstein supported a model of the traditional family in comparison with others because: «based on an authoritarian principle, the family necessarily requires of its submissiveness, as well as obeisance, solidarity and solidarity, and well-known social habits, and it teaches not only through authority but also through love and mutual trust»⁴¹. Underlining the role of marriage in the interests of a child's upbringing, the philosopher declared that «in this sense the normal family is a whole complete unit; also when it is found at a low level of development and all its interests are addressed to material, earthly needs; nevertheless the reciprocal relations of the parents and children guide the family, even in the most elementary form, along the spiritual path [...] The family is not only a spiritual unit but must also be necessarily a spiritual-moral community. The family displays this characteristic even when its life is in general addressed to the bare struggle for existence because even if it is of a low level, within the family there is a dominant concern for the other members of the family [...] Love for the father and mother and gratitude for their worry and protection can be the ground from which altruistic sentiment will flourish»⁴².

The concept of the family devised by Rubinshtein was intended as a spiritual and moral community on condition that «only the atmosphere of activity and work will provide the opportunity for moral aspects, reciprocal relations and altruism to bloom»⁴³. Indeed insisting on the educational role of the family, Rubinshtein arrived at the conclusion that «the complete family as an educational organ is a spiritually moral union (community) of productive labour, altruistic within its bounds comprising parents and children, which has a stable and consistent character and is bound as a unit non only by the house and by the economic dependence but also by a host of feelings grounded in the blood relationship»⁴⁴.

In order to underline the fundamental role of the mother in the upbringing of the child, in spite of the external domination of the husband on the family, the philosopher highlighted «the antagonism between motherhood and the women's work»⁴⁵. His position was probably one of the most conservative from the point of view of the family structure and of woman role in the family, but it shared the fundamental role attributed to the woman by August Bebel' in early childhood upbringing.

These debates and reflections anticipated several aspects which were also to be discussed after the October Revolution which modified the model of the

⁴⁰ M.M. Rubinshtein, *Krizis' sem'i kak organa vospitaniija*, «Vestnik Vospitaniija», 3, 1915, pp. 33-81.

⁴¹ *Ibid.*, p. 52.

⁴² *Ibid.*, p. 51.

⁴³ *Ibid.*, p. 54.

⁴⁴ *Ibid.*, p. 55.

⁴⁵ *Ibid.*, pp. 52, 78-80.

traditional family, considered as bourgeois: of the woman as mother of the family to her claim to the social role of worker in the name of a family founded on the natural descent and married love.

2. *The revolutionary family model of the Bolshevik regime*

After the October Revolution, the family was principally a matter for political leaders and doctors who tried to shape it along the lines of the socialist model. In the first place, this was to improve the condition of the woman and, consequently also of that of children, particularly for those born outside wedlock. It was also an attempt to make the family an instrument for demographic rejuvenation, even though this aspect was more central during the Thirties⁴⁶. Political leaders and jurists, by sealing a pact which turned out to be disastrous for the entire normative system of the communist regime, demanded the right to change society through reforms dictated from on high which were too distant from the reality of family life at the time. Doctors dedicated themselves mostly to the reproductive aspects of sexuality which became an affair of the state, while pedagogues, already active before the Revolution, were engaged instead, in the reform of the schools and the educational institutions set up to help children orphaned during the First World War, the civil war and the terrible famine of 1921, denying the role of the family as the main source of children's education. Intent on educating the future collective citizen, there were pedagogues applying the principles of American active pedagogy and others, less progressives who were instead closer to the Marxist pedagogy of work, partly because child labour could contribute to the upkeep of the institutes. The more revolutionary political leaders supported a conception of social education as a form of education to the State, in function of the socialist vision of the family, which they were then forced to abandon when they realised that the state institutions were not in a position to help the mass of homeless children⁴⁷.

It is not surprising therefore that the pedagogues and paedologists did not, except rarely, investigate child upbringing in the family and the role of parents in the kind of social relations to be established because they concentrated on developmental psychology, learning and the learning processes of the different age groups in the collective institutions, as suggested by the hundred or so works which, after paedology was repressed, were banned and taken out of circulation after 1936. If any pedagogue was interested in new-borns, this was

⁴⁶ D.L. Hoffmann, *Cultivating the masses. Modern State practices and Soviet Socialism, 1914-1939*, Ithaca and London, Cornell University Press, pp. 125-180.

⁴⁷ D. Caroli, *L'enfance abandonnée et délinquante dans la Russie soviétique (1917-1937)*. Préf. de Jutta Scherrer, Paris, L'Harmattan, 2004, pp. 165-170.

only to educate mothers to look after their offspring more effectively in a pro-natalist perspective, and not with a view to improving family relations from the standpoint of communist education, which was charged to state institutions⁴⁸.

If read from this perspective, the main family reforms studied to date take on new significance because they mark the beginning of the educational function of the ideological norms to the detriment of pedagogy in early childhood education. The reform of the family, which was one of the first to be realized by the regime in the name of a greater equality for women in society, was in fact too radical for a country which was mostly rural and not prepared to relinquish the traditional family bonds upon which land distribution in rural communities was still based until 1928. The revolutionary fervour undoubtedly obscured the outcomes of many reforms which fell apart during their implementation and forced the regime to backtrack.

The first family reform after the October Revolution took place between 1917 and 1927, when a new Code of Laws on Marriage, the Family and Guardianship came into force; the second reform occurred between 1927 and 1936 when Stalin suppressed all of the revolutionary legislative aspects which had created the most modern families in the world, transforming it into a political tool of a state that increasingly encroached upon its citizens' private lives. Historians are of the more or less explicit opinion that both reforms ultimately aimed at demographic increase⁴⁹, but in actual fact it was the second which was mostly oriented this way, celebrating the mother of large families which concealed the stark reality of family life at the time.

The first family reform, well-known by the historians, abolished all aspects of the traditional family, considered a bourgeois institution *par excellence*, in name of a union characterised by equality between the man and the woman, and between legitimate and illegitimate children, thus causing the family to relinquish its role in child support which the State would gradually take on⁵⁰.

This reform entailed considerable change for the relations between the sexes, in particular for women's emancipation which was considered the starting point and, as a consequence for children's upbringing and education. First of all divorce granted women the right to break off an unhappy marriage and, the civil union meant that she should be considered by her husband as a comrade and not just his helpmate. These legislative amendments were accompanied by more or less radical political discourses on the definitive extinction of the family. The famous revolutionary and diplomat Alexandra Kollontai (1872-1952) was

⁴⁸ L. Kirschenbaum, *Small Comrades. Revolutionizing Childhood in Soviet Russia, 1917-1932*, New York, Routledge Falmer, 2001, pp. 44-49 and 54-57; Caroli, *Cittadini e patrioti*, cit., pp. 189-200.

⁴⁹ A. Blum, *Socialist Families?*, in Kertzer, Barbagli (edd.), *History of the European Family*, cit., Vol. III, pp. 198-237.

⁵⁰ W. Berelowitch, *Les débuts du droit de la famille en RSFSR: pourquoi et comment*, «Cahiers du Monde russe et soviétique», vol. 22, n. 4, 1981, pp. 351- 374.

amongst the protagonists of this reform, characterised by fairly radical stances on free love and sexuality in general, some considered quite amoral from the point of view of the communist moral. She placed the natural disappearance of the family in relation with the development of state institutions for the upbringing of children, arguing that «In place of the traditional family a new form of relationship between the man and the woman will arise: a union based on the spirit of comradeship and cordiality between two free and independent members»⁵¹.

Marriage, in fact, was abolished by the same Code of the Laws regarding marital status, marriage, family and the Guardianship of the Russian Republic (December, 18th 1918), which based kinship on «natural descent» i.e. blood relations, with the intention to give legitimate and natural (illegitimate) children equal rights and the introduction of the same rights for women over decisions concerning their children. For this reason wedlock was no longer the legal basis of the family and laws of succession, nor of parental authority which was transformed into parental rights for children⁵².

The reform was accompanied by an intense political debate on children's education which expressed the more or less radical positions on the future of the family and its social relations, these being the views of political leaders rather than of pedagogues. There were those who argued that the nationalization of children need not mean abolishing the family completely in favour of a communist education outside the family, expressing their hopes that pre-school institutions for children (nurseries, children garden and colonies) would be organised, so that state education (described by A. Bebel) would not completely eliminate the educational role of the family (Zinaida Tettenborn). For others, the nationalisation of children meant wrenching them from the brutal influence of the family and bringing them up in communist children's gardens and schools (Zlata Lilina), in accordance with N.I. Bucharin and Evgenii A. Preobrazenskii who proclaimed in his *Abc of communism* that society had a primordial and fundamental right in their education⁵³.

This reform of legislation on the family, which intended to revolutionise the social relations right from the first cell of the State, presupposed the organisation of a network of services aimed at women and childhood in an attempt to safeguard procreation as much as the actual care and upbringing of children. The protection of maternity and children's health was developed concretely only in 1922 thanks to the creation of the State Scientific Institute

⁵¹ W. Berelowitch, *Modèles familiaux dans la Russie des années 1920*, in Kerblay (ed.), *L'évolution des modèles familiaux dans les pays de l'Est européen et en U.R.S.S.*, cit., p. 33; Caroli, *L'enfance abandonnée et délinquante dans la Russie soviétique (1917-1937)*, cit., pp. 171-173.

⁵² *Pervyj kodeks zakonov, ob aktach grazhdanskogo sostojanija, brachnom, semejnomy i opekunskom prave*, Moskva, Izdanie NKJU, 1918, pp. 49-50.

⁵³ Caroli, *L'enfance abandonnée et délinquante dans la Russie soviétique (1917-1937)*, cit., pp. 171-173.

for the Protection of Maternity and Infancy⁵⁴. Furthermore, the family became the object of a discourse more concerned with the couple's sex life than with parenting – which was delegated to the state institutions – and it became the object of social control by the medical science which was to develop eugenically oriented measures in order to improve the human race⁵⁵. This policy was intended to increase fertility and birth rates but this did not occur. Indeed the maternity protection programme (as Kollontai had intended it) included sixteen weeks of fully paid leave, free birth clinics, on-site nursing facilities and breaks but the reform of social protection crumbled due to insufficient funds. Opponents of abortion, legalized by the decree of 1920, were concerned about the health of the woman as a worker, but from 1927, and in particular from the beginning of the Thirties until 1936, were mostly concerned with the demographical aspect⁵⁶.

As far as early childhood education was concerned, pedagogues were obviously engaged not in theorising about family relations but instead on devising methods for the communist and collective education which diverged from views on community education, yet the serious problem of children orphaned by the civil war and the 1921 famine forced them to aid and educate these children first and to postpone the utopia of a family-free upbringing⁵⁷.

Naturally, once the emergency of homeless children, who were a public menace, was overcome, pedagogues including V.N. Shulgin, who theorised the social education, proposed a communist school model similar to a community rather than a school with external attendance for children who continued to live in the family. In particular in his 1924 work *The main questions of the social education*, V.N. Shulgin drew inspiration from the methods of the American pedagogue John Dewey's active pedagogy for the education of the new communist generation⁵⁸.

But the main reason for abandoning the reform, close to that of the presence of the homeless children, was that it dealt with a fictitious model of the family which was not applicable to the rural population which still formed the vast majority (in 1917, 82 %) of the nation's people⁵⁹, who calculated land

⁵⁴ B.Q. Madison, *Social Welfare in the Soviet Union*, Stanford, Stanford University Press, 1968, pp. 35-48; W.Z. Goldman, *Women, the State & Revolution. Soviet Family Policy & social Life, 1917-1936*, Cambridge, Cambridge University Press, 1993, pp. 1-60; Hoffmann, *Cultivating the masses*, cit., 143-180 (see. p. 173).

⁵⁵ Hoffmann, *Stalinist values*, cit., pp. 97-105.

⁵⁶ H.K. Geiger, *The Family in Soviet Russia*, Cambridge, MA., Harvard University Press, 1968, p. 84; S. Gross Solomon, *The demographic argument in Soviet debates over the legalization of abortion in the 1920's*, «Cahiers du monde russe et soviétique», vol. 33, n. 1, 1992, pp. 59-81.

⁵⁷ Caroli, *L'enfance abandonnée et délinquante dans la Russie soviétique (1917-1937)*, cit., pp. 165-173. See also L. Bernstein, *Fostering the next generation of socialists: patronirovanie in the fledgling Soviet State*, «Journal of Family History», vol. 26, n. 1, 2001, pp. 66-89.

⁵⁸ V.N. Shul'gin, *Osnovnye voprosy social'nogo vospitaniya*, Moscow, Glavlit, 1924.

⁵⁹ I.A. Kurganov, *Sem'ja v SSSR, 1917-1967*, New York-Frankfurt am Main, Possev Verlag, V.

ownership on the basis of the number of members of the household and who experienced a drastic decline even before collectivisation uprooted millions from the land: «the average size of the peasant household in Russia was 6.3 persons in 1897, 6 in 1917, and 5.1 in 1924»⁶⁰. Furthermore, during the distribution of land in accordance with the Code of 1928, the position of the collective was strengthened by giving them preference in the allotment of land because they comprised poor or middle peasants who had little or no land. Therefore, the peasant woman who was penalized by the social protection system, would, if she abandoned the community, find herself literally out on the streets, begging⁶¹. So it was simple impossible to make this model work given the enormous ethnic differences found within the Soviet population which still held to the customary laws of the different peoples who resisted civil marriage just as much as the nuclear family⁶².

These social problems caused a raging debate in the middle of the Twenties which resulted in the restoration of some elements of the traditional family, in particular of those intended to assure financial support to the woman and her children from husbands and fathers, some of whom had probably found in the legislation the means to shirk their paternal responsibility. Amongst the more visible aspects were the requirement to register a divorce in the marital status records, the intensification of the search for paternity for payment of alimony, and the adoption of children which would allow the institutions to take in children living on the street for several years⁶³. This reform was accompanied by several measures which criminalized parents for negligence toward the education of their children in the same way as educators of the orphanages could be accused of the malfunctioning and of the chaos which had in fact been caused by the economic crisis⁶⁴.

In the history of family relations from the end of the Twenties until the end of the Thirties, the collectivisation of the land and forced industrialisation had an important effect for different reasons: mass access of women to unskilled work, considerable mobility of family members because of urbanisation, and

Gorachek, 1967, p. 64.

⁶⁰ M. Confino, *Le droit coutumier et l'étude des mentalités paysannes en Russie*, in M. Confino (ed.), *Société et mentalités collectives en Russie sous l'Ancien Régime*, Paris, Institut d'Études Slaves, 1991, pp. 423-432 (see p. 429).

⁶¹ D. Atkinson, *The End of the Russian Land Commune 1905-1930*, Stanford, CA., Stanford University Press, 1983, p. 343; Goldman, *Women, the State & Revolution*, cit., pp. 237-253.

⁶² D. Northrop, *Subaltern Dialogues, Subversion and Resistance in Soviet Uzbek Family Law*, in L. Viola (ed.), *Contending with Stalinism. Soviet Power & Popular Resistance in the 1930s*, Ithaca and London, Cornell University Press, 2002, pp. 109-138.

⁶³ J. Quingley, *The 1926 Soviet Family Code: Retreat from Free Love*, «Soviet Union/Union Soviétique», vol. 2, n. 2, 1979, pp. 166-174; W.Z. Goldman, *Freedom and its consequences: the debate on the Soviet Family Code of 1926*, «Russian History/Histoire Russe», vol. 11, n. 4, 1984, pp. 362-388.

⁶⁴ Caroli, *L'enfance abandonnée et délinquante dans la Russie soviétique (1917-1937)*, cit., pp. 242-252.

the separation of families due to the deportation of the rich peasants (*kulak*). Collectivisation marked the destruction of the extended family in the rural community and the spread of the nuclear family in both urban and rural contexts. This was in fact the prevailing structure because «the effect of the second wave of migration during industrialisation of the 1930s is reflected above all in the noticeable decrease in the share of extended and multiple households between 1926 and 1939, and the corresponding increase in the share of simple family households. Migrants who had moved from village to town in the first half of the 1930s had by the end of the decade married and founded families, but had not managed yet to sufficiently secure their position in the urban environment to bring over their parents from the countryside, although family reunion of this kind was already being reported from the mid-1930s on»⁶⁵.

These dramatic events were certainly perceived differently by family members who considered their blood relations closer or more distant on the basis of a range of factors, including their social category, or their geographical environment – an urban one seeming to generate more cohesive ties. As Sheila Fitzpatrick argues «More families were torn apart by the Great Purges, which left spouses and children stigmatized for the connection with ‘enemies of the people’. Some wives of victims were sent to camp themselves, other were exiled. Their children often ended up with relatives and friends or, worse, in orphanages under new names»⁶⁶. Obviously, the introduction of rationing in the cities, the scanty welfare benefits offered by the Trade unions on the basis of the productivity of individuals threatened by deportation in the Great Purges and the hunt of the «enemies of the people» made individuals extremely vulnerable to life’s adversities⁶⁷. In the face of this tragic experience, family relations were inevitably jeopardized because parents began to abandon their children: they would find themselves on the street together with other children who had lost their parents in the 1932 famine or who were simply parentless because their fathers had absconded to avoid paying alimony⁶⁸.

Alongside this situation of general precariousness for childhood, statistics demonstrate a deep demographical crisis which can be partly explained by the mass entry of women into industry and also by the effects of the legalization of abortion: «An extensive demographic study in 1934 revealed that the Soviet birth rate overall had fallen from 42.2 births per thousand people in 1928 to 31.0 in 1932» [...]; «By the mid-1930s, the number of abortions in the

⁶⁵ S. Afontsev, G. Kessler, A. Markarevich, V. Tyazhelnikova, T. Valetov (edd.), *The Urban Household in Russia and the Soviet Union, 1900-2000: Patterns of family formation in a turbulent century*, «The History of the Family», n. 13, 2008, pp. 178-194 (see p. 183).

⁶⁶ S. Fitzpatrick, *Everyday Stalinism. Ordinary Life in extraordinary times: Soviet Russia in the 1930s*, Oxford, Oxford University Press, 1999, pp. 139-163 (see p. 140); N.B. Leбина, *Povsednevnaja zhizn' sovetskogo goroda 1920-1930 gody*, Spb, Letnij Sad, 1999, pp. 178-204.

⁶⁷ Caroli, *La protection sociale en Union Soviétique*, cit., pp. 223-253.

⁶⁸ Fitzpatrick, *Everyday Stalinism*, cit., pp. 140-141.

Russian Federation almost equalled the number of births (1,319,700 abortions in hospitals versus 1,392,800 births in 1935). In large cities abortions far outnumbered births; there were 57,000 births and 154,600 abortions recorded in Moscow in 1934»⁶⁹.

The failure of the social policy of the first decade of the regime did not therefore provide the desired results and forced the regime to reconsider the role of the family and of parents in their children's upbringing. It seemed indeed that parents took no interest in their children, as widespread juvenile hooliganism and social disorders would suggest; during 1935 more severe punishments were introduced for juvenile delinquency and parents who neglected their responsibilities. With the decree of June, 27th 1936 the *All-Union Code of Family Law* (which replaced the separate Codes of the different Republics) restored the family by introducing stricter norms in case of divorce (both spouses had to be present for the divorce and pay progressively higher sums in case of repeated divorce) especially with regard to the payment of alimony; *de facto* marriage was recognized with the payment for children in relation to the parents' salary⁷⁰. Furthermore, as D.L. Hoffmann stressed «The same decree that outlawed abortion granted a woman a two thousand ruble annual bonus for each child they had over six children, and five thousand ruble bonus for each child over ten children. These bonuses drew an immediate response from women with seven or more children»⁷¹.

This demographic policy was promulgated in the context of precariousness and fear in the years of the Great Terror during which individuals not only were afraid to display their private lives but also hid their true origins, often noble, and burned their family archives⁷². Keeping pace with this, within the educational sciences, theories regarding the role of parental education were encouraged. It is not by chance that paedology, which investigated methodologies for the education of abandoned and orphaned children, was completely abolished and outlawed for being a false anti-Marxist science on July, 4th 1936⁷³. The orphanages themselves, which had been subject to several reforms in order to educate the «new soviet man», were transformed into temporary detention centres for the children of «enemies of the people», victims of the repressions,

⁶⁹ Hoffmann, *Stalinist values*, cit., p. 98; Idem, *Cultivating the masses*, cit., p. 137.

⁷⁰ Madison, *Social Welfare in the Soviet Union*, cit., pp. 42-46; B. Kerblay, *Familles socialistes*, in Burguière, Klapish-Zuber, Segalen, Zonabend (edd.), *Histoire de la famille*, cit., pp. 437-473; Goldman, *Women, the State & Revolution*, cit., pp. 337-343; Hoffmann, *Stalinist values*, cit., pp. 112-117.

⁷¹ Hofmann, *Cultivating the masses*, cit., p. 145.

⁷² E.D. Jakovlev, *Zhizn' na perelome vremen*, in T.A. Bek, I.L. Shcherbakova (edd.), *Chelovek v istorii. Rossiya – XX vek. Sbornik rabot pobeditelej (Vserossijskij Konkurs istoricheskich issledovatel'skich rabot starsheklassnikov)*, Moscow, Obshchestvo «Memorial» – Izdatelstvo «Zven'ja», 2001, Vyp. I, pp. 231-244.

⁷³ See the second part of «Children without education» by Caroli, *Cittadini e patrioti*, cit., pp. 103-165.

where they were taught to hate their parents⁷⁴. It was in this context, characterised by mass violence against the populace, that Anton S. Makarenko, famous for his engagement in the re-education and rehabilitation of homeless and delinquent children, published several works reminding parents to bring up their children as future citizens of the Soviet collective.

3. *Anton S. Makarenko and the Soviet 'Collective family'*

In the context of the restoration of the family and the repression of paedology which had dealt with the collective education of children, the famous pedagogue Anton S. Makarenko published two important works: *Lectures for parents* written in 1937 for radio broadcast and *The book for parents* (well-known with the title *The collective family*) written together with his wife Galina Stachievna Makarenko during 1936-1937⁷⁵.

Makarenko was already well-known for his work *An Epic Education* in which he described the education of homeless children and juvenile delinquents in the «Gor'kij» colony which he directed in the Twenties. The aim of Makarenko's works was twofold. On the one hand, Makarenko sought to devise the principles corresponding to the moral code of the communist citizen, and on the other, to transform the family into a sort of social institution in preparation for public life in Communist society. In those same years, Stalin himself dedicated his time to devising the principles upon which school history textbooks were to be based, as well as the norms to be adopted by the Organisation of the Communist Youth⁷⁶.

Keeping this vast cultural operation in mind, the restoration of the family is to be placed within the perspective of demographical increase or the limitation of its autonomy, as Anna Di Biagio and David Hoffmann argue, but its transformation into the educational unit *par excellence* meant that it was seen not so much as a private institution but as an institution for the education of the «citizen and patriot»⁷⁷.

⁷⁴ Caroli, *L'enfance abandonnée et délinquante dans la Russie soviétique (1917-1937)*, cit., pp. 254-262.

⁷⁵ A.S. Makarenko, *Lekcii o vospitanii detej*, in Id., *Sochinenija v semi tomach*, ed. by A.I. Kairov, Moskva, Izdatel'stvo Akademii pedagogicheskich nauk, 1951, Vol. IV, pp. 341-428.

⁷⁶ D. Caroli, *New sources for the teaching of history and of the Constitution in the Soviet Union. Textbooks and school exercise book (1945-1965)*, «History of Education and Children's Literature», vol. 4, n. 2, 2009, pp. 251-278.

⁷⁷ A. Di Biagio, *La famiglia sovietica nella «grande ritirata»*, in E. Asquer, M. Casalini, A. Di Biagio, P. Ginsborg (edd.), *Famiglie nel Novecento. Conflitti, culture e relazioni*, Roma, Carocci, 2010, pp. 117-137 (see p. 131); Hoffmann, *Stalinist values*, cit. pp. 105-109.

While Makarenko's first work presents a theory of educational principles that are useful for the Soviet family, the second is a series of short fictional stories of concrete family situations (of which only one is inspired by reality) which offers a comparison of the educational models inside the different families⁷⁸.

The main postulate of *Lectures for parents* was that the family made the parents equal members of society and, in virtue of this principle; they also had equal duties toward their children, restoring the educational responsibility which the revolutionary propaganda had deprived them of.

The lectures concerned the fundamental principles that should govern family relations and ensure a happy family. These principles can be subdivided into two groups. The first encompasses those which regulate the relation between parents and their children, i.e. authority and discipline. The second group concerns all the activities, skills and knowledge that parents should pass on to their children inside the family on some important aspects of the life of a communist citizen: play, work, family finances, sexuality and feelings, and finally, culture⁷⁹.

Like the preface to the treatise on the general principles of family education, Makarenko declared that: «The most important part of our lives is bringing up our children. They are the future citizens of our country and of the world. They will create history! Our children are the future fathers and mothers who will, in turn, rear children. They must grow up to be good citizens and good fathers and mothers»⁸⁰.

According to Makarenko a good education was also a guarantee for a good old age and education was easier than re-education. Parents, although they did their job well, would forget that their children would grow up to be the builders of communism. Indeed the new family relations were to be based on the fact that «the family ceased to be the family of the father» because the mother had the same rights toward her children as the father: «our family submits not to the only power of the father, but represents a Soviet collective. In this collective they have well-known rights»⁸¹.

This collective consisted of members with equal rights, the only difference being that the parents guide the family while the children have to be brought up in the family. The upbringing depends on the composition of the family (it was easier in a numerous family because it accustomed the child to living in the collective), the harmony of the parents and personal behaviour: «Family affairs cannot be separated from the affairs of society. Your activities in the society or at work must be mirrored also in your family; your family should see you

⁷⁸ G. Hillig, *Kak A.S. Makarenko otkryl sem'ju. K istorii sozdaniija i vozdejstvija Knigi dlja roditelej 1936-1939 gg.*, «Cahiers du Monde russe et soviétique», vol. 33, n. 1, 1992, pp. 83-105.

⁷⁹ Makarenko, *Lekcii o vosпитaniiu detej*, cit., pp. 341-428. For an English translation from 1961 see: <<http://www.marxists.org/reference/archive/makarenko/works/lectures/index.html>> (last access: November 19th, 2012).

⁸⁰ *Ibid.*, p. 341.

⁸¹ *Ibid.*, pp. 343-344.

as a political, civic-minded person and not separate this image from her image of you as a parent. Whatever happens in our country will reach your children through your thoughts and feelings. They should be interested in what is going on at your work, what makes you happy or sad; they should know what kind of community activity you are involved in; they should be proud of your successes and your service to society. This will not be healthy praise, however, if it is only pride in your good clothes, your automobile or your hunting rifle»⁸².

Makarenko continues by also saying that «The parents' own self-discipline and respect toward their family – control at every step – this is the most important method of bringing up children correctly»⁸³. Indeed, education was a constant work of correction: «children must have help at the right moment, be stopped at the right moment, and be guided», because the educational work was first of all the work to organise the family life well. In this sense, a fundamental educational concept was the authority of the parents, intended as the guidance of an «older member, who is responsible for the collective». Concerning the authority of the parents in educating the future citizen, this was exerted in the name of the society and not simply out of obedience⁸⁴. The Soviet family based authority not on artificial principles aimed at obedience at any cost. It did not favour repressive authority which maintained distance, but common sense and feelings (the authority of reasoning, love, goodness and friendship). Indeed, «the main foundation of the parents' authority consists only in the life and labour of the parents, in the face they show and in their behaviour. The family is a great and responsible matter. Parents have to guide it and take responsibility for it before society, for their own happiness and the lives of their children»⁸⁵.

The civil authority of the parents was for this reason an authority exerted by a member of the collective as a member of the collective. The father himself had to take action to earn his authority but also to control his child: «For this reason you should know first of all what the child is interested in, likes and dislikes, wants and does not want, who the child is friends with, plays with and what the games are, what he reads and how he reacts to what he reads. When he studies at school, parents should know his relations with the teachers, what his difficulties are and his behaviour in class»⁸⁶.

The authority should not be oppressive and should not be exerted by spying on his children but be a form of mutual help: «real authority rests upon your social activity as a citizen, on your feelings as a citizen, on your behaviour, on your knowledge of your child's life, on the help that you give him and on your responsibility for his upbringing»⁸⁷.

⁸² *Ibid.*, p. 347.

⁸³ *Ibid.*

⁸⁴ *Ibid.*, p. 349.

⁸⁵ *Ibid.*, p. 358.

⁸⁶ *Ibid.*

⁸⁷ *Ibid.*, p. 360.

Closely connected to the principle of authority was that of discipline, again fundamental for the communist youth. Indeed it was not simply obedience but it was supposed to correspond to the communist ethic in that «From the Soviet citizen we expect a more complex form of discipline. We demand that he not only understand why it is necessary to fulfil this or that order but that he actively try to carry out the order in the best possible way. Moreover, we expect that he be prepared to fulfil his duties at any moment without waiting for directions or orders but using his initiative and creativity [...] On the contrary, we expect the Soviet citizen to refrain from those steps or actions which can cause advantage or pleasure only to himself, while they can damage other persons or society as a whole [...] But in relation to our general enemies we request from each person a firm position, a constant conviction, constant surveillance without attention to any malevolence or danger [...] A disciplined Soviet citizen develops from the sum of correct influences among which political education, general education, books, papers, work, social activities, and even play, relaxation and recreation, will have a place. Only by the action of all these influences can proper education take place, and only from this can a disciplined person for socialist society emerge»⁸⁸.

According to Makarenko, discipline meant the result of the whole educational activity, while the regime was a sort of lifestyle which concerned the educational style of the parents and was flexible according to the conditions: «In the context of family life, there are without doubt many cases where a caress is needed, or a talking-to, strictness and flexibility. But as far as the regime is concerned, all these form have to bow to the main thing, which is the best and only way: willingness»⁸⁹.

The regime was another very important aspect because its precocious adoption by children from a tender age could prevent infringements and punishments. The family regime should be reasonable in character and conform to the aim of bringing up children to the habit of rational movement and the capability to hold it back. A very effective means was the parents' resolute tone of voice, even if quiet and even, because: «We affirm that only a genuine and serious working tone can create the calm atmosphere in the family that is necessary for the proper upbringing of children, such as the development of mutual respect and reciprocal love between the members of the family»⁹⁰. This tone should be used with children over 2 and a half years, without anger and a reasonable manner. Only in the case of disobedience can the tone become more official in order to restore the proper regime and avoid the punishments which are sometimes admitted⁹¹.

⁸⁸ *Ibid.*, pp. 361-362.

⁸⁹ *Ibid.*, p. 369.

⁹⁰ *Ibid.*

⁹¹ *Ibid.*, p. 372.

Parenting should also be able to manage other aspects of the life of the future collective citizen, such as play, work, economical life, sexuality, feelings, reading and culture in general, which were to form the content of the education and shape a communist moral. Of course, the lack of religious education had to be supplemented with other values and behaviour norms that Makarenko tried to outline in a more concrete way in his second work dedicated to the family.

The Book for parents comprises 8 stories (originally forming 2 volumes) which present some representative examples of parents manifesting their educational responsibility in order to cope with crisis situations. The book mainly describes families in an urban environment where the simple family (consisting of an intact conjugal family unit) predominates, and the role of an external intermediary who regulated family conflicts within the private life of the family. Indeed, «the percentage of simple family households rises from an estimated low in 1923 to a high in 1939»⁹². There were no examples reflecting rural life which had experienced profound changes from the point of view of property: from 1935 the *kolkhoz* statute guaranteed the family the private property of the farmhouse and a small amount of livestock (including the use of a small plot of land)⁹³.

In the family described it emerges that each aspect of its private life should be seen in relation to social and public life in order to educate a citizen of a classless society starting with family relations between parents and children, sisters and brothers, and children of the same age. It deals with fictional cases which represent the relation between the private and the public sphere in a very complex way. Lewis H. Siegelbaum underlines that private life «is a multiplicity of layers rather than a flat or unitary conceptualization of the private spheres. It ranges from the intimacy of sexual behaviour to the relative ‘publicness’ of friendship circles and the owning and exhibiting of car. But in every case, the Private is neither hermetically sealed from nor necessarily in an antagonistic relation with the Public. It is rather conceived to be in a dynamic, interactive tension with the public, which is itself conceived as a complex, multilayered category» [...] ⁹⁴.

In this perspective, Makarenko presents situations in which one can observe a negotiation process between the personal and the collective interests in the family during which the educational intervention of a third person often took place, particularly when the parents were unable to regulate their relations with

⁹² And continues to over around the 50% during the remainder of the Soviet period to fall back to an all-time low of 41% in 2002 (see Afontsev *et al.*, *The Urban Household in Russia and the Soviet Union*, cit., p. 183).

⁹³ B. Kerblay, *Familles socialistes*, in Burguière, Klapish-Zuber, Segalen, Zonabend (edd.), *Histoire de la famille*, cit., pp. 437-473 (see pp. 442-443).

⁹⁴ L.H. Siegelbaum, *Introduction: Mapping Private Spheres in the Soviet Context*, in L.H. Siegelbaum (ed.), *Borders of Socialism. Private Spheres of Soviet Russia*, Houndsmills, Basingstoke, Hampshire, Palgrave Macmillan, 2006, pp. 1-21 (see p. 3).

their children. In the introduction to his book Makarenko argues that «A Soviet person cannot be educated by the direct influence of one personality, whatever qualities this personality may possess. Education is a social process in the broadest sense of the term. Everything contributes to education: people, things, events, but especially people. Of these, parents and teachers hold first place. The child enters into an infinite number of relationships with the whole complex world around him. Each one of these relationships is inevitably developing, overlapping with other relationships, and becoming more complicated as the physical and moral growth of the child continues.

Nothing in this ‘chaos’ seems to yield to any calculation. Nevertheless at each given moment definite changes are created in the personality of the child. And it is the task of the educator to direct and guide this development.

Senseless and hopeless is the attempt made by some parents to shield the child from the influence of life and substitute individual domestic training for social education. It is bound to end in failure: either the child breaks out of the domestic prison or you produce a freak»⁹⁵.

The parents are responsible for the education of the child but the pedagogy of the family collective is unable to mould the child out of nothing because: «The decisive factor in successful family upbringing lies in the constant, active, and conscious fulfilment by parents of their civic duty toward Soviet society. In those cases where this duties is really felt by parents, where it forms the basis of their daily lives, there it necessarily guides the family’s work of upbringing too, there no failure or catastrophes are possible»⁹⁶.

Of the eight stories which highlight particular family situations, the most interesting are those concerning the Vetkin family with their thirteen children (the third story) which was an ideal of the collective family, the Babich and Lysenko families compared on their use of money (the forth story) and the Ketov family on the upbringing of an only child (the fifth story) and the Giukov family (the sixth story).

The Vetkin family was a close and happy family and lived in the middle of the Thirties. The description of its life is made in the third person because Makarenko himself in 1926 knew this family who taught him a lot because of its «handcrafted pedagogical organisation». In the story the father of the family, Stepan Denisovich Vetkin, stands out. He is a school teacher who decides to work as a smith in order to provide for his 13 children. Vetkin’s sons are striking due to their calmness. They always act as advocates of peace, they are bright, active, full of initiative, avoiding conflicts: «Yes. That’s a domestic team. They go to school together, and at home if there’s something to be done they always

⁹⁵ Makarenko, *Kniga dlja roditelej*, in Id., *Sochinenija v semi tomach*, cit., p. 20.

⁹⁶ *Ibid.*, pp. 49-78. See also the English translation: A.S. Makarenko, *The Collective family. A handbook for Russian Parents*, with an introduction by U. Bronfenbrenner, transl. by R. Daghish, Gloucester, MA., Peter Smith, 1973.

set about it together. They'll make good workers. And they are all boys, too»⁹⁷. Indeed «Stepan Denisovich's way of bringing up his family is not perhaps remarkable for its technical perfection, but it touches the most sensitive chords of Soviet educational thought; it possesses a good, healthy collective spirit and plenty of good creative optimism, and there is also that sensitive consideration of details and trifles without which real educational work is utterly impossible. Such considerations of details is no easy matter. It requires not only attention, but also constant and patient thought»⁹⁸. The life of the Vetkin family did not involve outside intervention and this indicated good parenting ability. For his social behaviour demonstrated inside the factory Vetkin was admitted to the Communist Party in 1930. This family, whose collective spirit could cope with necessity, was a model for Chuba's family whose style was marked disorder and casualness⁹⁹.

With regard to this family model, the others were to cope with different crisis situations caused by life's problems: money, the selfishness of the parents and the abandonment of the children. The fourth story compares the attitudes of three families regarding money. While in Nikolai N. Babich's family there was an overly strict distribution of money, Nikita K. Lysenko's family were not careful with it and Pyzhov's family used the family budget (held in common) without keeping it secret from the children. The latter was similar to the Vetkin family and represented a model because «Here money smelled neither of an affable God nor of a cunning devil. It was simply one of the normal conveniences of life, requiring no moral strain. The Pyzhovs looked upon money as a useful everyday accessory. That was why their money was not left lying about in drawers nor hoarded up with miserly fear and trembling. Ivan Prokofievich looked after it with simple and convincing seriousness, like any other necessary object»¹⁰⁰.

Also very interesting is the fifth story which sets up against two families devoid of collective spirit, which reveals a selfishness on the part of the parents: the family Ketov was an anti-Soviet family because it had preferred an only child, while Giukov abandoned his family. The father, Pyotr Aleksandrovich Ketov, worked in one of the central institutions of the People's Commissariat of Agriculture. After the birth of his first child Viktor, he decided not to have other children. From his childhood, the only child Viktor behaved as a prodigious boy because he progressed in his study of mathematics, but as he grew up his behaviour became very selfish. Viktor knew that he was at the centre of the family, its principle and its religion. He dropped out of Communist Youth and

⁹⁷ *Ibid.*, p. 52.

⁹⁸ *Ibid.*, p. 73.

⁹⁹ *Ibid.*, p. 77.

¹⁰⁰ *Ibid.*, p. 97.

did not demonstrate love to his father, refusing to buy him medicine after a surgical operation. As in other situations characterised by outside intervention from, it was the physician who intervened to reproach Victor's bad behaviour.

Giukov's family on the contrary was marked by another form of selfishness of the father, who abandons his wife Evgenija Alekseevna and his son for another woman. According to Makarenko, the description of the selfish father who does not take part in the son's upbringing and abandoned the family, is particularly negative. Evgenija's courage to marry again, her new husband Dmitrii taking on the responsibility of the family unit and upbringing, represents a model for other families and encourages them to take children from the orphanages and to bring up their own children without thinking first about their financial situation.

The exaggerated love of a mother toward the family is described in the seventh story which deals with sex education. The protagonist of the story, Vera Ignat'evna Korobka, a librarian who is particularly dedicated to her job, sacrifices herself completely for her family and finds herself neglected and without clothes to wear. In particular her daughter Tamara manifests a particularly selfish attitude towards the family because of her vanity, in spite of being a young member of the *komsomol* (Communist Youth Organisation). Thanks to the intervention of a worker, Andrej Klimovich, the daughter changes her tone and begins to help her mother, showing a good example for her brother. Andrej and Tamara take advantage of this education for their first ventures into affairs of the heart¹⁰¹.

Models of how a family in crisis can react emerge from these stories. Each one risked breaking up due to self-centredness which prevented the preservation of the unity of the domestic household, safeguard for the upbringing of a good citizen or of a person who knows how to behave in public and social life.

In conclusion, it is possible to note that the profound evolution in the ideological conception of the family and of the educational responsibility of the parents from the beginning of the Twenties produced important changes that must be interpreted in close correlation with the historical context. Nevertheless, policies regarding the family in the interwar period did not produce the expected result to increase birth rates: on the contrary a brusque demographical decline occurred as a result of a number of events¹⁰².

The condition of the woman changed considerably. Women were granted the right to enter factory work but in terms of family life, despite the liberalisation of divorce, in the vast majority of cases they found themselves coping alone with bringing up their children, often turning to their own mothers for help, because their husband had absconded. The children paid the consequences of

¹⁰¹ *Ibid.*, pp. 256-297.

¹⁰² Afontsev *et al.*, *The Urban Household in Russia and the Soviet Union*, cit., p. 178.

this, because besides the orphaned children of the beginning of the Twenties, there were also many children abandoned by their parents, the so-called *beznadzornnye* ('lacking surveillance') who found themselves on the street¹⁰³.

From the point of view of marriage, one can note two important aspects: the first is that the marriage age remained relatively low because «official propaganda and family policy favoured early marriage, both in order to boost the birth rate and as an alternative to early, extramarital sexual relationships. In line with this policy, marriage was officially recognized as a circumstance enhancing people's priority status on the housing allocation lists, and unmarried men above a certain age were liable to pay the so-called bachelor's tax»¹⁰⁴. Furthermore the demographic crisis was at the heart of the specific phenomenon of high remarriage rates: These «high rates of remarriage have been characterised as 'successive polygamy', the successive pairing of one man to several women, and as such a response to the persisting gender imbalance among the population. This resulted in very low rates of celibacy, both among men and among women, and consistently low rate of never married among the female population of all generation throughout the century»¹⁰⁵.

For this reason, it can be said that the family reform produced several changes but not the ones that had been expected because the behaviour which concerned the life of individual was conditioned mostly by the events of the time. These changes of the family are not visible in Makarenko's work on the educational role of parents. Undoubtedly Makarenko's idea of the family as an organism living in symbiosis with the surrounding society is very interesting from the educational point of view, but it did not refer to the dramatic events which destroyed the family with deportations, arrests and unjust condemnations. *The collective family* offered different civil solutions to couples coping with their crisis in order to avoid the divorce or the separation of the family, always arrived at thanks to the mediation of an external person. The quirks of life have seen *The Book for parents* translated into several languages and used as a model for the theory of family relations in societies dominated by a capitalistic economic system¹⁰⁶, the polar opposite of the model it was originally planned for, and often overlooking the fact that the work was written at the time of the 'Great Terror' of Stalinism».

¹⁰³ Fitzpatrick, *Everyday Stalinism*, cit., pp. 143-152.

¹⁰⁴ Afontsev *et al.*, *The Urban Household in Russia and the Soviet Union*, cit., p. 189.

¹⁰⁵ *Ibid.*, p. 188.

¹⁰⁶ Makarenko, *The Collective family. A handbook for Russian Parents*, cit., pp. IX-XXI.

Nineteenth century female education in the Slovak Region of the Austro- Hungarian Empire

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ABSTRACT: The paper focuses on the characteristics of female education in the Slovak region of the Austro-Hungarian Empire in the 19th century. In the selected geographical space – an area where the Slovak language was spoken though rarely used in schools – education was closely related to language distinctiveness and suppressed as a result of the political situation. Bearing in mind the complex social-political background and position of the Slovak nation within Hungary, the main aim of the paper is to present and characterise a few landmark points in the development of girls' and female education. The overview thus provides general information concerning the school system (legislation, types of school, content of the *curricula*) but also specific examples of associations, institutes and schools that promoted the education of girls and women.

EET/TEE KEYWORDS: Women's Education; Educational Policy; Slovak Language; Nationalization; Slovakia; XIX Century.

Introduction

Female education depends significantly on the general state and position of women in society and it is also closely related to the politics of a specific region. Thus, in comparison with some other European countries, female education at the beginning of the 19th century in the Austro-Hungarian Empire

had some specific characteristics due to the political situation and language diversity. Generally speaking, the education of girls in the empire did not lag behind other European countries¹, although its progress was relatively slow. However, if we focus on what is today Slovakia (Upper Hungary), the situation was unsatisfactory. One of the main causes of its slow progress was the political situation in the region and language suppression², as the Slovaks had to fight in the first place for general education in their *mother tongue*. The Slovak region did not form any separate administrative part and its economy concentrated on agriculture.

While the situation in scholarship concerning the issue has changed recently, female education in the Slovak part of the Empire is still not covered sufficiently. Female education before 1867 has been researched systematically only by Daniela Kodajová; general works about the development of the school system deal either with the question of female education very briefly or they avoid the topic³. This is caused first by a lack of sources, which makes a general characterisation of girls' education at different types of educational institutions until 1867 problematic. From then, state schools, whose agenda was archived, started to appear. Another reason is that after the Austro-Hungarian Compromise of 1867, the Hungarian language was introduced systematically to schools in the Hungarian part of the empire, which implemented suppression of any national education, girls' included.

1. 19th century female education. Pedagogic and cultural context

In the Western culture of the early 19th century it was generally accepted that a girl or a woman needed only reading skills, since writing would be sufficiently provided by her father, husband or a guardian⁴. This fact is also mentioned by

¹ The quality of education differed significantly between European countries and distinct regional and class differences in each country could be found. However, it was not just in the case of France that «the education of girls had not occupied in the concerns of government leaders the same place as of boys» (*Dictionnaire Pédagogique*, quoted in L. Clark, *Schooling the daughters of Marianne: textbooks and the socialization of girls in modern French primary schools*, Albany, NY., State University of New York Press, 1984, p. 5).

² Major landmarks of 19th-century political history of the Slovak region include the failure of the Hungarian revolution of 1848/49 followed by the Vienna neo-absolutism, the foundation of Matica slovenská in 1862 and the Slovak National Party in 1871. In 1867, the Habsburg Monarchy reconstituted as the dual monarchy of Austria-Hungary. The so-called Compromise of 1867 was followed by decades of strong Hungarianisation (Magyarisation), which emphasised the use of the Hungarian language at all levels of education.

³ It is important to mention the 2003 publication by Anna Tokárová *Vzdelanie žien na Slovensku* [Female Education in Slovakia]; however, only one chapter discusses the development of schools in Hungary in the 19th century.

⁴ D. Kodajová, *Odborné vzdelávanie ako predpoklad a prostriedok emancipácie* [Technical

L. Clark in relation to the education of girls in 19th-century France and explains that the main determinants of it were «the absence of any compelling economic need for writing, a shortage of teachers, and the slow pace of learning caused by the common practice of instructing one pupil at a time rather than an entire class»⁵. The notions of a dependent woman were so deeply embedded that to put any change into practice took significant time. This kind of thinking was so natural that not only society per se but first of all women had to change their perception of female education, which turned out to be a long-term process with its beginnings in the 1840s.

Reformers emphasised that besides traditional female virtues attributed to an ideal wife, a wider scope of knowledge – acquired only through appropriate education – was important if the next generation were to be properly raised. One of the major supporters and reformers of female education in the Slovak region was Daniel Lehotský (1759-1840)⁶. In his work *Kniha o moudrém a křesťanském vychování dítek, k užitku vlasti své milé Uherské sepsaná z roku 1786* [A Book on the Wise and Christian Education of Girls for the Benefit of the Dear Hungarian Motherland, Written in 1786] he proposed that girls should be educated and instructed in writing, counting, preparation of documents, knowledge of useful plants, domestic animals, politics and religion⁷. Another reformer, Samuel Ormis (1842-1875) explained his view on the system of girls' education in his theoretical works *Výchoveda pre seminaristov a rodičov I. diela* [Science of Education for Seminarists and Teachers, 1st part] and *Učboveda II. diel* [Science of Education, 2nd part] in which he also proposed Latin as a special subject if a student had an intention to study medicine. Active women advocates of female education included Terézia Brunswicková (1775-1861)⁸; Blanka Teleky (1806-1862), Hermína Benická-Verešová (1815-1895)⁹ and Jana Zirzenová (1821-1904). Girls' education was also stressed in the works and

Education as a Requirement and Means for Emancipation], in *Na ceste k modernej žene*, Bratislava, Veda, 2011, pp. 150-151.

⁵ Clark, *Schooling the daughters of Marianne: textbooks and the socialization of girls in modern French primary schools*, cit., p. 5.

⁶ If not stated otherwise, the paper follows current Slovak usage, transcription and spelling of personal and geographical names.

⁷ J. Mátej et al., *Dejiny českej a slovenskej pedagogiky* [History of Czech and Slovak Pedagogy], Bratislava, SPN, 1976, pp. 185-186; D. Votrubová, *Vychovateľské dielo Daniela Lehotského* [Educational Work of Daniel Lehotský], «Jednotná škola», n. 4, 1956, p. 455.

⁸ Terézia Brunswicková is famous for her love affair with Ludwig van Beethoven. Later, she got to know Pestalozzi, a Swiss educator who influenced her opinions about education. She also founded the first industrial school for girls in Budapest.

⁹ Hermína Benická-Verešová initiated the establishment of *Krajinský ženský vzdelávací spolok* [Országos Nőképző Egyesület/ Provincial Women Educational Group] in March 1868 in Lučenec, which supported girls', and female education.

contributions of Mária Daxnerová (1822-1901)¹⁰, Miroslava Marína Hodžová (1842-1921); Elena Maróthy-Šoltéssová (1855-1939) and others¹¹.

2. *Types of schools and content of education*

The earliest information about female and girls' education is scarce due to the reasons mentioned above. We know, for instance, that private schools already existed from the 13th century (e.g. convent schools in Bratislava)¹². The establishment of compulsory school attendance at the elementary level in the form of *General School Order* of 6 December 1774 increased literacy and created the possibility of official education of girls for the first time. Schools were divided into 'trivial', 'main' and 'ordinary'. Trivial schools were established by church institutions and consisted of one grade/ class only and taught the basic skills of reading, writing and counting. Main schools were set up in the district towns and consisted of four grades/ classes. Ordinary schools prepared future teachers of trivial schools. The school reform influenced the Hungarian part of the empire only after 2 August 1777, after *Ratio Educationis* was published and its content was similar to *General School Order*. The act only created a general obligation of schooling and a set system of lower education. Basic/ elementary education was compulsory for girls and boys from six to twelve. The institutes for girls differed according to the social status of the pupils and also defined the content of compulsory education for girls from six to twelve. Article 33 of the *Order* – concerning the girls of townsman and yeoman background – ordered teaching of religion, ethics, interpretation of Gospel, reading Hungarian history in mother tongue, writing, counting, Biblical stories and – depending on social status – instructions for housework. The study of girls from aristocratic families included religion, reading of Hungarian, French and German texts, writing, counting, Biblical stories, the history and geography of Hungary and neighbouring areas and other women's activities suitable for aristocratic girls. Lower social classes learned the basics of reading, writing and counting while the girls from wealthy families had significantly wider opportunities.

The state school system did not institutionalise *state* schooling for girls, which meant that a rich spectrum of private educational institutes existed. State schools for girls appeared only after the 1867 Austro-Hungarian Compromise,

¹⁰ Her contributions were published in Slovak magazines and journals «Dennica», «Slovenský domový kalendár», «Slovenské listy», «Obzor», and «Priateľ dietok». Mária Daxnerová was influenced by a Czech writer Božena Němcová.

¹¹ E. Ďuranová, A. Šuorková, A. Táborecká (edd.), *Lexikón slovenských žien* [Lexicon of Slovak Women], Martin, Matica slovenská, 2003.

¹² J. Drenko, *Dievčenské školy na Slovensku do roku 1918* [Schools for Girls in Slovakia until 1918], «Pedagogická revue», n. 1, 2006, pp. 88-89.

though the situation was due to several reasons more prevalent in the Austrian than in the Hungarian part of the empire. The founders of institutes could be private men, churches, city and town councils and various other associations¹³. Generally speaking, there were three forms of education based on the founder of the institute and also on the social status of pupils: home schooling, educational institutes founded by the church organisations and towns and private institutes.

The most usual form of education for girls from higher social classes – noble families and daughters of rich owners of factories and traders – was home schooling; they attended other types of educational institutes rarely. A teacher came to a family, but the lesson looked like a social interaction since a mother or other family members were frequently present. Home schooling was highly learner-centred and developed the individual skills and talents of a pupil much more than their general knowledge. Private tutors concentrated usually on the formation of artistic skills in literature, music and visual arts. Tutors were often widows who knew languages, students or recent graduates of high schools or universities who lacked proper pedagogical qualification and practice and taught either to earn their living or to pay for their studies. The first theoretical handbook for home schooling and educators was published by Ján Seberíni (1780-1857) *De praecipuis capitibus primae educationis per paedagogos, horumque munere* [On Basic Principles of Elementary Education for Educators and on Their Duties] in 1810. The book was written in Latin and emphasised that girls should learn how to read, write and count and be able to prepare simple written documents. Seberíni's work also stressed the knowledge of biology (particularly the human body), household management and handcrafts¹⁴.

Education provided by religious institutes included the activities of specific orders, denominations and communities and the schools established were of Catholic, Protestant, or Jewish background. To the Catholic orders which established schools belonged the Cistercian Order, the Clarist Order, the Ursuline Order, School Sisters of Notre Dame, the Order of St Vincent, the Order of English Consecrated Virgins and others. These schools had the character of private institutes. For instance, in Bratislava, a school for seventy-five girls connected to the convent was set up by the Ursuline Order as early as 1750.

¹³ In the Slovak region, town schools – established and financed by the town – were in Bratislava, Banská Štiavnica, Bytča, Dobšiná, Hlohovec, Humenné, Kežmarok, Komárno, Kremnica, Krupina, Levice, Levoča, Liptovský Hrádok, Malacky, Martin, Modra, Moravský Ján, Nitra, Nové Zámky, Pezinok, Piešťany, Prešov, Pukanec, Prievidza, Rimavská Sobota, Rožňava, Ružomberok, Skalica, Senica, Stará Turá, Spišská Nová Ves, Stupava, Svätý Jur, Šahy, Trenčín, Veľká Revúca, Zlaté Moravce, Zvolen and Žilina. See M. Potemra, *Školstvo na Slovensku v rokoch 1901-1918* [Education in Slovakia from 1901 to 1918], Martin, Matica Slovenská, 1993, pp. 569-617; J. Drenko, *Dievčenské školy na Slovensku do roku 1918* [Schools for Girls in Slovakia until 1918], «Pedagogická revue», n. 1, 2006, pp. 83-88.

¹⁴ J. Drenko, *Dievčenské školy na Slovensku do roku 1918* [Schools for Girls in Slovakia until 1918], cit., p. 91.

The Ursuline Order also had schools for girls in Trnava, Košice and Modra; the School Sisters of Notre Dame set up an educational institute in Bratislava in 1747¹⁵. The Order of English Consecrated Virgins existed in Slovakia from 1628. Their schools for girls were in Považská Bystrica, Lučenec and Prešov¹⁶. The Sisters of Mercy of St. Borromeo belonged to less well-known religious orders which also focused on education. As far as other denominations are concerned, there were schools founded later, especially at the end of the 19th and beginning of the 20th century.

3. Main institutes of female education in the Slovak Region in the 1850s and 1860s

To get a comprehensive synopsis of the situation in the 1850s and 1860s, specific activities of individuals need to be mentioned. First and foremost, there were people who undertook various enterprises to promote and increase the education of girls and women despite the unfavourable atmosphere in society, which reacted towards the wider education of girls and women in a very negative way.

One of the major advocates of the systematic education of girls was Štefan Moyses (1797-1869), whose activities were possible due to the political changes that followed the 1848 revolution and the activities of the Štúr circle. Štefan Moyses, who was the Roman-Catholic Bishop of the Banská Bystrica Diocese, wanted to establish a secondary school for girls in the late 1850s and early 1860s in Banská Bystrica¹⁷. His plan was to set up a pedagogical institute which would combine religious and national aspects (teaching in the Slovak language) of education that would distinguish it from the traditional convent schools. S.H. Vajanský, in his biography of Moyses, emphasises the significance of the Bishop's attempt and he describes the state of female education in the Slovak

¹⁵ From 1765, the institute was open to the public. For more information on the Notre Dame Order in the 18th century see I. Štibravá, *Výchova a vzdelávanie aristokratiiek na príklade bratislavského kláštora Notre Dame v 18. storočí* [Education of the Aristocratic Girls: a Case Study of the Notre Dame Convent in the 18th century], in *Na ceste k modernej žene*, Bratislava, Veda, 2011, pp. 35-49.

¹⁶ J. Drenko, *Dievčenské školy na Slovensku do roku 1918* [Schools for Girls in Slovakia until 1918], cit., pp. 88-90; *Pedagogická encyklopédia Slovenska 2* [Pedagogical Encyclopaedia of Slovakia 2], Bratislava, Veda, 1985.

¹⁷ Štefan Moyses was one of the major representatives of Slovak cultural life at the time. He was very open-minded and became an authority for Catholics as well as for Protestants. He emphasised the importance of the use of the Slovak language in schools and he significantly reformed education in his diocese. Moyses was also the first chairman of Matica slovenská, a Slovak national cultural institution founded in 1863 in Turiansky Svätý Martin.

region as being in «absolute poverty»¹⁸. Vajanský is also rather critical of the state of girls' schooling when he claims that «private “Erziehungsanstalt” and other types of ‘institutes’ [had been] founded simply to get money from poor parents»¹⁹ and characterises the education that they provide as «empty and superficial»²⁰. However, the institute was not founded, although eventually a convent-girl folk school was set up in Banská Bystrica²¹.

A club that had formerly functioned as a Sunday school and had a significant impact on the spread of female education was set up by Marína Hodžová (1842-1921)²² in the northern part of Slovakia, in Liptovský Mikuláš. The aim of the club, known as *The Women's Association* and founded in 1860, was to provide education and organise it for other girls and women. Slovak books were read and discussed and lectures on Slovak history were included in its programme. Again, a political aspect – raising national Slovak awareness – was obvious in its policy. From 1862 to 1864 Marína Hodžová also led the *Slovenská dievčenská beseda* [Slovak Girls' Organisation], a cultural-educational organisation promoting national awareness, which exceeded the remit of a Sunday school. It existed for three years and educated about 30 girls, mainly from craftsmen's families, who met twice a week for three hours. Hodžová also coordinated and managed women's gatherings in Trnava and Bratislava that focused on reading (Slovak books and magazines), recitations and occasional needlework. Their aim was not to offer and provide qualification for employment but to increase the general cultural awareness of women.

From 1867 an organisation of Protestant women in Liptovský Mikuláš called *Dobrodej* functioned as a 'girls' class as if a separate division of the town school²³. The organisation funded the library and provided the salary for a teacher of needlework who was strictly selected²⁴. Similar organizations that promoted girls' education were established in other towns in the northern

¹⁸ S.H. Vajanský, *Život Štefana Moyses* [The Life of Štefan Moyses], 1897, <http://zlatyfond.sme.sk/dielo/1632/Vajansky_Zivot-Stefana-Moyes/4#ftn.d56e2301> (last access: April 29th, 2012).

¹⁹ *Ibid.*

²⁰ *Ibid.*

²¹ The exact date of the foundation is unknown. A. Kliman, *Náš nezabudnutelný Dr. Štefan Moyses* [Our Unforgettable Dr. Štefan Moyses], Bratislava, Banská Bystrica, 1969, p. 49; L. Franková, *Účasť Štefana Moyses na vývoji školstva v Banskej Bystrici* [Contribution of Štefana Moyses to Education in Banská Bystrica], «Literárnemuzejný letopis», n. 29, 1999, p. 187; P. Kuka, *Moyes a slovenské školstvo* [Moyes and Slovak Education], in *Štefan Moyses 1869-1969. Zborník z vedeckej konferencie* [Conference Proceedings], Martin, Matica slovenská, 1971, p. 110.

²² Hodžová's father was Michal Miloslav Hodža (1811-1870), one of the main representatives of the Slovak National Movement of the 1840s.

²³ M. Madera, *Dobrodej* (1867-1937), «Cirkevné listy», n. 1, 1938, p. 30.

²⁴ «*Dobrodej*» Spolok evanj. Žien v Lipt. Sv. Mikuláši. *Sedemdesiat rokov v službe pánovej 1867-1937* [‘Dobrodej’ Association of Protestant Women in Liptovský Sv. Mikuláš. Seventy Years in the Service for the Lord 1867-1937], Lipt. Sv. Mikuláš, Dobrodej, 1937, p. 2.

region of Slovakia: *Beseda kláštorských Sloveniek* [Organisation of the Convent Slovaks] in Kláštor pod Znievom²⁵; *Lýra* [Lyre] and *Ženský spevácky spolok* [Female Singing Group] in Dolný Kubín (approximately 1871-1873); *Vesna* in Liptovský Trnovec²⁶; and *Ženská beseda* [Female Organisation] in Martin²⁷. Such groups were also founded in other parts of the country. They were closely connected with the nationalist movement and often helped prepare nationalist events and gatherings (decoration, refreshments, cultural programmes etc.) thanks to which they received books and were provided with lecturers²⁸.

Ludmila Kuorková (1845-1884) tried to establish a Slovak school for girls in Martin, the then centre of Slovak national life. Kuorková was self-educated and since the school inspectors had allowed her to take the exam at *preparandium* (teachers' academy) in Kláštor pod Znievom, she became one of the first qualified female teachers in Slovakia. Her qualification enabled her to work in public and also in state schools. Her interests centered on practical subjects and she set up a highly practical school of knitting and handcrafts in 1862²⁹ although it did not last for long. Despite her disappointment, Kuorková came up with another initiative and she established and led a private school for girls in Martin (1866-1872) attended by some sixty girls³⁰. The school had three classes and focused on catechism, the Bible, German and Slovak grammar, counting and handwriting. In her *Prehľad náukových predmetov* [Overview of Subjects] Kuorková described the content of the *curricula* which she had prepared: «The pupils in the first class learn how to read, write, think, pray. Universal Christian faith, something from the Biblical stories, the basics of counting, nursery rhymes and fairy tales»³¹. Kuorková obviously did not free

²⁵ Its existence is mentioned in the list of the subscribers of the magazine «Junoš» in 1865/66.

²⁶ *Vesna* is mentioned by Hana Gregorová in her work *Slovenka pri krbe a knihe* [Slovak Woman at Fireplace with a Book], 1929, p. 108.

²⁷ The overview of educational groups can be found in E. Kačírek, *Vnímanie emancipácie žien v slovenskej spoločnosti v 60. a 70. rokoch 19. storočia* [Female Emancipation in Slovak Society in the 1860s and 1870s] in J. Darulová, K. Košťalová, *Sféry ženy, Sociológia, etnológia, história*, Banská Bystrica, Faculty of Humanities of the Matej Bel University and Sociological Institute of the Czech Academy of Sciences, 2004, pp. 391-401.

²⁸ D. Kodajová, *Vzdelávanie dievčat na Slovensku a prvé učiteľky* [Education of Girls in Slovakia and the First Teachers], in V. Michalička (ed.), *Dejiny školstva a pedagogiky na Slovensku koncom 19. a začiatkom 20. storočia*, Bratislava, Ústav informácií a prognóz školstva, 2008, p. 125.

²⁹ Schools of handcrafts and the courses for seamstresses were immensely popular. Being a seamstress offered a fast and the most practical way to become independent.

³⁰ M. Nižňanská, *Pohnutý život Ludmily Kuorkovej* [The Unsettled Life of Eudmila Kuorková] «Historická revue», n. 9, 1997, pp. 22-23; E. Ďuranová, A. Šuorková, A. Táborecká (edd.), *Lexikón slovenských žien* [Lexicon of Slovak Women], Martin, Matica slovenská, 2003, pp. 138-139; D. Kodajová, *Vzdelanie dievčat. Možnosti a limity uplatnenia* [The Education of Girls. Possibilities and Limits of Employment], in K. Čadková, M. Lenderová, J. Stráňníková (edd.), *Dejiny žien aneb Evropská žena od středověku do poloviny 20. století v zajištění historiografie*, Pardubice, Univerzita Pardubice, 2006, p. 296.

³¹ D. Kodajová, *Vyššie vzdelávanie dievčat na Slovensku v 19. storočí* [The Higher Education

herself from the traditional concept that a woman should first take care of her household³². After leaving Martin in 1872, Kuorková continued to work as a teacher in the Turiec region. She stopped working as a teacher in 1876, when she was dismissed.

In the 1860s, a few private institutes for girls existed in what is today Slovakia but differed a lot in quality³³. Female interns of the private educational institutes had been taught foreign languages (mostly German and Hungarian, sometimes French), religion and ethics, drawing, music, singing, dancing and to a lesser extent also history, church history and geography, and its main purpose was to use the acquired knowledge in social interaction. Such schools included the private institute of Mária Braunsteinová in Nitra, the institute of Miss Fábryová (nee Turčániová) in Rimavská Sobota³⁴, later transformed into a higher institute for girls and then into a girls' town school. At the private school of Karol Orfanides³⁵ in Banská Bystrica³⁶ Hungarian as well as the Slovak language were used in teaching. One of the most well-known girls' institutes in the Slovak region was the higher girls' institute of Matej Sennovitz founded in 1784 in Prešov, later connected with the halls of residence³⁷. The subjects, besides the traditional ones, included natural science, psychology, exercises in handwriting and special exercises to train the memory. In Bratislava, there was the Institute of Kristína Le Brun which accepted girls from 12 to 14 and also offered scholarships. In Bratislava, there were also private art schools, one of them led by the painter Juraj Fleischmann. In Levoča, there was the educational institute for girls of Karolína Cserneyová founded in 1886. In Lučenec there were a few schools for girls, for instance the private institute for girls of Johanna Ungarová, established in 1873 where girls were taught the Hungarian,

of Girls in Slovakia in the 19th century], <<http://www.saske.sk/cas/archiv/4-2006/index.html>> (last access: April 29th, 2012).

³² Kodajová, *Vzdelávanie dievčat na Slovensku a prvé učiteľky* [Education of Girls in Slovakia and the First Teachers], cit., p. 125. More information and material related to the school can be obtained at the Slovak National Library in Martin.

³³ See, for instance, a satirical short story published in *Orol*, 3, 1872, p. 107.

³⁴ Slovak Realist writer and journalist Terézia Medvecká-Vansová (1857-1942) spent a year there. Medvecká-Vansová is one of the most important representatives of the emancipation of Slovak women. From 1898 she was the first editor of the first women's magazine «Dennica» *Ženský list pre poučenie a zábavu* [«Dennica» 'Women's Letter for Education and Entertainment']. Terézia Medvecká-Vansová was also a vice-president of the Slovak women organisation Živena.

³⁵ The school was well known for its excellent music (piano) education. Already mentioned Slovak writer Terézia Medvecká-Vansová, an educator Elena Paulíny-Tóthová-Štefanovičová (1862-1950) and Božena Slančíková-Timrava (1867-1951) attended the school. Sources for the history of the school are in the Banská Bystrica archive.

³⁶ Kodajová, *Vyššie vzdelávanie dievčat na Slovensku v 19. storočí* [The Higher Education of Girls in Slovakia in the 19th century], cit.

³⁷ J. Drenko, *Cirkevné dievčenské školy – pramene a archívne dokumenty* [Church Schools for Girls – Sources and Archive Documents], in *Pedagogický výskum na Slovensku v Európskom kontexte* [Pedagogical Research in Slovakia in European Context], Trnava, Univerzita sv.Cyrila a Metoda, 2004, p. 76.

German, French and Italian languages and handcrafts; they also had piano lessons and sewing. In Košice, there were also several educational facilities; the most well-known was the school of Gabriela Hubnerová. Private schools also existed in Liptovský Mikuláš, Bardejov, Rožňava, Spišská Nová Ves, Zvolen and Žilina³⁸. As far as higher private education for girls was concerned, there were 86 schools in Hungary in 1867 out of which 13 existed in what is today Slovakia. There were eight schools in Bratislava, two in Trnava and in Košice, and one in Zvolen³⁹.

4. *Female education and the Hungarian School Act of 28 May 1868*

The Hungarian School Act No. 38 from 1868 was an important landmark in female education in the second half of the 19th century. Dealing with primary education at folk schools, town schools and teachers' institutes, the act was valid in all countries incorporated into the Hungarian Kingdom⁴⁰, i.e. Slovakia, a part of Serbia, Croatia, Slovenia, Romania, Poland and Carpathian Ruthenia. Compulsory school attendance lasted six years. The first article of the act specified compulsory attendance for girls from six to 12/15; the second article stated that physically and mentally handicapped children did not have to attend school. Articles 4 and 5 indicated the sanctions and fines in case a child did not attend school. If a child's absence continued, a guardian was responsible to ensure attendance⁴¹.

The act divided schools into primary folk schools, higher folk schools, town schools and pedagogical schools; another division was into state and private schools. The founder of the school selected teachers; established their salaries and provided the school with study material⁴².

³⁸ M. Potemra, *Školstvo na Slovensku v rokoch 1901-1918* [Education in Slovakia from 1901 to 1918], Košice, Štátna vedecká knižnica, 1990, p. 4.

³⁹ Drenko, *Dievčenské školy na Slovensku do roku 1918* [Schools for Girls in Slovakia until 1918], cit., pp. 80-96.

⁴⁰ Primary education in Austria, the Czech region and Halič was based on the Reich Act from 1869. According to this Act, Austria introduced compulsory attendance lasting eight years. The Act was of European significance as, for instance, Great Britain passed a law about compulsory school attendance in 1870. Mátej et al., *Dejiny českej a slovenskej pedagogiky* [History of Czech and Slovak Pedagogy], cit., p. 282.

⁴¹ M. Dezsó (ed.), *Corpus iuris Hungarici: Magyar Törvénytár 1836-1868. Évi Törvényczikkek* [Hungarian Laws 1836-1868. Legal Acts], Budapest, Franklin-Társulat, 1896, pp. 449-50.

⁴² K. Hollý, *Ženská emancipácia* [Women's Emancipation], Bratislava, Veda, 2011, p. 13. On the fight for co-education see S. Zimmermann, *Die bessere Hälfte? Frauenbewegungen und Frauenbestrebungen in Ungarn und Habsburg Monarchie 1848 bis 1918* [The Better Half? Women's Movements and Women's Movements in Hungary and the Habsburg Monarchy 1848-1918], Wien, Promedia, 1999.

According to the act, the first level of education was obtained at elementary folk schools; they consisted of six compulsory classes/ grades for children from six to 12. An exception was allowed if a pupil continued to study at a higher institute after finishing the fourth year of elementary folk school. In that case, however, the pupil had to stay there at least for two years so that the requirement of a six-year compulsory school attendance was met (Article 49)⁴³. The number of lessons differed according to the term: there were five lessons per day in the winter term and two lessons a day during the summer term. Altogether, pupils had about 20/25 lessons per week, alongside lessons in ethics and religion, physical education, agricultural activities and gardening, which were not included in that number (Article 52). The school year lasted at least eight months in the country, in bigger towns at least for nine months (Article 54). The act (Article 55) also specified which subjects should be taught. The list included religion and ethics, writing and reading, regional geography and history, world geography and history, natural science focusing on regional specifics, practical agricultural and gardening activities, civic education and singing. The maximum number of pupils per teacher was 80⁴⁴.

The act also defined education for boys and girls (Article 64) at higher folk schools⁴⁵. Towns that had more than 5,000 inhabitants had an obligation to establish such a school; if the distance was less than half a mile between towns they could have a common school. Boys and girls were admitted according to their results from the sixth year of folk school or according to the entrance exams. The number of lessons per week ranged between 18 and 24, while a teacher could not teach more than thirty lessons weekly⁴⁶. Article 65 stated that there had to be at least two teachers and an assistant at each school.

The content of education was gender-related and similar to the previous type of school⁴⁷, where boys and girls were educated separately. Girls did not study the basics of agriculture, national law, basics of accounting, history nor physical education and focused on gardening and housework instead. Boys, on the other hand, did not have handcrafts; their lessons in natural science concentrated on agriculture and industry; and history was divided into national and general. As far as mathematics was concerned, girls studied arithmetic only; boys also had geometry and practical exercises. Courses such as religion, handwriting, drawing, singing and Slovak/ Hungarian language (depending on the mother tongue) were for both sexes⁴⁸.

⁴³ After elementary school, pupils might continue their education at so called 'repetitive' schools founded by small towns.

⁴⁴ Act No. 38 from 1868 about education at national schools.

⁴⁵ They were also called 'continual schools' as pupils continued their studies there after elementary schools.

⁴⁶ Act No. 38 from 1868 about education at national schools, Articles 59-60; 63; 66.

⁴⁷ If conditions allowed, girls and boys had to be taught in separate rooms, also at folk schools (Article 29).

⁴⁸ K. Hollý, *Ženská emancipácia* [Women's Emancipation], Bratislava, Veda, 2011, p. 13,

At the town schools girls and boys were still taught separately (Article 71); girls attended school for four years, boys for six. Pupils were admitted after finishing the fourth class of elementary school or after they passed the entrance exams (Article 69). Article 72 stated that there had to be at least three teachers and one assistant at each town school. The number of lessons ranged from 24 to 26 per week⁴⁹. While the school *curricula* were universal (i.e. not gender-related) (as stated in Article 74), the Minister of Education could select alternative courses for girls (Article 78)⁵⁰. The subjects studied were religion, counting, geometry, geography-history, natural science, chemistry, agriculture, statistics, the basics of law, accounting, singing, drawing and physical education. Special courses included music, Latin, French and another foreign language.

5. Female education in the 1870s

Despite the fact that the law permitted towns to set up town schools for girls, the Ministry of Culture found the results highly unsatisfactory. Also for that reason, an amendment to the act was issued in 1874 which directly ordered the establishment of town schools⁵¹ where girls could study for four years, which meant that finishing the school a girl completed her eight-year attendance.

The 1874 Amendment also introduced so called higher state schools; they admitted girls who were at least ten years old and had finished a four-year course at folk school. These schools appeared especially after 1877. The higher state schools offered a six-year course, extended to eight years from 1893. The first school of this type with six years was set up in Budapest in 1875. Similar schools also spread in the Slovak region: Trenčín (1877), Levoča (1879), Banská Bystrica and Bratislava (1883) and Košice (1892). The courses included the study of languages (Hungarian – which was a teaching language – German and French), literature, history, natural science, mathematics, geography, the study of nature, chemistry (for housework), civic education, drawing, singing and handicrafts. Special subjects were English and sketching. The school usually had a dormitory, study room, flats for teachers, a school canteen, doctor's surgery, a chapel and other rooms used for various purposes⁵². While higher state schools offered general education similar to the grammar school for boys, they were not

note n. 31.

⁴⁹ Act N. 30 of 1868 about education at national schools.

⁵⁰ Holly, *Ženská emancipácia*, cit., p. 14.

⁵¹ The town schools were known as '*mešťianky*' and state schools for girls as '*polgárky*' in Slovak. The plural form derived from Hungarian *polgári* (school) and was used as a diminutive.

⁵² D. Kodajová, *Odborné vzdelávanie ako predpoklad a prostriedok emancipácie* [Technical Education as a Requirement and Means for Emancipation], in *Na ceste k modernej žene*, Bratislava, Veda, 2011, pp. 153-154.

equivalent to grammar schools. For instance the final exam (*maturita*) could not be taken at a higher state school and if girls wanted to pass the exam, they could do so at the grammar school for boys only.

The 1870s were also associated with the first grammar school-type institutes. *Cirkevnonárodný dievčenský vychovávacie ústav* [Church-National Educational Institute for Girls] in Veľká Revúca offered a three-year course for girls aged from 10 to 14. The father of the school was Samuel Ormis (1824-1875)⁵³, a professor at the grammar school for boys, and others participating on the project were Ľudovít Greiner, Ján Fakla, August Horislav Škultéty and Andrej Tóth. The school was run by Július Botto and his sister Helena (she taught handcrafts), and later by a couple called Pepich. Teachers came from the grammar school for boys and the timetable consisted of six alternating lessons of handcrafts and special subjects per day. During the needlework lessons (embroidery, crocheting and sewing), students practised their Hungarian in the morning and German in the afternoon; special subjects also included piano and French lessons⁵⁴. Although information about the school and its programme was published in Slovak newspapers, the school had only six students – one of them was Marína Ormis, the daughter of Samuel Ormis – and it existed only until 1874⁵⁵. Similar disappointment was met by another project for girls in Revúca, proposed by Ľudovít Reuss (1822-1905), who expected that the institute – with the function of a higher continual school – would be public, established by the town and would be an extension of the existing Ormis' school. Its organisers used the act of 1874, which ordered the establishment of higher schools for girls in bigger towns, as an argument for its opening. Both schools in Revúca taught religion, Slovak, Hungarian and German languages, mathematics, geography, biology, physics and the basics of medicine, handwriting and drawing, singing and needlework. Older girls had French, Latin and piano lessons but these

⁵³ Samuel Ormis was a Protestant clergyman, a teacher and educator whose pedagogical ideas were influenced by J.A. Komenský and the Štúr generation. Ormis was also the author of several course books and textbooks, for example *Zemepis malý pre žiakov a žiačky* [Geography in Short for Boys and Girls] (1850); *Stručný prírodopis pre žiakov a žiačky* [A Short Overview of Natural Science for Boys and Girls] (1851), see Mátej *et al.*, *Dejiny českej a slovenskej pedagogiky* [History of Czech and Slovak Pedagogy], cit., pp. 310-311.

⁵⁴ E. Kačírek, *Vnímanie emancipácie žien v slovenskej spoločnosti v 60. a 70. rokoch 19. storočia* [Female Emancipation in Slovak Society in the 1860s and 1870s] in J. Darulová, K. Košťalová, *Sféry ženy, Sociológia, etnológia, história*, Banská Bystrica, Faculty of Humanities of the Matej Bel University and Sociological Institute of the Czech Academy of Sciences, 2004, pp. 391-401. Special analysis and evaluation of the school can be found in J. Maliak, *Domácnosť a škola* [Home and School], 1913, [s.n.], pp. 8-10; J. Gallo, *Revúcke gymnázium (1862-1874)* [Grammar School in Revúca (1862-1874)], Bratislava, Obzor, 1969, pp. 70-73; D. Kodajová, *Vzdelávanie dievčat na Slovensku a prvé učiteľky* [Education of Girls in Slovakia and First Teachers], cit., p. 126.

⁵⁵ J. Drenko, *Dievčenské školy na Slovensku do roku 1918* [Schools for Girls in Slovakia until 1918], «Pedagogická revue», n. 1, 2006, p. 94.; J. Gallo, *Revúcke gymnázium (1862-1874)* [Grammar School in Revúca (1862-1874)], cit., pp. 70-71.

were voluntary and paid⁵⁶. Both projects in Revúca played a significant role in the education of Slovak girls since the students were prepared not only for traditional roles of wives and mothers but also for professions requiring special preparation, such as office work, jobs at primary and higher schools and in the health services. Particular courses were justified pragmatically, e.g. Latin was needed on the basis of a possibility of the university study of medicine; handwriting was essential for office work.

The women's group *Živena*⁵⁷, founded in 1869, also contributed to the increase and promotion of women's education. One of its main aims mentioned in its statutes was providing women's education equal to that of men. As *Živena*'s attempts to establish a grammar school for girls failed, they decided to focus instead on permission to establish a school of 'household' type (1879 and 1884) and an economics school (1899 and 1910). Even though they tried repeatedly, their efforts were declined⁵⁸.

The 1883 Act No. 30 divided secondary schools into grammar schools, which prepared students for university study, and so called 'real' schools. The *maturita* (final exam) certificate from grammar school enabled students to apply for any university whereas students graduating from 'real' schools could continue in mining, forestry and economic academies or at technical universities, which accentuated mathematics or natural science⁵⁹. The first grammar school for girls in Hungary was set up in 1896 in Budapest. Studies originally took six years, extended to eight years from 1899. It needs to be stressed that girls were not allowed to take the final exam (*maturita*) there; until the beginning of the 20th century this was possible only at boys' grammar schools.

This development of the school system formed the basis for opening the universities to women in the late 1890s, since women could apply to university in Hungary only after 1895, in Austria even later, from 1897. Before that, Slovak women could only study or receive a university degree at foreign universities⁶⁰.

⁵⁶ While 'traditional' female schooling (French, piano and needlework) was criticised, it was still very popular and practised.

⁵⁷ Its name was derived from the name of the Slavic goddess of life and energy.

⁵⁸ Kodajová, *Vzdelávanie dievčat na Slovensku a prvé učiteľky*, cit., p. 126; Z. Pástor, *Živena a jej školstvo* [Živena and Education], in V. Sedláková (ed.), *Zborník osláv 125. výročia Živeny spolku slovenských žien*, Martin, Živena, 1995, pp. 129-136.

⁵⁹ Z. Fekete, *Vývoj školstva koncom 19 a začiatkom 20. storočia v Maďarsku* [History of Education at the end of the 19th and beginning of the 20th Century in Hungary], in Michalička (ed.), *Dejiny školstva a pedagogiky na Slovensku koncom 19. a začiatkom 20. storočia*, cit., p. 25.

⁶⁰ J. Darulová, K. Košťalová (edd.), *Sféry ženy, Sociológia, etnológia, história* [Spheres of Women, Sociology, Ethnology, History], Banská Bystrica, Faculty of Humanities of the Matej Bel University and Sociological Institute of the Czech Academy of Sciences, 2004, pp. 377-390. Dezsó (ed.), *Corpus iuris Hungarici: Magyar Törvénytar 1836-1868. Évi Törvényzikkék*, cit., pp. 449-69. See also: K. Agyné-Szegvári, *Út a nők egyenjogúságához* [Way towards Women's Equality], Budapest, Kossuth, 1981.

6. Female pedagogical (teacher training) institutes

Education of future teachers was provided by so called 'normal' schools that offered special courses lasting several months. In the Slovak region, such courses were organised in Banská Bystrica, Bratislava, Zvolen, Košice and Trnava. This effort was followed by the establishment of church institutes for teachers (*preparandium*, pl. *preparandia*) where studies took two years. The first female pedagogical institute with German as a teaching language was established by the Order of English Consecrated Virgins in Budapest in 1856. In the Slovak region, the Roman Catholic Bishop I. Fábry and the Ursuline Order initiated the establishment of the Roman Catholic Female Teacher Institute on 1 October 1860 in Košice. The institute had two years and from the school year 1869/70 studies there lasted for three years⁶¹.

Act No. 38 from 1868 included for the first time articles about specialised pedagogical training for women and ordered ten pedagogical institutes for women be established in Hungary. The institutes educated girls who were older than 14 and who finished higher folk school (Article 108). The length of study was three years (Articles 87 and 109) and four years from 1883; the content of education was gender-based (see Articles 88 and 111).

The programme for future female teachers contained needlework, gardening and singing. Subjects for girls included mother tongue and grammar, Hungarian and German languages, geography-history, pedagogy, mathematics, the principles of management and housekeeping (Article 111). The number of students was specified and set by the government. Students lived in a housing facility and they had free accommodation and linen but paid for their meals, although poor girls with excellent study results had their meals paid by the state (Article 113). Besides compulsory continual exams, there were also final public exams in all subjects at the end of the school year and in the last year of study. If a graduate wanted to receive a diploma, an exam from pedagogical practice⁶² had to be taken.

The first state pedagogical institute was founded in Budín in 1869, led by Jana Zirzenová. Other institutes were set up in Cluj (1870, today's Romania);

⁶¹ I. Kominarec, *Rímsko-katolícke učiteľské ústavy v Košiciach* [Roman Catholic Teacher Training Schools in Košice], in Michalička (ed.), *Dejiny školstva a pedagogiky na Slovensku koncom 19. a začiatkom 20. storočia*, cit., pp. 68-76; V. Michalička, D. Vaněková, E. Zacharová, *Dejiny najstarších učiteľských ústavov na Slovensku* [Early History of Teacher-Training Institutes in Slovakia], Bratislava, ÚIPŠ, 2002, p. 9. Documents related to the institute can be found in the State Archive in Košice.

⁶² Teaching practice for girls was done in girls' classes of a selected school. M. Potemra, *Školstvo na Slovensku v rokoch 1901-1918* [Education in Slovakia from 1901 to 1918], Košice, Štátna vedecká knižnica, 1990, p. 515; Dezsó (ed.), *Corpus iuris Hungarici: Magyar Törvénytár 1836-1868. Évi Törvényczikke*, cit., pp. 462-465; J. Drenko, *Dievčenské školy na Slovensku do roku 1918* [Schools for Girls in Slovakia until 1918], «Pedagogická revue», n. 1, 2006, pp. 82-83. Act No. 30 of 1868 about education at national schools.

Subotica (1871, today's Serbia) and Győr (1875, today's Hungary)⁶³. There were 61 pedagogical institutes in Hungary in 1872, two of them in the Slovak region (in Bratislava and Košice)⁶⁴. The following institutes focused specifically on the training of female teachers for girls' schools in the Slovak region: the Roman Catholic Female Pedagogical Institute in Košice (founded in 1868), the State Female Pedagogical Institute in Bratislava (founded in 1871), and the Female Pedagogical Institute in Prešov, with Hungarian as a teaching language (founded in 1899). The Girls' Pedagogical Institute was founded in Levoča in 1879 and Female Pedagogical Institute of the Ursuline Sisters in Trnava in 1893. The teaching language at these institutes was Hungarian and their aim was to prepare future teachers for Hungarian education⁶⁵.

Even though there was no act that ordered celibacy for female teachers, it was required and accepted in practice. A married woman was expected to leave her job and stay at home. Interestingly, despite the fact that there were limited work opportunities for the recent female graduates of pedagogical institutes, the profession remained attractive and popular for many girls⁶⁶.

Conclusion

Female education – its content and scope – reflected social, cultural and political views according to which a woman belonged to her husband and children and an educated woman was an anomaly that defied all common laws. The opponents of female education regarded women's efforts as 'sins' because they rebelled against their natural roles of wives and mothers, and educated women were simply not feminine enough. It was also very common to presume that an educated and employed woman neglected her household⁶⁷.

⁶³ Z. Fekete, *Vývoj školstva koncom 19 a začiatkom 20. storočia v Maďarsku* [History of Education at the end of the 19th and beginning of the 20th Century in Hungary], in Michalička (ed.), *Dejiny školstva a pedagogiky na Slovensku koncom 19. a začiatkom 20. storočia*, cit., p. 26.

⁶⁴ Michalička, Vaněková, Zacharová, *Dejiny najstarších učiteľských ústavov na Slovensku* [Early History of Teacher-Training Institutes in Slovakia], cit., pp. 9-10.

⁶⁵ Kodajová, *Vzdelávanie dievčat na Slovensku a prvé učiteľky* [Education of Girls in Slovakia and the First Teachers], cit., p. 128; V. Michalička, D. Vaněková, E. Zacharová, *Dejiny najstarších učiteľských ústavov na Slovensku – výskyt školských pamiatok* [Early History of Teacher-Training Institutes in Slovakia – Educational Sights], «Pamiatky a múzeá», n. 3, 2002, pp. 3-7.

⁶⁶ D. Kodajová, *Profesia učiteľky a vzdelávanie dievčat na Slovensku* [Teacher's Profession and Education of Girls in Slovakia], in G. Dudeková et al., *Na ceste k modernej žene. Kapitoly z dejín rodových vzťahov na Slovensku* [Towards the Modern Woman. Chapters on Gender History in Slovakia], Bratislava, Veda, 2011, pp. 541-563.

⁶⁷ G. Dudeková, *Diskurz o poslaní vzdelaných žien pred a po roku 1918* [Discourse on the Role of Educated Women before and after 1918], in Dudeková et al., *Na ceste k modernej žene. Kapitoly z dejín rodových vzťahov na Slovensku* [Towards the Modern Woman. Chapters on Gender History in Slovakia], cit., pp. 105-106.

These notions also resulted in the study programmes for women focusing on handicrafts, household management and other practical skills and significant changes in the content and scale of women's education can be observed only after the 1840s.

Female education in the Slovak-speaking areas of Hungary in the 19th century was based on and influenced by the individual attempts of its supporters, both men and women (K. Orfanides, S. Ormis, L. Kuorková), who promoted female education at all levels; yet their efforts often failed or were unsuccessful either due to the lack of interest or simply because of a hostile political atmosphere that did not welcome Slovak projects and activities. While it may seem paradoxical, the Catholic Church was among the most significant authorities to establish private educational institutes for women. Female orders spread education, which at the beginning aimed at higher, aristocratic classes, and later became more mainstream-centred. The legislative attempts of Hungarian governments in the second half of the 19th century led to a wider spread of state schools for girls and contributed to significant progress in female education. First, there were separate schools for girls; from the 1890s co-educative secondary schools appeared. The Hungarian state focused on specific school politics with a basic aim of language homogeneity, and for non-Hungarian nationalities it was difficult to see an increase in the number of schools, which promoted Hungarian education *per se*. It is important to point out that until the formation of Czechoslovakia in 1918 there was no school with Slovak as a teaching language.

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The classical studies secondary school and the construction of national identity in post-unitary Italy

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ABSTRACT: The author traces the origins of classical education in the Italian school system, underlining the continuity with Piedmont and Sardinian legislation marked by the Casati Law of 1859. Starting from this data, the author describes the case study of the «Luigi Galvani liceo classico» in Bologna through the investigation of the local documentation available on its curriculum and textbooks. It demonstrates all the difficulties of the initial start-up phase of the post-unitary *liceo classico* among the new cultural and educational phenomena and the persistence of traditional ones, with its difficult and ambiguous establishment that relates also to the little known initial phases of the construction of the national identity, also in the field of classical education.

EET/TEE KEYWORDS: History of Education; Secondary Education; Educational Legislation; Nationalization; Cultural identity; Italy; 20th century

1. *The liceo classico, secondary school specialising in classical studies, under the Casati Law*

«We have had more snow, and much of it, falling on the 11th, 12th and 15th of this month. The roads are full of it, making Carnival rather unpleasant»¹. These are the words of Enrico Bottrigari in his *Cronaca di Bologna* of 1860, remarking on the abundant and insistent snow that framed the frenetic events of those months between 12 June 1859 and March 1860 and in particular those days in February of 150 years ago.

¹ E. Bottrigari, *Cronaca di Bologna*, edited by A. Berselli, Bologna, Zanichelli, 1961, Vol. III: (1860-1867), p. 16.

It was precisely on 12 February 1860 that the Governor of the Provinces of Emilia, Luigi Carlo Farini, issued a decree establishing the teaching of philosophy and literature in the form of *licei*, secondary schools for classical studies, at least one built in every province, «in line with Sardinian Laws»². This was just one of the bricks that, from 13 November 1859 onwards, built the long, tiring and highly complicated 'road' marking the progressive and complicated extension of the Casati Law to the Kingdom of Italy. The law was proposed by Count Gabrio Casati on 13 November 1859 and issued by Vittorio Emanuele II, King of Piedmont and Sardinia while holding full powers, the underlying reason for the second war of independence that was unfolding at the same time. It laid the foundations of the school system not only in Piedmont and Sardinia but also Lombardy, by effect of the immediate annexing of Lombardy to the Kingdom of Piedmont³. The events of the war of independence led to the appointment, on 9 November 1859, of Luigi Carlo Farini as Governor of Romagna, and from 1 January 1860 Governor of the Royal Provinces of Emilia⁴. Farini led the legislative unification of Emilia with a kind of «decree-mania»⁵ that was also to affect the school sector, although with some obscure elements, such as Title V concerning elementary schools, which was not fully promulgated⁶. Moreover, as reported by G. Talamo, the Casati Law was not officially extended to the whole Italian territory, and neither to the provinces of Emilia, and was rather gradually applied not only in the months but also the decades following the Unity of Italy, as also shown in the school legislation of the second half of the 19th century⁷, a sign of the difficulties of the new Italian State, the persistence of local traditions and the tormented relationship between the 'centre and the outskirts' of the Kingdom.

² *Raccolta degli atti governativi pubblicati nelle Provincie delle Romagne e dell'Emilia. Dal 12 giugno 1859 al 18 marzo 1860*, Bologna, Lorenzo Recchioni editore, 1860, pp. 625-626; concerning this decree see again Bottrigari, *Cronaca di Bologna*, cit., p. 18.

³ There are many references in literature to the Casati Law. Here I will quote only a few essential bibliographical references, including the monograph *I problemi della pedagogia*, act V, January-February 1959 with the contributions of Dina Bertoni Jovine, Mario Rumi and Iclea Picco; G. Inzerillo, *Storia della politica scolastica in Italia. Da Casati a Gentile*, Roma, Editori Riuniti, 1974 (with the text of the Casati Law); M.C. Morandini, *Scuola e nazione. Maestri e istruzione popolare nella costruzione dello Stato unitario (1848-1861)*, Milano, Vita e Pensiero, 2003 on the complex genesis within the Kingdom of Sardinia.

⁴ I. Zanni Rosiello, *L'unificazione politica e amministrativa nelle 'provincie dell'Emilia' (1859-60)*, Milano, Giuffrè, 1965, particularly p. 156 and pp. 162-163.

⁵ *Ibid.*, p. 179.

⁶ *Raccolta degli atti governativi pubblicati nelle Provincie delle Romagne e dell'Emilia. Dal 12 giugno 1859 al 18 marzo 1860*, cit.; on these passages see M. D'Ascenzo, *La scuola elementare in età liberale. Il caso Bologna 1859-1911*, Bologna, Clueb, 1997, particularly pp. 58 and following.

⁷ *Nuovo Codice della istruzione pubblica. Raccolta delle leggi, decreti, regolamenti, circolari, istruzioni e decisioni ministeriali vigenti nel regno d'Italia sull'ordinamento della istruzione pubblica e sull'istruzione normale, secondaria classica e tecnica ed elementare con annotazioni e raffronti approvata dal ministero della Istruzione pubblica*, Saluzzo, Tipografia Fratelli Lobetti-Bodoni, 1870, pp. 3-5; *Vicende legislative della pubblica istruzione in Italia dall'anno 1859 al*

Law No. 3725 of 13/11/1859, known as the Casati Law, encompassed five Titles and a total number of 380 articles. The first Title tackled the issue of the central and peripheral administration of schools, marking right from the outset the construction of a strongly oligarchic and bureaucratic pyramid system, lacking in any collegiate approach, along the lines of the choices made previously in Piedmont in the last decade prior to Unity.

The second Title covered higher education, universities, establishing the seats and five faculties of Literature, Philosophy, Sciences, Theology and Law, indicating in the entrance exam the criteria for access, excluded for auditors, the quantitative phenomenon of which still has to be studied.

The fourth Title concerned technical education, defined in a three-year Technical School run by the Municipality and a three-year Technical Institute run by the State and the Province, offering no access to university, as well as a «Normal School» for teacher training, included in Title V of the Casati Law.

The third Title of the Casati Law governed classical secondary education. This (from article 188 to 271) was clearly intended as a path leading to university, as it had the task of «training young people in those studies through which a literary and philosophical culture is acquired that paves the way for special studies leading to the achievement of academic levels in the State Universities». It was divided into two levels, assigned to separate buildings:

- the five-year *ginnasio*, studying Italian language, Latin, Greek, literature, arithmetic, geography, history and notions of Latin and Greek antiquity;
- the *liceo*, with philosophy, elements of mathematics, physics and elements of chemistry, Italian literature, Latin literature, Greek literature, history and natural history.

The *ginnasi* were divided into three classes according to the population of the municipality, and were funded by the municipalities (with the exception of the Royal municipalities). The *licei* on the other hand were established one in each province, divided into three categories according to the population (40,000, 20,000, others), funded by the State with the exception of the non-scientific materials. The professors were divided into full («titolari») and deputy («reggenti»), and it was established that in the *ginnasi* three out of the five professors could be regular, while in the *licei* only four out of seven could hold the position of ‘full’.

The professors were recruited by competition, or so the law said, but in the first years after Unity this didn't actually happen because there were very few professors, particularly non-clerical ones, and it was far easier to recruit staff according to their reputation.

In chapter IV of Title II the law established an entrance and final examination for each class, at both *ginnasio* and *liceo*, with a further school leaving certificate for both. The described certificate was valid for entry to University or entitled them to apply for positions for which a classical studies diploma was required. These examinations were also open to those who had not attended the same *ginnasi* and *licei*, thus those who came from private, paternal education ('homeschooling', as it is known today), with a tutor – or other institutes.

There were also other filters to access the classical secondary school: fees. These were for entry to both the *ginnasio* and the *liceo*, then each year a subscription tax and finally, another fee for sitting the school leaving examination, doubled for students from private rather than public institutes (art. 228). Not wrongly, historiography still considers the Casati Law to be the expression of a 'closed' school system, established to ensure that only a small number of students – destined to form the future ruling class – could enter university, through the filtering mechanism of the fees, exams and 'cul-de-sac' system of teacher training schools and technical schools⁸. To tell the truth, from 1860 the Mamiani Regulation introduced a division of the Technical Institutes into four sections (commercial, agriculture, chemistry and physics-mathematics), opening a small window to university for those from the physics and mathematics section to the Faculty of Mathematical, Physical and Natural Sciences⁹, and this was the road taken by Augusto Righi and Maria Montessori to obtain a place at University. The original Casati Law, however, was defined a «closed» school system. Only the debates of the following decades, an echo of the 'bottom up' demand for education due to the slow modernisation of the country and the growth of the nation and its economic, social and cultural system, forced the ruling classes to open passages towards the 'top' of the school pyramid, towards university, then returning – as Gentile himself said – to the original spirit of the Casati law, re-read in a selective key, the result of the same anachronistic, classicist and aristocratic concept of school and society¹⁰.

⁸ M. Barbagli, *Disoccupazione intellettuale e sistema scolastico in Italia (1859-1973)*, Bologna, il Mulino, 1974.

⁹ *Regolamento per le Scuole tecniche e gli Istituti tecnici, approvato con R. Decreto (N. 4315) 19 settembre 1860*, in *Codice dell'istruzione secondaria classica e tecnica e della primaria e normale raccolta delle leggi, regolamenti, istruzioni ed altri provvedimenti governativi emanati in base alla legge 13 novembre 1859 con note spiegative e raffronti colle leggi precedenti approvata dal Ministero della Pubblica istruzione*, Torino, Tipografia Scolastica di Seb. Franco & figli e comp., 1861, p. 251-282. More generally, cfr. A. Tonelli, *L'istruzione tecnica e professionale di Stato nelle strutture e nei programmi da Casati ai giorni nostri*, Milano, Giuffrè, 1964, pp. 21-22.

¹⁰ D. Bertoni Jovine, *La scuola italiana dal 1871 ai giorni nostri*, Roma, Editori Riuniti, 1958; G. Cives (ed.), *La scuola italiana dall'Unità ai nostri giorni*, Firenze, La Nuova Italia, 1990; S. Santamaita, *Storia della scuola*, Milano, Bruno Mondadori, 2010.

2. *The origins of a school model*

But what were the matrices of this new model of school and the organisation of the classical secondary school defined in the Casati law and then extended to the new Kingdom of Italy, thus arranged in order to define the organisation of education for the ruling classes and thus contribute significantly to the construction of the national identity? Historiography has traced these most remote cultural and regulatory origins above all to the school history of the kingdom of Piedmont and Sardinia during the first half of the 19th century¹¹. The Savoy kingdom was one that from the 18th century had begun a process of secularisation of education, aiming to remove the church's control over universities and education, at the same time initiating a process of construction of a network of schools, certainly more attentive to the 'high' level of university. This secularisation process continued and in the 19th century ended in 1848 with the expulsion of the Jesuits, coinciding with the Boncompagni law, which established the transference to the State of the control over all educational establishments, exercised through the new bureaucracy defined by the Ministry for Public Education, and a new organisation of primary and secondary education. In particular, on 4 October 1848 two laws were issued on the specific issue of secondary education. The first, the 818, in art. 4 provided for the subdivision of educational levels in elementary (lower and upper), secondary and university. Secondary schools were defined as «those in which the ancient and foreign languages are taught along with elements of philosophy and the sciences, in preparation for university studies» distinguishing them from the so-called «special» schools which «trained in the professions for which no specific teaching was available at university»¹², the forerunner to the

¹¹ Ministry of Public Education, Royal Commission for Secondary Studies in Italy. *I Relazione*, Roma, Tipografia Ditta Ludovico Cecchini, 1909, specie pp. 11-31; I. Picco, *I precedenti italiani, storici e legislativi, della legge Casati*, «I problemi della pedagogia», January-February 1959, pp. 1-76; D. Ragazzini, *Per una storia del liceo*, in *La scuola secondaria in Italia (1859-1977)*, Firenze, Vallecchi, 1978, pp. 135-245; R. Berardi, *Scuola e politica nel Risorgimento. L'istruzione del popolo dalle riforme carloalbertine alla legge Casati (1840-1859)*, Torino, Paravia, 1982; M. Raicich, *Scuola, cultura e politica da De Sanctis a Gentile*, Pisa, Nistri-Lischi, 1982; L. Ambrosoli, *La scuola secondaria*, in G. Cives (ed.), *La scuola italiana dall'Unità ai nostri giorni*, Firenze, La Nuova Italia, 1990, pp. 105-151; M. Raicich, *Itinerari della scuola classica dell'Ottocento*, in S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea, I. La nascita dello Stato nazionale*, Bologna, il Mulino, 1993, pp. 131-179; G. Bonetta, *L'istruzione classica nell'Italia liberale*, in G. Bonetta, G. Fioravanti (edd.), *Fonti per la storia della scuola, III, L'istruzione classica (1860-1910)*, Roma, Ministry for Cultural and Environmental Heritage, Central office for archive heritage, 1995, pp. 18-96; A. Scotto di Luzio, *Il liceo classico*, Bologna, il Mulino, 1999; A. Santoni Rugiu, *La lunga storia della scuola secondaria*, Roma, Carocci, 2007; P. Morelli, *Una cultura classica per la formazione delle élites. L'insegnamento del latino nei Ginnasi-Licei postunitari attraverso l'Inchiesta Scialoja sull'istruzione secondaria (1872-1875)*, Macerata, eum, 2009, particularly pp. 66 and following.

¹² Berardi, *Scuola e politica nel Risorgimento. L'istruzione del popolo dalle riforme*

technical schools introduced by Casati. We should specify that Law 818 did not establish a particular time frame for classical secondary education, which was left vague and in fact specified better in the subsequent law, 819 of the same day, 4/10/1848, which established the national boarding schools (the *collegi-convitti*). They were introduced to replace the suppressed *collegi* of the Society of Jesus, who had been officially expelled the previous August and this underlined the intention to replace the Jesuit organisation with a new state lay model, which however maintained elements of continuity with the Jesuit tradition, itself the heir and re-elaboration of the medieval *trivium* (Grammar, Logic and Rhetoric) and *quadrivium* (arithmetic, music, geometry and astronomy). The new national boarding schools were a kind of «institutional experimentation» of a state model replacing that of the Jesuits¹³, which had become increasingly unpopular. It included courses in Grammar, or rather «Latin grammar and Italian composition» (reduced from four to three years), Rhetoric (two years) and Philosophy (two years) with an elementary four-year 'preparatory' course. In fact, the programme included Grammar, for three years with Latin grammar and Italian composition, Rhetoric for two years, applied to both Italian and Latin languages, Philosophy for two years and Elementary for four years, for a total of eleven years of curriculum divided into seven secondary and four elementary¹⁴. In addition there were 'accessory' courses, covering other subjects for the whole five years, including religion, ancient and modern history and geography, arithmetic-geometry and drawing, a third course of natural history, a fourth course of Greek grammar and a fifth of French language. Great discussion was held in the Kingdom over these accessory courses, the new subjects to be included in the traditional *curriculum*, between the supporters of the classic system and the promoters of an extension to the accessory courses, in order to develop a more modern study programme in line with the needs of the middle classes which were increasing in importance in society and which also demanded sciences, French and geography, not only Latin. The organisation was no longer closely tied to these national boarding schools, but acted rather as a model for the future Piedmont school system due to the 'bottom-up' adaptation of the municipal administrations and the teachers, but also subsequent decrees including Royal Decree (R.D.) of 28 January 1852 issued by Farini which made modern European and Italian history, arithmetic and physical geography, Latin,

carloalbertine alla legge Casati (1840-1859), cit., p. 87 and following; P. Bianchini, *Educare all'obbedienza. Pedagogia e politica in Piemonte tra Antico Regime e Restaurazione*, Torino, SEI, 2008.

¹³ G.P. Brizzi, *La formazione della classe dirigente nel Sei-Settecento. I 'seminaria nobilium' nell'Italia centro-settentrionale*, Bologna, il Mulino, 1976.

¹⁴ Real change was in fact brought about with the introduction of the four-year elementary school, which ended by benefiting the secondary path as it offered access to secondary education at ten years and no longer at eight, granting greater maturity and cultural knowledge to the *ginnasio* students. Berardi, *Scuola e politica nel Risorgimento. L'istruzione del popolo dalle riforme carloalbertine alla legge Casati (1840-1859)*, cit.

Italian and French literature mandatory in the schools of philosophy; R.D. of 4 September 1855 provided for these courses in all secondary schools. Continuity with the Jesuit traditions was progressively fading, with the introduction of these accessory courses, the echo of a debate on the classical secondary school *curriculum* underway in Piedmont. In regulatory terms, on 6 March 1854 the Cibrario project was proposed, introducing the names *ginnasi* and *licei*, and doing away with the centuries-old name of schools of «grammar, humanities, rhetoric and philosophy»¹⁵. This project involved secondary education that was ‘finally’ divided into:

- *ginnasio*, a five year programme teaching «rational and positive philosophy»; there was one in each provincial capital, funded half by the local municipality and half by the state.
- *liceo*, with a three year programme in classical literature, philosophy, elementary mathematics and natural history; it was funded by the state but furnished by the municipality; the *liceo* issued a diploma used for employment purposes.
- technical education, with two grades: the lower technical school, in every provincial capital, with a three-year programme; and the two-year upper technical institute.

Cibrario’s plan was not approved for domestic political reasons and due to international questions relating to Piedmont’s involvement in the Crimean War, but in fact lay at the basis of the Casati Law; in fact, as I. Picco notes, with the Cibrario plan, «the cards were all on the table. The Casati Law is indeed nothing more than the repetition of the Cibrario plan»¹⁶. In fact the Cibrario plan was lacking any instruction on the organisation of the «scuola normale», the teacher training school, which was instead introduced in 1858 in Piedmont as a ‘normal school’ and included in title V of the Casati Law, in the part referring to primary education. In this regard it is worth underlining the reason for this choice: it was felt that the training of teachers should be specified under title V of primary education and that it was of no relevance to actual secondary schools.

What were the reasons for this change between 1848 and 1854 in the planning of secondary schools and *ginnasi-licei* in particular? What happened between 1848 and 1854 politically and culturally that motivated such a change in the secondary school model between Boncompagni and Cibrario? As explained by historiography, in the decade running up to unification a rich debate was held in Piedmont on the issue of education and schooling, developed also within the highly important *Society of Education and Instruction* (1849) chaired by

¹⁵ *Riordinamento dell’Istruzione pubblica. Progetto di legge presentato alla Camera il 6 marzo 1854 dal ministro dell’istruzione pubblica (Cibrario)*, «Atti del Parlamento subalpino. Documenti», n. 36, also referred to in Picco, *I precedenti italiani, storici e legislativi, della legge Casati*, cit., pp. 66-67; pp. 74-75.

¹⁶ *Ibid.*, p. 76.

Vincenzo Gioberti, with Domenico Berti, Giovanni Maria Bertini and in the many educational and school journals which were published during that time¹⁷. The awareness of the importance of the issue of schooling within the framework of a Risorgimento pedagogy working to construct the identity of the Italian nation, had in 1850 driven Piedmont members of parliament Luigi Parola from Cuneo and Vincenzo Botta to travel to Germany to study the German school system, a study that was later published in the book *Del pubblico insegnamento in Germania libri tre* (Torino, 1851); this first journey was followed by a subsequent 'pedagogic' tour ordered by the government and carried out by Carlo Cadorna in 1853, Minister of Education in 1849¹⁸, inaugurating a rich season of 'pedagogic trips' to other foreign countries which was to become a guiding thread of the cultural and educational strategy after Unification, as documented in the work of Pasquale Villari and Aristide Gabelli in the decades following unification, comparing European school systems and contributing to the review of the Italian system and the introduction of French pedagogic and teaching methods, as well as education comparison which is now consolidated practice¹⁹. It is precisely the knowledge of the high level of culture and success of the German school system, drastically reorganised by Humboldt in Prussia marked by a renewed concept of *Bildung* anchored to the humanist renaissance model and solidly grafted onto the emerging nationalism to support the process of German unification – at the same time as that of the Italian Risorgimento – that offered the cultural and political wealth of the German model, with the strength of its philology and the study of Greek, of Erasmusian and Renaissance origin. This German model had also been partly present in the Lombardy area since the Austrian reorganisation of Maria Teresa in the 18th century, inherited during the Napoleonic period with the establishment of *ginnasi* and *licei* – the latter state-run and particularly dear to Napoleon for training the ruling classes – and remaining during the Lombardo-Veneto Restoration: a model focusing not only on traditional Latin, but above all on the more modern sciences and natural history, as well as philology and Greek language, which was practically absent from the classic Piedmont tradition²⁰. In any case from the 18th century

¹⁷ Raicich, *Scuola, cultura e politica da De Sanctis a Gentile*, cit.; Id., *Itinerari della scuola classica dell'Ottocento*, cit.; Scotto di Luzio, *Il liceo classico*, cit. particularly pp. 53-63.

¹⁸ A. La Penna, *Modello tedesco e modello francese nel dibattito sulla Università italiana*, in Soldani, Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea*, cit., Vol. I, pp. 174-175.

¹⁹ G. Chiosso, *Il viaggio pedagogico nella seconda metà dell'800. Le relazioni delle missioni all'estero nel "Bollettino ufficiale del Ministero della Pubblica Istruzione"*, in the Deeds of the Conference organised by C.I.R.S.E. (Italian Centre for Historic and Educational Research) entitled «I Musei dell'educazione: storia e prospettive» held in Padua on 30 and 31 May 2003, being published.

²⁰ D. Giglio, *I ginnasi e i licei lombardi nell'età della Restaurazione*, in I. Ciprandi, D. Giglio, G. Solaro (edd.), *Problemi scolastici ed educativi nella Lombardia del primo Ottocento*, Vol. II: *L'istruzione superiore*, Milano, Sugarco Edizioni, 1978, pp. 87-192; Scotto di Luzio, *Il liceo*

onwards in Lombardy and Veneto the school system developed according to a structure of municipal primary schools, with *ginnasi* and *licei* and a close-knit network of technical schools – based on the German Realschule model – needed to accompany the economic development of trades and small businesses in progress: all these experiences were acquired and filtered into the Casati Law²¹. And here is where the part of the Casati Law concerning secondary education – issued during the period of annexation of Lombardy and following those ‘pedagogic tours’ we referred to earlier – acknowledged the influence of both the German and the Lombardo-Veneto model, introducing technical schools and technical institutes, Greek language in the *ginnasio* and Greek literature in the *liceo*, but also chemistry and natural sciences, drastically altering the curricular and teaching balances in Piedmont and the different local realities of the whole peninsula being annexed, with outcomes that were still to be fully understood. In fact, the part of the Casati Law concerning classical secondary education was the point of arrival of a pedagogic and didactic debate underway in Piedmont, which had been developed and evolved internally over the years (particularly from 1848 with the Boncompagni Law and from 1854 with the Cibrario Plan), strongly adopting the features of the German and Lombard models which in turn were inherited from the Austrian-based classical secondary system, adding the new importance of Greek, philology and the German language. These two German and Lombard traditions, both inherited from Maria Theresa, then Napoleon, then again from Austria – laid the foundations for the drafters of the Cibrario Plan firstly and later more firmly in the Casati Law concerning classical secondary education in the new Kingdom of Italy, which was being defined on the dawn of that February day in 1860 also in the city of Bologna.

3. *A difficult start for the ‘Galvani’ Liceo. The start of an investigation*

It is still to be fully investigated how this new curricular programme indicated in the Casati Law for classical secondary education was adopted and implemented in the rest of the Peninsula which was progressively annexed to the Kingdom of Piedmont and which went on to constitute the young Kingdom of Italy from 1861. Case studies on the various local realities may define the

classico, cit., pp. 54 and following.

²¹ Ciprandi, Giglio, Solaro (edd.), *Problemi scolastici ed educativi nella Lombardia del primo Ottocento*, Vol. II, cit., pp. 87-192; M. Piseri, M. Gecchele, *Fedeli sudditi e buoni cristiani. La “rivoluzione” scolastica di fine Settecento tra la Lombardia austriaca e la Serenisima*, Verona, Mazziana, 2000; M. Piseri, *I Lumi e l’“onesto cittadino”*. *Scuola e istruzione popolare nella Lombardia teresiana*, Milano, Vita e Pensiero, 2004; S. Polenghi, *La pedagogia austriaca tra Sette e Ottocento*, «Pedagogia e vita», n. 3, 2002, pp. 65-84; S. Polenghi, *La scuola degli Asburgo. Pedagogia e formazione degli insegnanti tra il Danubio e il Po (1773-1918)*, Torino, SEI, 2012.

manner and timing of this programme, also highlighting the problem of the relationship with private schools and the persistence of local traditions, from the viewpoint of novelty and discontinuity which underlies one of the ripest interpretations of the history of schools and the whole Italian nation²².

As mentioned, on a cold snowy day, the Farini decree established *licei* in all the provincial capitals, funded by the state, instructing them to be operational from the following academic year, 1860-1861. But what State, anyhow? The provinces of Emilia were a compound, diversified reality. Here, following the expulsion of the Austrians on 12 June 1859, the Albicini decree firstly and the Cipriani decree later (25/10/1859) had placed all educational establishments under the control of the Government of Romagna, then unified from 9 November 1859 by Farini as the Provinces of Emilia which, following the consensus of 11-12 March 1860, voted for the annexation to the Kingdom of Sardinia²³. Only then did the Sardinian legislation – though not yet officially the whole Casati Law – became a model for the annexed regions, including Emilia. Very soon the problem arose over the relationship between the level of the *ginnasio*, funded by the municipalities, and that of the *licei* which were instead the responsibility of the State: an important difference in organisation, as right from the start they did not ensure the necessary curricular and pedagogic continuity of the two school levels, appointed as they were to two different managers and concerning which Farini had shed no light in his decree of 12 February 1860, which governed only the *Licei*. In Bologna, it is well known, the so-called ‘Santa Lucia’ schools became the municipal *ginnasio*, handed over by the Municipality to the Barnabites as there were no other new teachers trained in the new subject such as the Greek language. The Barnabites, who had taken over from the Jesuits in the Santa Lucia College in Via Castiglione, after the papal expulsion (1773), remained in the municipal *ginnasio* until 1867 (a year after the ministerial circular letter of 1866), under a constant fire of accusations of lack of training and poor teaching skills, as emerges from the study by Campanelli²⁴; possibly founded accusations, but certainly motivated both by the local and national political and cultural conflict of the times between the State and the Church, caused by the temporal dominion which was being ‘expropriated’ (and Bologna was one of the hot-spots of this conflict) but also due to the difficulties of the new *curriculum* outlined in the Casati Law compared to the previous rhetoric and

²² On the Bologna area, cfr. one of the first studies by F. Bochicchio, *I precedenti storici dell'istruzione tecnico-professionale nell'area bolognese dalla legge Casati alla Carta della Scuola*, in the Institute for the Artistic and Cultural Heritage of the Emilia Romagna region, *Manutenzione e sostituzione. L'artigianato i suoi modelli culturali, la città storica*, Bologna, Clueb, 1983 then republished in Id., *Democratizzazione della scuola italiana. Momenti e problemi*, Bologna, Clueb, 1995, pp. 203-233.

²³ Bottrigari, *Cronaca di Bologna*, cit., pp. 26-31. *Raccolta Atti governativi pubblicati nelle provincie delle Romagne dal 12 giugno 1859 al 18 marzo 1859*, cit.

²⁴ A. Campanelli, *Il Regio Liceo “Galvani” dal 1860 al 1865. Presidenza Cima*, in *I cento anni del Liceo “Galvani” 1860-1960*, Bologna, Cappelli, 1961, particularly pp. 97 and following.

classical tradition. Looking only at the level of the three year *liceo* established in the Casati Law – as the study of the municipal *ginnasio* would require a whole research project of its own, considering the separation of the organisational and management system of the two school levels, with *ginnasio* teachers paid by the Municipality and *liceo* teachers by the State, at least until 1896 when the municipal *ginnasio* was handed over to the State²⁵ – the initial path in Bologna, only named after Luigi Galvani in 1865, was not an easy one.

It was not easy for a number of reasons, partly explained in Campanelli's study of 1961. First of all, due to the complex logistics involved in the unsuitability of the first premises, which was transferred from the Portico della Morte to its current location in Via Castiglione only in 1882²⁶. Secondly, there were difficulties in the initial management of the school, both due to the abundance of national regulations from Turin and in terms of internal curricular organisation: all matters which made the birth and start-up of a state school very difficult, also considering the competition faced from private secondary schools which had been running in the city for many years.

From a management viewpoint, on 22 September 1860 the Ministry issued the first *Implementing regulation for secondary schools*, indicating the number of teaching hours for each subject, the obligation for military exercises and gymnastics taught by special instructors (in Bologna it was, with some difficulty, Emilio Baumann) and rules concerning entrance exams, final examinations and the issue of diplomas, as well as disciplinary measures to be adopted with the students²⁷. On 15 October 1860 the Educational Authority sent the Headmaster the school calendar for the academic year 1860-1861, and on 16 October 1860 defined the teaching staff for the new *Liceo* which, on 3 November 1860, held its first staff meeting²⁸, chaired by Headmaster Antonio Cima, with Leopoldo Marengo assigned to Italian Literature, Pietro Casanova to Latin and Greek Literature, Alfonso Colognesi to Mathematics, Professor Giulio Carini to Physics and Candido Mamini, holding the temporary post in Philosophy²⁹. From 12 November entrance exams were held, and a total of 56 students were

²⁵ Confirmed in the deed of 21 October 1896, cfr. Campanelli, *Il Regio Liceo "Galvani" dal 1860 al 1865*. Presidenza Cima, cit., pp. 97 and following.

²⁶ *Ibid.*, pp. 391-392.

²⁷ *Regolamento per le scuole mezzane o secondarie approvato con R.D. (n. 4311) 22 settembre 1860*, in *Codice dell'istruzione secondaria classica e tecnica e della primaria e normale raccolta delle leggi, regolamenti, istruzioni ed altri provvedimenti governativi emanati in base alla legge 13 novembre 1859 con note spiegative e raffronti colle leggi precedenti approvata dal Ministero della Pubblica Istruzione*, cit., pp. 139-171.

²⁸ Campanelli, *Il Regio Liceo "Galvani" dal 1860 al 1865*. Presidenza Cima, cit., pp. 390-392.

²⁹ The group which started the Bologna liceo also included Prof. Luigi Sailer for History and Geography, the caretaker Clemente Vecchi and the custodian Gaetano Romani, in *Annuario dell'istruzione pubblica pubblico per l'anno scolastico 1860-61*, Torino, Coi Tipi di Giacinto Marietti, 1861, pp. 347-348, from where it is understood that Prof. Pietro Casanova was a priest.

enrolled to the first year and 40 to the second, but none to the third. In the following year, 1861-62 however there was a drastic reduction in admissions to the state *Liceo*: only 6 to the first year, 21 to the second (18 of which came from the previous first year class of the same state *Liceo*) and only one to the third year from Modena: here the headmaster referred to the problem of private 'competition' to explain the low admission levels to the first year, in fact

the low number of pupils is due to the opening once again this year of a private course in Philosophy at the Barnabite Boarding School in this city, which has set out to complete the *liceo* programme in two years, are rather, should we rather say to complete the study programme required for admission to this university, and with the certainty of not being forced to sit the *liceo* final examination³⁰.

Headmaster Cima described the crucial problem for the solid establishment of the state *licei*, during this delicate phase of start-up of the state school system, that the *liceo* diploma was not required for admission to university, and that therefore the existing private schools, which offered a solid structure and *liceo*-equivalent courses but delivered in less time, constituted an unfair competition which undermined the state *licei* right from the very outset. In fact the situation began to improve slowly during the following years, when the regulations were slowly set nationally through the university regulations which aimed to grant admission to University only to students in possession of the *liceo* diploma, the only guarantee ensuring the full acknowledgement of the state *licei*³¹, where however the problem was caught up in the complex question of the university regulation, which was also suffering from the difficulties caused by the extension of the Casati Law³².

³⁰ State Archive in Bologna, Education Authority of Bologna, I series, b. 46, Reports on Licei and Ginnasi 1861-1872, *Relazione generale del Preside del Regio Liceo di Bologna al Sig. Ministro della Pubblica Istruzione intorno all'anno scolastico 1861-62*, dated 7 August 1962.

³¹ Only in R.D. no. 4613 of 24 January 1861 was it established that «nobody shall be accepted to the entrance exam for the faculties of the Universities of Bologna, Ferrara, Modena and Parma, unless they have obtained the *liceo* diploma in conformity with the Royal Decree of 31 October 1860» (cfr. *Collezione celerifera delle leggi, decreti, istruzioni e circolari pubblicate nell'anno 1861 ed altre anteriori*, anno XLI, Torino, Tipografia Editrice di Enrico Dalmazzo, 1861, p. 444), then underlined again in the 1862 University Regulation signed by the Minister Carlo Matteucci, i.e. R.D. no. 842 of 14 September 1862 'General Regulation of the Universities of the Kingdom, in chapter II, point 6 (in *Collezione celerifera delle leggi, decreti, istruzioni e circolari pubblicate nell'anno 1861 ed altre anteriori*, anno XLI, second part, Torino, Tipografia editrice di Enrico Dalmazzo, 1862, p. 2642).

³² Cfr. also G. Saredo, *Vicende legislative della pubblica istruzione in Italia in Italia dall'anno 1859 al 1899. Introduzione al Codice della Pubblica Istruzione*, Torino, Unione Tipografico-editrice, 1901, pp. 35-37 stated that the University of Bologna itself was founded on the *Quod divina sapientia* Bull of 28 August 1824, the legislative decree of 6 July 1859 issued by the Central Governmental Council, and the legislative decrees issued by the Dictator of Emilia on 22 January 1860, 9, 10 February and 8 March 1860. On the university question, which is beyond the topic of this paper, we refer briefly to E. Bosna, *L'istruzione superiore nella legge Casati e nei decreti provvisori*, in C.I.R.S.E., *Cento anni di Università. L'istruzione superiore in Italia dall'unità ai*

Another aspect which further marked the difficult start of the Galvani liceo in Bologna was linked to the teaching contents, the new *curriculum* laid down in the Casati Law. In this regard, the issue of Greek teaching is emblematic. On 17 November 1860 the national *Teaching programmes* were issued for the *ginnasi* and *licei* certificates³³. These programmes focused on the final examination and certification, and were not based on yearly teaching, but rather laid out the set of knowledge that had to be demonstrated at the end of the *liceo* education. They were very encyclopaedic programmes, as underlined in the historiography³⁴, and many partial adjustments were made over the following years, emblematic of the difficulty in defining a *curriculum* for the classical secondary school which, particularly with the introduction of Greek language and literature, but also mathematics and physics, no longer fitted perfectly into the traditional mould. There was therefore an evident problem of training teachers in the new Greek philology and that of the specific texts for each subject. Also the difference between the education of the teachers of the pre-unification classical schools and that of the students of the *ginnasi*, taught in the classical tradition of grammar, humanities and Latin rhetoric, constituted a further difficulty in starting up the ‘Galvani’ *liceo* and the classical *liceo* generally. The constant complaints of the professors of the ‘Galvani’ *liceo* concerning the poor or non-existent *ginnasio*-type education of their pupils was due not only to ideological reasons underlying the conflict between the State and the Church - represented by the state *liceo* and the municipal *ginnasio* run by the Barnabites until 1866, and then run municipally with lay teachers and known as ‘Luigi Guinizelli’ and finally unified by royal order to the Galvani Liceo in 1896 – but the type of education offered in the *ginnasio* in those subjects, such as Greek and the sciences, which were traditionally taught little or not at all in the *ginnasi* of the time. Perhaps the professors of the Galvani teaching staff were aware of this gap, the distance between the old and new model of the *liceo* laid down in the Casati Law, and from 1863, they felt the need to open a preparatory school prior to the *liceo*, a service provided by them free of charge, in order to fill the educational gaps presented by the *ginnasio* students before they attempted the entrance exam.

nostri giorni, Napoli, Edizioni Scientifiche Italiane, 1986, pp. 123-135; S. Polenghi, *La politica universitaria nell’età della Destra storica 1848-1876*, Brescia, La Scuola, 1993, p. 131 note 55; G. Fioravanti, M. Moretti, I. Porciani (edd.), *Fonti per la storia della scuola, V: L’istruzione universitaria (1859-1915)*, Roma, Ministry for the Cultural Heritage and Cultural Activities, Central office for archive heritage, 2000.

³³ *Programmi per gli esami finali del Corso liceale, approvati con R. Decreto (4463) 17 novembre 1860*, in *Codice dell’istruzione secondaria classica e tecnica e della primaria e normale raccolta delle leggi, regolamenti, istruzioni ed altri provvedimenti governativi emanati in base alla legge 13 novembre 1859 con note spiegative e raffronti colle leggi precedenti approvata dal Ministero della Pubblica istruzione*, cit., pp. 172 ff.

³⁴ D. Ragazzini, *Per una storia del liceo*, in *La scuola secondaria in Italia (1859-1977)*, cit., particularly pp. 150 and following; Bonetta, *L’istruzione classica nell’Italia liberale*, cit.

Also the final annual reports produced by the Headmaster Antonio Cima and the teachers highlight the gaps in the pupils' education, for example concerning their poor knowledge of Greek. In the report of 1861 Professor Pietro Casanova, teacher of Greek and Latin Literature, stated that he had adopted the Greek Grammar by Pecchenino³⁵, as the students knew no Greek at all, but that he wished in future to adopt the Greek Grammar by Curtius³⁶. It in fact referred to two Greek texts between the old and new programme, in fact the *Curtius* was the book written by the famous German philologist in 1852 the translation of which, dating back to 1855, was for the whole post-unification period the basic text for the renewed approach to comparative linguistics based on the centrality of Greek, widely used also by teachers called on to respond to the questions of the famous *Inchiesta sulla scuola secondaria* of 1872, better known as the 'Scialoja Investigation'³⁷. Casanova himself, again in the final report on teaching written in the following academic year 1862-63, explicitly stated that in the first year he had had to start with the Greek alphabet:

Greek language. The few and very faulty notions the [...], students of this course possessed of Greek grammar forced the teacher to start the teaching programme from the beginning, starting with the alphabet³⁸.

Moreover:

equally lamenting the lack of a Greek grammar which, starting from Italian, allows access to the young people of this language, following the trail of Kuhner and Curtius³⁹.

Complaining of the poor educational level of the *ginnasio* students arriving at the *liceo*, Casanova did not only repeat the usual lament of teachers of all times, who so readily complain of the work carried out by their colleagues of the previous school level. In terms of the history of school and teaching, his comment referred to the problem of the application of the new Casati Law which, implementing the demands of Sardinian school history in its blending with the Lombard and German traditions, had altered an age-old system on which classical education was based not only in the pre-unification states, but also in the second city of the ex-Papal State, Bologna of the Risorgimento, which in that snowy February of 1860 had inaugurated the state *liceo*, later named in the memory of the famous Luigi Galvani.

³⁵ State Archives in Bologna, Educational Authority in Bologna, b. 37 Licei 1861-1865, File. 861, List of textbooks for A.Y. 1860-61 dated 20 December 1861.

³⁶ Campanelli, *Il Regio Liceo "Galvani" dal 1860 al 1865. Presidenza Cima*, cit., p. 65.

³⁷ Raicich, *Itinerari della scuola classica dell'Ottocento*, cit., particularly pp. 160-161; G. Bonetta, G. Fioravanti (edd.), *Fonti per la storia della scuola*, Vol. III: *L'istruzione classica (1860-1910)*, cit., pp. 213 and following.

³⁸ State Archives in Bologna, Educational Authority in Bologna, I series, b. 46, Licei and Ginnasi Reports 1861-1872, Report by Pietro Casanova school year 1862-1863.

³⁹ *Ibid.*

Penetration of the scientific discourse into textbooks of religious instruction in the 1910s in the Ottoman Empire

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ABSTRACT: The subject matter, method and purpose of religious instruction were debated in the years following the 1908 revolution. The educational journals brought the issue of religious education into question and developed a new point of view that categorized religious instruction in new pedagogical terms. The aim of the instruction, the methods and subject matters which were to be taught according to the biological and mental development of children were redefined in the period. The traces of the religion in primary schools deserve attention due to the religious goals in pedagogical understanding and the frequency of religious subjects in the curriculum in this period. Since the Ottoman Empire had gone through a long modernization process in political, social and economic aspects, it is worth questioning how the secular worldview and knowledge were incorporated into the terrain of Islamic subjects. For this reason, the focus of this paper is on the transformation of religious knowledge with respect to secular thinking. The textbooks for children provide a fruitful resource to view the change on the primary school age level. The way the secular discourse was espoused into the religious discourse is revealed as well as the way it produced and strengthened the modern Islamic worldview. The paper seeks the tensions and resistances to modernity which was perceived necessarily as a smooth transition from the old to the new.

TEE/EET KEYWORDS: History of Education; Islamic Education; Textbooks; Late Ottoman Empire; Modernization of Education.

Bureaucrats in the Hamidian years strove to balance the religious instruction with the challenge of modern knowledge in school curriculums¹. The proportion of religious instruction was increased in the curriculum as a solution to the

¹ A. Berker, *Türkiye'de İlköğretim I. 1839-1908*, Ankara, Milli Eğitim Basımevi, 1945, pp. 158-165.

supposed ‘moral degeneration’ of the youth whereas the content of the courses remained unchanged and repetitive². One of the criticisms was that the authors were not suitably qualified to write pedagogical textbooks graded both in language and subject matter, which were to be conveyed to the students by encouraging the practice of reasoning instead of memorization³.

Besides pedagogical problems, the content of textbooks was conservative in that they sustained the classical religious subjects, the discourse of which had been established in the earlier periods. The textbooks were in the scope of an *ilmihal* book, which illustrated the basic principles and practices of Islamic belief with the required details in worshipping. Two books prepared by the Office of *Meşihat* (the office regulating the religious schools and policy) for the primary schools (*sıbyan* schools) were the duplications of *Dürr-i Yekta* and *Risale-i Birgivi*, which had been textbooks of Rushdiye schools and Enderun in Tanzimat period⁴. Textbooks titled *İlmihal* and *Muhtasar İlmihal* reproduced the religious knowledge in the following change of curriculum in 1891; however, the search for an ideal composition of religious subjects continued since the existing sources were not found satisfying in respect to the new pedagogical terms for students who had developed new perspectives and interests with their engagement in courses teaching science and nature. Zengin, in his contextual evaluation of the textbooks of religion in Hamidian period, comments that reproduction of textbooks failed to catch the ‘needs’ of the modern period due to the conservative attitude of the *Meşihat*⁵.

Teaching Islamic knowledge, which was realized to have been remolded through the means of the pedagogical perspective⁶ in the Hamidian period, tended to develop an approach communicating with modernity. Yet, the new theoretical explorations in modern pedagogy were not applied on the content and form of textbooks. The use of the new scientific explorations in reproducing the religious knowledge was propounded in the textbooks as a reformist policy to communicate with the modern patterns of thoughts following the Constitutional Reform in 1908. The conflict between the modern school knowledge and the religious epistemology thus gained a visibility over the pages of the textbooks of religion taught in the modern school system. The main conflict was that the Islamic epistemology, which incorporated and supervised all other forms of knowledge, was diverted into a regulated and categorized subject as well as preserving an overall impact in the curriculum⁷.

² Z.S. Zengin, *II. Abdülhamit Dönemi Örgün Eğitim Kurumlarında Din Eğitimi ve Öğretimi*, İstanbul, Çamlıca, 2009, p. 77.

³ It is reported in a document prepared by a commission in 1885 and gathered to evaluate the religious instruction in primary schools. *Ibid.*, p. 97.

⁴ *Ibid.*, p. 97.

⁵ *Ibid.*, p. 106.

⁶ As discussed in the first chapter in Ziver Bey’s guide to teachers, he supported the idea of inter-relating the scientific truths to the Quran verses and hadith.

⁷ S. Tobani, *The Dilemma of Islam as School Knowledge in Muslim Education*, «Asia Pacific

Qualifying the Religious Education

Religious instruction in the modern schools was problematized for two reasons in the Constitutional Monarchy period: one was the scientific ‘need’ to teach/define/classify Islamic knowledge with respect to pedagogy, the other was the supposed «moral depression» (*ahlaki bunalım*) among the youth, who were noted as having lost their faith under the influence of materialism. Here the two reasons complemented each other in that it was believed that the pedagogical reformation of knowledge would resurrect Islam and thus combat the evils of materialism. Behind this was, on one hand, the challenge of religion through the reproduction and empowerment of Islamic knowledge against the modern science; on the other, the secularization of Islam under the impact of the modern science and its epistemological philosophy⁸. The writers of textbooks and Islamist intellectuals can be observed as having had one or both of the discourses during the Second Constitutional Period between 1908 and 1918.

The reformist policy about the curriculum of Islamic subjects seemed to gain widespread support due to the ‘moral depression’ supposed to dominate the youth in modern schools. The Unionist policy targeted the content of the religious education instead of increasing the proportion of the religious instruction in the curriculum. This renovation attempt has been neglected by studies on the policy of religious education in the Unionist regulation⁹. The government generally is criticized having decreased the hours of religious instruction without an interpretation of the contextual analysis. The Union and Progress’s operation in the content of religious instruction aimed both at the modern schools and the old established school system in the *medrasas*. While secularization of the state was occurring as the policy, the party’s attempts to reform the *medrasas* and the religious education in the modern schools reinforced the Islamic epistemology within a new understanding of religion, which is inherited by the modern Islamic ideology¹⁰.

A reform of the *medrasas* was no ways feasible without coming up against the Office of *Meşihat*, which institutionally supervised the *medrasas* and directed

Journal of Education», vol. 27, n. 1, 2007, p. 12.

⁸ İ. Kara, *Din ile Modernleşme Arasında Çağdaş Türk Düşüncesinin Meseleleri*, İstanbul, Dergah, 2005.

⁹ For a study that emphasizes the decrease in the frequency of religion courses without having a look into the context see, H.S. Çeliktaş, *II. Meşrutiyet Sıbyan Mekteplerinde Din Öğretimi*, MA thesis, Uludağ University, 2006.

¹⁰ Whether *medrasa* reform was proposed for restoring Islam or for undermining it in order to strengthen secular Turkish nationalism is discussed in Sarıkaya’s work. The author assumes all Unionists were secular nationalists. The policy of Islam is counted just as a trap for religion. He agrees with the linear modernization theory that ignores the ruptures and resistance created by the conservatives among the Unionists (Yaşar Sarıkaya, *Medreseler ve Modernleşme*, İstanbul, İz yayıncılık, 1997). For a counter argument on *medrasa* reform in the same period, see Z.S. Zengin, *II. Meşrutiyette Medreseler ve Din Eğitimi*, Ankara, Akçağ, 2002.

the religious policy. The *medrasa* and the modern schools were related in that the religious education in the modern schooling was carried out by *medrasa* graduates¹¹. Not only the religious courses, but also the courses on social sciences such as history and geography were taught by *medrasa* graduates who had passed in the proficiency exams. Thus a change in the policy of the religious teaching in the modern schools was indispensably part of the *medrasa* and *ulema* class on a larger scale. The propaganda about the matter of religion was led in two directions. On the one hand, the policy led by the Office of *Meşihat* until the Second Constitutional period was criticized on the grounds of the separatist trends among Muslims and the failure of religious epistemology across the scientific thought. The declaration of *medrasa* students in 1913, coinciding with Musa Kazım's period of chairmanship of the *ulema*, drew the outlines of the reasons for a reform in the *medrasa* programs¹². The declaration called for a reform in the *medrasas* giving that the political foundation of the constitutional regime made people clearly see it as a crucial policy¹³.

The Office of *Meşihat* was criticized for its policy of religion which was seen to be inefficient against nationalist demands. The periphery of the Empire, which stretched along the borders of the conquered lands, was believed to have been left without official religious instruction. To these critical ideas, the governments had accomplished its business by conquering new lands, but the Office of *Meşihat* had been unsuccessful and insufficient in setting up Islamic ties with these geographies throughout the history. The case of the Albanians was posed to be the most disconsolate example of the failure of religious policy. All of the Rumeli (territories in the Balkans) was seen as having converted to Christianity or to various nationalisms. The discontent of the Arabs also was presented as a result of the failure to establish strong ties between the center and the periphery. Anatolia, on the other hand, was no exception in terms of religious illumination. Hilmi Sabit wrote, «They know nothing about Islam. The schools are in a miserable situation, and the mosques are ruined [...] Religion survives in these lands only via customs, there is no such knowledge acquired through formal instruction»¹⁴.

A second criticism on the Office of *Meşihat* concerned its academic production. It was accused of being just as an office of state without contributing to the accumulation and reproduction of Islamic knowledge. It was claimed that the Ottomans had not contributed to the flourishing of Islamic subjects due to the Office's neglect: «No prominent scholiast (*müfessir*) and scholar of Hadith (*muhaddis*) have been raised in our time»¹⁵. The education in the *medrasas*

¹¹ M. Zekeriya, *Zühti Terbiye*, «Muallim», vol. 2, n. 17 (1333 [1917]).

¹² Kazanlı Hilmi Sabit, *Islah-ı Medaris Münasebetiyle*, İstanbul, Sırat-ı Müstakim Matbaası, 1329 [1913].

¹³ *Ibid.*, p. 3.

¹⁴ *Ibid.*, p. 9.

¹⁵ *Ibid.*, pp. 11-14.

was bounded to the content and interpretation of some ancient books. It was impossible to go further than the classical interpretations in those sources even if one attempts «to interpret more scrupulous and ulterior meaning»¹⁶. Hilmi Sabit says that «thus reason, intellect, experience and necessity lost its importance»¹⁷. The failure in «trade, industry and agriculture», three sectors which were commonly used in the literature to make sense of the progress and backwardness, arose from the *Meşihat*'s inefficiency. The declaration drew the program of an ideal education in the *medrasas* as such: the first period would be given to Islamic courses, the second to the natural sciences to strengthen the acquired religious knowledge; the third year would be allocated to the social sciences to connect with life¹⁸.

The worries about religious education became more evident in articles proposing an ideal education for the Empire. To exemplify, the Committee of National Instruction and Education declared one of its aims as saving the «poor youth who have lost virtue and honor in the streets of Istanbul» referring to the expansion of moral decay¹⁹. It announced that the committee would organize congresses calling upon the educators and scholars of Anatolia and other regions for a debate on educational issues. The committee decided to prioritize the subject of moral and religious education upon its vitality. According to İsmail Hakkı, the trouble was that most of the young people had become atheist. However, since religion as an indispensable constituent of communities should be preserved, the objective of the planned congress was to find out a new approach to religion that could communicate with the «imperatives of the twentieth century»²⁰.

The pedagogical exploration of religious education made up one part of the discussion in the journals on education. Educators who dealt with the application of modern educational methods to the courses of social and natural sciences in the curriculum seemed not as much interested in the reproduction of religious education as the other courses. For the abandonment of the religious education, some prominent university (*Darulfünun*) teachers called for new studies on teaching religion, which had a substantial significance in the elementary school curriculum especially. This reformist approach to the education of religion steered the way to new methodological suggestions in which religion was taken as a subject of study defined and categorized within

¹⁶ *Ibid.*, p. 19.

¹⁷ *Ibid.*

¹⁸ *Ibid.*, p. 45.

¹⁹ İsmail Hakkı, *Müesseselerden İsmail Hakkı Beyin Nutku*, «Milli Talim ve Terbiye Cemiyeti Mecmuası», İstanbul, Matbaai Amire, Eylül 1332 [1916]), p. 16. (The journal has this sub-title: «Milli Talim ve Terbiye Cemiyeti Tarafından Gayri Muvakkat Olarak Neşredilir. Müdürü Süleyman Paşazade Sami»).

²⁰ *Ibid.*, p. 18.

the pedagogical context. The «pedagogical Islam» inevitably gave way to the «tailored»²¹ Islam and proposed a new Islam which was reformulated according to the needs of modern life in order to preserve the credibility of religion.

The Moral Depression and «Imperatives of the Twentieth Century»

Ideas which sought to combine the Islamic epistemology with modern philosophical insights appeared both in the works of the ulema and university professors. Milaslı İsmail Hakkı's *Din-i İslam ve Ulum-u Fünun* (Islam and the Positive Sciences)²² was one of the most influential books on the textbook writers. Ali Seydi revealed his influence in order to detail the merits of Islamic practices such as ablution. The Islamic prescription of lifestyles and preferences were compared to scientific truths and the religious knowledge was confirmed in the modern scale of ideas²³.

This reproduction of Islamic pedagogy in modern ways went in parallel with the works of university teachers. Mehmet Emin, teaching history and philosophy at Darulfünun, probed the question of religious education in his conference speech titled *Dini Terbiye, Dini Tedrisat* ('Religious Education, Religious Instruction') and published in the «Journal of National Instruction and Education»²⁴. His article was directed to express the silence on the role of religion. It is understood from his speech that proposing a debate over religion for the agenda of pedagogical exploration was daring and challenging since the general tendency was to maintain a 'silence' about the role of religion. He considered religious education a 'morbid' issue in that it was felt to be 'incompatible' with modern life by more and more people each day, although this was not articulated or outspoken. To him, this silence and reluctance to discuss the question of religion increased the severity of the social problem: «Religious education in schools is one of such subjects that has been able to become subject of a common argumentation so far, although everyone rather has felt and realized it as unnatural»²⁵.

According to Mehmet Emin, this unnatural, incompatible situation had arisen from the 'wrong' religious insight which was shared on a common

²¹ The term is borrowed from Eleanor A. Doumato and Gregory Starrett, *Conclusion: Tailor-Made Islam*, in *Teaching Islam: Textbooks and Religion in the Middle East*, ed. by E.A. Doumato, G. Starrett, Boulder, CO., Lynne Rienner Publishers, 2007.

²² Milaslı İsmail Hakkı, *Din-i İslam ve Ulum-u Fünun*, Dersaadet, n.p., 1328 [1912].

²³ Ali Seydi, *Vezaif Nazariyesi Üzerine Mürettep Ahlak-ı Dini*, İstanbul, Kanaat Kütüphanesi, 1329 [1913] (30 Teşrinievvel 1326 [1910]), p. 23.

²⁴ Mehmet Emin, *Dini Terbiye, Dini Tedrisat*, «Milli Talim ve Terbiye Mecmuası», Mart, 1334 [1918].

²⁵ *Ibid.*, p. 12.

ground among the school masters, teachers and students: «Due to the incorrect understanding of religion in our schools and some wrong methods practiced, a real depression has come into being»²⁶. He added that families also were complaining about the ineffectiveness of the religious courses in the curriculums²⁷. To him, the contrast between religious and scientific knowledge had triggered the crisis and created an incongruity in the minds of the students. The moral crisis in the schools was especially sensed in the secondary education (in *idadiye* and *sultaniye* schools). One reason behind was that the students of primary school generally were taught by the same teacher and a harmony between the courses was possible to achieve. However, in the higher grades of schooling, the teachers varied according to the branches of school subjects. In this variation of knowledge, students were pushed into conflicting views of the world. Moreover, the secondary schools were financed by the state while the finance of the primary schooling was decentralized and left to the local authorities or indirectly to families. Thus creating a revival or reform against the established religious epistemology and methodology was more troublesome and less probable in primary schooling. In addition, the emergence of a critical attitude towards the content of curriculum was more probable considering the ages of the students in secondary schools.

Another point encouraging the crisis in religious education concerned the varying treatment of teachers by the state. Comparing the status of teachers, the students began to despise the teachers of religious courses. The students, exposed to such a conflict, chose the scientific point of view that they had acquired in the natural and social sciences courses. As a result, this double point of view deviated the purpose of education, which was supposedly to direct all students in one direction²⁸. Depending on all these problems, he put forward that religious education was not as fruitful as it was expected to be, regarding the proportion it had in the curriculum. As a result, the religious subjects which had been increased in hours during the previous period effected the youth negatively instead of strengthening their belief and making them more pious.

The depression, described as a depression of religion or morality, was reacted in three different ways according to Mehmet Emin. Some preferred to contend with the decreasing value of religion and shifted it with the secular and scientific mode of thought, some replaced religion with the 'national ideal', and some others similarly idealized a revival of religion upon the tenets of the modern science and society. The majority of educators can be characterized as having been conservative about the role of religion. Mehmet Emin, who was one of those developing the third attitude towards religion, opposed the devaluation of religion and thought it very harmful for the society. He disagreed with the secular

²⁶ *Ibid.*

²⁷ *Ibid.*, p. 14.

²⁸ *Ibid.*

nationalists in that the ‘national ideal’ could not be thought of separately from religion. Behind this was his conviction that religion was of vital importance for the solidarity and survival of communities. To his ideas, religion pacified the souls and strengthened the spiritual side of human beings²⁹. For this reason, he passionately endorsed religious education³⁰. Zekeriya’s diagnosis implied the same prescription, which a sort of ‘true’ religion was incorporated to national and modern education, having complained that religious education did not hold as much importance as the history and language classes in schools³¹.

According to Mehmet Emin, the goal of religious education must be to inculcate the belief in God to prepare the ground for other principles of Islam in the souls of children³². Mehmet Emin recommended faith be taught in such a way that students felt it. The practice and performance of Islamic faith took up a huge space in curriculums, whereas the faith was less emphasized. The unnecessary details of some religious commands, such as the details given to discriminate clean water from the dirty one, were not worth teaching or spending so much time on programs, for they were out-of-date guidance with respect to the scientific laboratory analysis: «While the teacher of religious education dealt with such unnecessary details, the mind of the child develops and he starts to reason and searches for the scientific truth. His faith is demolished. And he begins to perceive all the things taught him by teachers as useless and futile»³³.

The ‘true’ religion, he proposed, should teach faith as a personal issue, which meant that the practical side of the faith had to be felt by students in time: «Children should not feel forced into religious performance; the need for such performance, prayers should first be aroused in their souls. So many people hate religion because they were forced into its practice without preaching the faith in their souls»³⁴.

Those issues that do not originate from the essence of Islam and the details which do not function to strengthen the faith, and the judgments (*ahkam*) which are not in agreement with the «imperatives of the century» ought not to be taught to the students³⁵.

The sample lessons on teaching religious subjects in the «Journal of Primary School Instruction» (*Tedrisat-ı İptidaiye Mecmuası*) exhibits an example of a gradual introduction to the Islamic faith. In the sample class, the teacher had students reason over the necessity of a creator in the universe. After establishing the belief in God, the reason for thanking God, the role of prophets and the

²⁹ *Ibid.*, p. 17.

³⁰ *Ibid.*, p. 15.

³¹ M. Zekeriya, *Dini Terbiye ve Dini Tahsil*, «Muallim», vol. 2, n. 16 (1333 [1917]).

³² Mehmet Emin, *Dini Terbiye, Dini Tedrisat*, «Milli Talim ve Terbiye Mecmuası» (Mart, 1334 [1918]) p. 18.

³³ *Ibid.*, p. 22.

³⁴ *Ibid.*, p. 24.

³⁵ *Ibid.*

necessity for the Quran were presented in a logical and natural sequence of necessity. Asking questions and making students reflect on them were some common methods recommended: «If one proposes that human beings came to existence by coincidence, would you believe it?»³⁶.

Nazım İçsel's textbook made use of this method of discovering the truths through asking questions. His book differed from the others in that it taught in dialogues instead of a plain narrative. The author used a dialogue between a little girl and her grandmother. It is the only book that addressed to a female audience although it was not written specifically for girls.

Q: My Daughter, who made this watch?

A: I don't know.

Q: Does it come into being by itself?

A: No, of course. A man made it.

[...]

Q: My Daughter, could a man build or create the sea, the moon and the sun that you see over there?

A: You said he can't.

Q: No, no, find out yourself and tell me³⁷.

Satı, being one of the educators pushing religious education into the pedagogical agenda, specially recommended educators to develop methods for teaching Islam since teaching Islamic subjects occupied more hours and constituted the basis of the primary school curriculum in the Second Constitutional Period. He considered the existing textbooks and teachers of education ineffective compared to the informal teachings in family and community. The pedagogical approach to Islam was also necessary in order to combat the settled understanding of religion, which was described as bigotry prevailing in the country and is discriminated from the essence of Islam³⁸. The ineffective teaching of Islam did not originate from the insufficiency of teachers; instead, a method that classified and limited Islamic knowledge was needed. He criticized teaching six-seven year old children the abstract definitions of *farz*, *sünnet*, *vacib* (the levels of 'must's in worshipping) in Islamic teaching. Without taking into consideration the ages of children, the textbooks of *ilmihal* (the book explaining the principles of Islam to the public) were written for people from seven to seventy years old with the same form and content. These abstract definitions led children to memorization, which was the method dominating the education system. To Satı, the program in primary schools should be limited

³⁶ İhsan, *Bizi Yaradan*, «Tedrisat-ı İptidaiye Mecmuası», vol. 1, n. 1, p. 7.

³⁷ Nazım [İçsel], *Ameli Malumat-ı Diniye, Birinci Kitap* (Devre-i Ula, Birinci Sınıf), İstanbul, Matbaa-i Hayriye ve Şürekası, 1331 [1915]) (*Son programa göre tertip edilip mekatib-i iptidaiye sınıflarında tedris edilmek üzere maarif nezaretince kabul edilen ulum-u diniye külliyatının sultani sekizinci sınıflarına mahsus kısmıdır.*), pp. 12-13.

³⁸ Satı, *İlmihal Nasıl Öğretilmelidir?*, «Tedrisat-ı İptidaiye Mecmuası- (Nazariyat ve Malumat Kısmı)», vol. 1, n. 7, p. 12.

and leveled with these subjects: the oneness of God, the Prophet Mohammed's life, and the belief in the Hereafter. The requisites of forms of worships, the detailed information about the religious performances ought to be disregarded in children's texts. The existence of God should be inculcated through the things and the facts children were able to conceive. God should be taught through His work of art, nature³⁹. Prayers had to be taught with its practice without rendering the details about how it was classified in Islam.

Prophet Mohammed's life story was interpreted pedagogically in parallel to the modern life in the *asr-ı hazır* («twentieth century»). Hüseyin Ragıp's article noted the details of choice of subjects accordingly with the 'true' Islam in teaching the Prophet Mohammed's life⁴⁰. The Prophet's engagement with trade in his twenties was presented as proof of his being the father (*imam*) of the tradesmen in the present day. His application of quarantine method against the epidemics and recommendation for the public health were considered as proof of his being «the first doctor and educator» because of his teachings⁴¹.

Prophet Mohammed is the best model for the ideal man who relies only on himself. It is contrasting and contradictory that a group of people, who do not comprehend the truths in the aims and actions of the Prophet Mohammed, neglect the world life and count it as a suffering. They complain about the world, believing that it must be hated; they construct the Hereafter by abandoning the world, and prefer to prepare the road of Hereafter to improving the Bab-ı Ali (Sublime Port) Street... It is not surprising to see that such a man who humiliates the material side of the life due to a baseless mindset will despise the life of his family and the social community to which he belongs⁴².

The parallel points between the modern pedagogy and the Prophet Mohammed's sayings were also given to the regard of the readers such as the principles from simple to complex gradually, teaching calmly without rage or intimidation⁴³.

Debate on the role of religion in 1920s

It is difficult to differentiate the treatment of religion in the 1910s and 1920s. What could be clarified easily is that the texts teaching religion remained unchanged until 1927, when the religious courses were removed from the curriculum in cities. What characterizes the post-1922 books is an increasing emphasis on «the national need» (*ihhtiyac-ı milli*) point of view in addition to

³⁹ *Ibid.*, p. 13.

⁴⁰ Hüseyin Ragıp, *Hız. Muhammed, Mürebbi*, «Tedrisat-ı İptidaiye Mecmuası», vol. 4, n. 22.

⁴¹ *Ibid.*, p. 114.

⁴² *Ibid.*, pp. 118-119.

⁴³ *Ibid.*, pp. 115-116.

the «imperatives of the present century» (*asr-ı hazırım icabı*). For example, the emphasis on language gained strength with the search for a proper Turkish accent by teaching from the simple to complex⁴⁴.

A second difference lay in the education philosophy of the two periods. The Republican years witnessed the use of religion for the secular establishment of the state and society rather than attempts at developing ways to revive and ‘rescue’ religion⁴⁵. The policy of religious education in the period of the Unionists can be differentiated from the Republican period which fixed the curriculum in 1927, in its search for strengthening belief and overcoming the moral degeneration with more piousness in the scope of the prescribed ‘true’ religion.

The debate in educational philosophy actually was a reflection of the macro battle between religion and science in the minds of the Turkish intellectuals. The intellectuals were well aware of the fact that the battle was the outcome of the epistemological transformation in Europe and America as far as understood from the translations and quotations of the Ottoman intellectuals in the 1920s. İzmirli İsmail Hakkı’s translation of an article titled *Do Scientists Become Pious?* aims to show the return to religion in the developed countries: «This precious and exalted article aimed to show that some principal English speaking scientists believe in God»⁴⁶. The article, in short, described how religion complemented science without contradicting it. Questions such as «Can an educated man become pious?» and «Is there a place for religions in a scientific world?» ended with the conclusion that «Religion needs science to reach its goals. Science needs religion for moral (correct) usage of its inventions and discoveries»⁴⁷.

İzmirli İsmail Hakkı believed that ‘true’ religion which had been purified from ‘superstitious beliefs’ were regenerated after its stagnation in the West. It is possible to find the same attitude in different textbook authors in the Constitutional years. Mehmed Asım and Ahmed Cevad offered to examine the question of religion through the scientific view in their textbook titled *Anadolu Yavrusunun Kitabı- Malumat-ı Diniye* (‘The book of Anatolian Child-Knowledge of Religion’) and they added: «Islam is the most proper religion for the (present) civilization»⁴⁸. After recounting the harmony between the two, they wrote that the rise of Islam, which was even foreseen by some European

⁴⁴ Mehmet Halid, *Kur’an Muallimi*, İstanbul, Matbaa-i Amire, 1341 [1925]) (*Darülmualimin ve darülmualimatlar ile mekatib-i sultaniye ve iptidaiyede tecvid talimi için kabul edilmiştir*), p. 3.

⁴⁵ Ö. Altan, *Turkey: Sanctifying a Secular State*, in Doumato, Starrett (edd.), *Teaching Islam: Textbooks and Religion in the Middle East*, cit.; H. Şen, *Din ve İktidar: Ortaöğretim Ders Kitaplarında Yaşam Dünyası*, MA, Thesis, Ege Üniversitesi, 2002.

⁴⁶ Mr. Vurman, *Mütefenninler Dindar Olabilir mi?*, trans. İzmirli İsmail Hakkı, İstanbul, n.p., 1928.

⁴⁷ *Ibid.*, p. 22.

⁴⁸ Mehmet Asım, Ahmed Cevad, *Anadolu Yavrusunun Kitabı: Malumat-ı Diniye* (Mekatib-i İptidai, Altıncı Sınıf), İstanbul, Kütüphane-i İslam ve Askeri, 1338 [1922], p. 4.

intellectuals, would falsify the cause and effect relation between the rise of education and the demise of religions⁴⁹.

Ahmed Aksekili, another textbook writer, pointed out the ‘revival’ of religion in Europe as were the case in the above-mentioned authors’ points. First, he stated that the trend of atheism had ended in Europe. Second, he thought, like the Tanzimat intellectual Namık Kemal, that Islam and Christianity should not be put in the same pot: «After so many sorrowful experiences, the European thinkers have understood that surviving without a religion is impossible [...] They say that faith is necessary for humanity»⁵⁰. The discourse borrowed from the foreign countries, which was what Europeans commented on religion, was given to notice of the Republican reformers who accelerated the secularization process through radical reforms.

To Aksekili, Islam was compatible with what the modern world of man was obliged to be like and have: «How should the natural religion be? There is no doubt such a religion combines the material and spiritual demands justly fastening the weapon of one to the other»⁵¹. Islam was presented as a religion balancing the two worlds. To him, the justification of Islam, differently from Christianity, lay in its adaptability with the «imperatives of the century» (*asrın icabı*) which were of vital importance. Satisfying the needs of Muslims and the nature of ‘humanity’ in the twentieth century was what makes Islam legitimized universally⁵². Thus an acceptable religion or ideal Islam was justified upon its relation and compatibility value to the material world.

His conception of the state in religious patterns of thought reveals that the reformist approach here was not necessarily an invitation for the secular worldview, though the legitimization of Islam with its profane value makes one think that the author supported a sort of secularization. He criticized the conception of the state in the secular world view openly in 1927. It is clear that he did not agree with the space allocated for religion in the secular states. What he proposed aimed to strengthen Islam by directing it for the betterment of worldly affairs. This could be seen as the process of the making of a profane worldview inside the belief system. Thus what he called «natural religion» both stood against the process of secularization and became a part of it.

The parallelism between the effort of Aksekili to reconcile religion with the material world and the modern discourse manifest in textbooks shows the prolongation of the modern Islamic insight in the Second Constitutional period until the late 1920s. This parallelism is also observed to be in public sermons other than the textbooks. The defense of religion in this way is observed to have continued its impact in Republican Turkey. The high school textbook

⁴⁹ *Ibid.*, p. 4.

⁵⁰ Ahmet Hamdi Aksekili, *İslam Dini Fitridir*, İstanbul, Evkaf-ı İslamiye Matbaası, 1341 [1925], p. 3 (*Maarif Nezareti Telif ve Tercüme Encümenince mazhar-ı takdir olmuştur*).

⁵¹ *Ibid.*

⁵² *Ibid.*

written by İsmail Hakkı perpetuates the utilitarianist approach to the Islamic school knowledge⁵³. The forms of worships, such as fasting, pilgrimage and alms-giving were related from the same perspective in terms of their use, but especially for social life rather than emphasizing the personal gains as proposed in the texts of the Constitutional years. The author emphasized the sociological use of Islam. For example, people returned from pilgrimage with an understanding of life regarding trade, agriculture and arts. They brought a lot of new useful experiences to the homeland⁵⁴. Alms-giving helped to secure society with social help to needy people. Evils such as theft and robbing and killing could be eradicated, the soul and property were given guarantee⁵⁵. The scope of religious education, which was considered as the quintessence of the educational philosophy, reveals that the Unionist government opted for Islamic trajectory rather than the vulgar materialism of some liberal Unionists such as Abdullah Cevdet for whom «modernity entailed the birth of a society devoid of all unscientific characteristics»⁵⁶. The adaptation of a more secular discourse was not yet adapted after the curriculum change in 1926, the year that the reformers in the Republican Period altered the education policy completely⁵⁷. The disagreements between the modern science and religion seem to remain latent in the political agenda until the end of the 1920s in the Republican period.

The Articulation of the Moral Depression: Reports from the Provinces

The mail traffic between the ministry and the directors of schools in provinces show that the worry of reforming the religious knowledge and education

⁵³ İzmirli İsmail Hakkı, *Din Dersleri*, İstanbul, Kütüphane-i Hilmi, 1927.

⁵⁴ *Ibid.*, p. 94.

⁵⁵ *Ibid.*, pp. 115-116.

⁵⁶ M. Şükrü Hanioglu, *Blueprints for a Future Society: Late Ottoman Materialists on Science, Religion and Art*, in *Late Ottoman Society: The Intellectual Legacy*, ed. by E. Özdalga, London-New York, Routledge-Curzon, 2005, pp. 28-116, in particular p. 89.

⁵⁷ One of the most explicit change of content is observed in Muallim Abdülbaki's and Hilmi's textbooks published in 1927. Muallim Abdülbaki's textbooks published in 1927 exemplifies the turn in textbooks towards a national-religion agenda. Islam is diverted into the national religion. These titles from his books of various grades depict the change very well: «The Religion of Present Turks, not Interfering Other's Beliefs, Islam Forbids Asceticism, Religious Hypocrisy and Deceitfulness, Turks are the Strongest among Muslim Nations, Every Nation Addresses to God in Its Own Language, Reason is Superior to Anything in Islam». İbrahim Hilmi, *Türk Çocuğunun Din Kitabı*, İstanbul, Kütüphane-i Hilmi, 1928) (*Sade bir tarzda İslam dinini öğretir. Maarif Vekaleti Milli Talim ve Terbiye dairesinin 15 Eylül 1927 tarihli 154 numaralı kararıyla ilk mekteplerin dördüncü sınıfına kabul edilmiştir.*); M. Abdülbaki, *Cumhuriyet Çocuğunun Din Dersleri*, [İstanbul], Tefeyyüz Kütüphanesi, 1928-1929) (*Maarif Vekaleti Milli Talim ve Terbiye Dairesinin 23-VI-1928 tarihli ve 88 numaralı kararıyla ilk mekteplerin dördüncü ve köy mekteplerinin üçüncü sınıfları için kabul edilmiştir.*)

occupied the Ministry of Education. The archives of the Ministry reveal that religious instruction was treated specifically. In the documents the Ministry tried to evaluate the quality of the religious instruction from the first grade to the twelfth grades, which covered elementary, secondary and high school levels. The questions suggested to the schools in Istanbul and the provinces were as follows:

1. What do you think about the subjects of the course? Is the number of classes enough? Is the proportion of the hours to each grade proper?
2. Are the subjects for each grade appropriate for the age and level of students? If not, how could they be altered and which subjects should be taught?
3. Which methods did you use in each grade to teach this course? What kind of difficulties have you encountered? What is your expectation about the success of students?
4. Which books have you used this year? What is your opinion about these sources?⁵⁸

The questions were asked to estimate the congruence of the subjects in religion courses regarding the levels of students and the methods used. Moreover, the existing textbooks were evaluated accordingly with the experiences of teachers. The documents demonstrate that this method of questionnaire to get the ideas and experiences of teachers was only done for the religious education. It is understood that the ministry aimed to direct religious teaching by including the views of schoolteachers of «Religious Knowledge» (*Malumat-ı Diniye*) course. The answers of these teachers from almost all provinces are available in the Ottoman archives. These reports about religious education can illuminate the quality of education in three respects: The methods, the selection of subjects in religious education, and the evaluation of textbooks as materials of the course.

The methods reported by the teachers generally consist of asking questions and making students answer, summarization of the subject by the teacher, introducing the subject in the beginning of the class, making students tell their own experiences of learning. Some teachers emphasized that they taught some practices such as ablution by dramatization. It is understood that teachers did not have different views how to develop new methods. All of the teachers repeated the same sequence in which they introduced the subject orally, and then they directed students to the textbook, made each student read a part, and asked questions to check their understanding.

The evaluation of textbooks by teachers demonstrates that the central policy of unifying the school knowledge was not effectively executed due to several reasons. First, some teachers noted that they used no written text in the first grades of elementary school. The reason for this was shown as the lack of textbooks properly prepared and written in clear Turkish for this level. A teacher from Yozgat Sultani School regretfully stated that «the shortage of textbook has

⁵⁸ BOA, MF. TTD, 63/16/22.

ruined education»⁵⁹. The reports revealed that the distribution of textbooks to the rural areas was not successfully carried out⁶⁰. The teachers who could not acquire any textbooks stated that they used their own compilation of notes, which they could submit for the check of the ministry⁶¹. Those teachers who followed a certain textbook used Halim Sabit Efendi's and Hafız Nuri's textbooks which seemed to be the most widespread obtainable sources in the periphery. At the secondary school level, the most referred to textbook was Hacı Zihni Efendi's. Yet, it was generally criticized for being above the level of the students, not being written as a textbook, using a complex language and covering the subject without filtrating according to the levels of the school students.

Textbooks were discarded by teachers not only because of the distribution problems, but also due to quality. It is also discerned that some teachers did not follow a textbook since the existing textbooks did not cover the subjects in the program. Moreover, even if the subjects were covered, teachers complained that the substantial textbooks did not comprise a sophisticated point of view that had an analytical discourse comprising both Islamic and scientific knowledge, which were popularly and unproblematically reconciled in the period⁶².

Another remarkable demand among the answers of the teachers involved adding subjects about religious sects (*mezhep*)⁶³. A teacher from Aleppo stated that the textbooks of religion were not sufficient enough for his Arab students, and for this reason he had given up following a book. Instead, he noted that he focused on reasoning alongside pursuing the knowledge memorized from the books⁶⁴. Ahmed Hamdi from Bitlis articulated the problem arising from the state policy of orthodox (*Sunni*) Islam in teaching religion⁶⁵. He stated that a textbook considering the *Şafii* sect of Islam would encourage people more to demand formal religious education in schools. He proposed that textbooks should be written in two columns that gave information about the *Şafii* sect side by side the orthodox Islam. What is more, he noted that the success of students was low due to the trouble regarding the religious sects although he personally tried to cover the lack of information about the *Şafii* sect. Ahmet Hamdi did not neglect to add a note at the bottom that he was a *Sunni* Muslim. He mentioned two textbooks penned by Hafız Nuri and Ahmet Ziyaeddin, both of which will be analyzed contextually below⁶⁶. A third textbook is understood to have been a locally published book. This shows that the uniformity in regulating textbooks and a central control still had not been accomplished by the state.

⁵⁹ BOA, M.F.TTD, 63/16/32; BOA, M.F.TTD, 63/16/37.

⁶⁰ BOA, M.F.TTD, 63/16/44.

⁶¹ BOA, M.F.TTD, 63/16/6 (25 Şubat 1329 [1913]).

⁶² BOA, M.F.TTD, 63/16/6, (25 Şubat 1329 [1913]); BOA, M.F.TTD, 63/16/16; BOA, M.F.TTD, 63/16/17.

⁶³ BOA, M.F.TTD, 63/16/27.

⁶⁴ BOA, M.F.TTD, 63/16/29.

⁶⁵ BOA, M.F.TTD 63/16/13.

⁶⁶ BOA, M.F.TTD, 63/16/18 (17 Mart 1330 [1914]).

Religious education in the eastern regions of the country also was discussed in the parliament. The session in which the discussion over the budget of education was held displays the worries about religious education which was thought to be ignored by the government⁶⁷. The Ministry of Education was called to pay more attention to religious education in general and to send teachers who were well trained on religious subjects to Kurdistan⁶⁸.

There was a consensus among teachers on the addition of *jihad* as a religious subject to the elementary textbooks⁶⁹. Other subjects recommended to be added to the program were the issues of debt, poverty and sanitation. The subjects to be removed from the program were the tiresome and detailed regulations about weddings and the regulations of religious performances led by imams⁷⁰.

Generally, the teachers gave detailed comments on the school subjects such as hadith (*hadis*), commentary (*tefsir*) and Islamic philosophy (*kelam*). These subjects were taught in the upper grades of secondary schools. Since the elementary books were written by filtrating from these subjects, the comments laid out in these documents are informative on the general situation of religious education. A common point in all answers touched upon enriching the religious subjects with modern knowledge accumulated in the areas of sociology, economics, politics, morality and natural sciences. El- Hac Tevfik, a teacher of *Ulum-u Diniye* (religious sciences) in Mamüratilaziz (Elazığ) Mekteb-i Sultani proposed to teach religious courses such as hadith (*hadis*), the study of Prophet Mohammed's life (*siyer*) and commentary (*tefsir*) within comparisons to morality, economics, civilization and politics in order to explore the truths of religion and prove its credibility⁷¹. He emphasized that the reason behind Islamic regulations and their benefits to 'the world' life also should be revealed with an emphasis on social and personal gains. He thought that it would be useful to teach a *Kelam* course («Islamic Philosophy») in comparison with modern and ancient philosophy. The challenge of religious knowledge over the modern epistemology emerged as one of the clear objectives in proving Islam's superiority and credibility still after centuries. Another concern was to extinguish the moral depression, the doubts and hesitation about religious beliefs and practices, by maintaining a method that allowed students to question religious beliefs openly and deeply⁷².

A teacher from the Sultani School in Üsküdar mentioned a parallel idea in that the best aim should be to provide to students that the principal regulations, orders and obligations in Islam did not contradict the positive sciences (*fünun-u*

⁶⁷ Şükrü Bey, *Umumi Bütçe, Meclis-i Mebusan, Maarif*, «Tedrisat Mecmuası (Ameliyat ve Tatbikat Kısım)», vol. 4, n. 27 (18 Haziran 1916), p. 108.

⁶⁸ BOA, MF.TTD, 63/16/18 (17 Mart 1330 [1914]).

⁶⁹ BOA, MF.TTD, 63/16/45; BOA, MF.TTD, 63/16/48.

⁷⁰ BOA, MF.TTD, 63/16/47; BOA, MF.TTD, 63/16/57.

⁷¹ BOA, MF.TTD, 63/16/6 (25 Şubat 1329 [1913]).

⁷² BOA, MF.TTD, 63/16/6 (25 Şubat 1329 [1913]).

müspete). Thus for him, the religious knowledge should be based on positive and scientific grounds. He regretted that the leading textbooks lacked such a point of view⁷³. A teacher from the Sultani Mektep in Trabzon explained that he made students reflect on the benefits of Islam regarding this world as well as the Hereafter⁷⁴.

A reporter from Edirne commented on the purpose of the new program. The first period of Sultani, which corresponded to the primary school, focused on the teaching of forms of worships (*ibadat*), while the second period (secondary school) taught the articles of belief (*akide*)⁷⁵. To the reporter, the program did not yield good results because the teaching of religious beliefs especially in the upper grades did not satisfy students who were confused with the modern science in methodical, experimental and theoretical ways. The subjects of religion were taught but they could not be proven efficiently by the teachers of religion depending on their insufficiency in the positive sciences⁷⁶. To obtain good results from religious education the subjects of beliefs in Islam needed to be inculcated before the students were exposed to the natural sciences. Only in that way could the belief of the students survive and resist the positivist worldview instilled intensely at secondary school⁷⁷.

A teacher from Yozgat also articulated that he had taken into consideration the material gains of all of the orders of Islam. He wanted to extract the worldly side of religion, which he considered contributed to social and personal problems⁷⁸. As a result, one of the main goals in the program must be the demonstration of proofs that Islam was not a hindrance to progress according to the teachers of religion in the Empire.

The comments of the teachers mostly concentrated on some serious debates especially within the evaluation of the higher grades. While the teachers of the lower grades mainly stated overall comments about the hours, methods and subjects, the teachers of higher grades went further than commenting and criticized the program and policies. Mehmet Tevfik, at the Kabataş Sultani School, teaching students from the eighth to twelfth grades, criticized the exaltation of scientific knowledge while religion was discredited. Believing that not Islam but some *hurafat* (superstitious beliefs) in the disguise of religion were the cause of backwardness, he defended Islam, which was the only protection against the ‘degeneration’ of secularization in the pious societies⁷⁹. He agreed with the common conviction which emphasized Islam’s universality, the harmony drawn

⁷³ BOA, MFTTD, 63/16/16.

⁷⁴ BOA, MFTTD, 63/16/17.

⁷⁵ The translation of the terms are borrowed from S.L. Douglass, M.A. Shaikh, *Defining Islamic Education: Differentiation and Applications*, «Current Issues in Comparative Education», vol. 7, n. 1 (Teachers College Columbia University, 2004).

⁷⁶ BOA, MFTTD, 63/16/56-57 (20 Sefer 1328 [1912]: 18 Şubat 1325 [1909]).

⁷⁷ BOA, MFTTD, 63/16/58-60 (20 Sefer 1328 [1912]: 18 Şubat 1325 [1909]).

⁷⁸ BOA, MFTTD, 63/16/44.

⁷⁹ BOA, MFTTD, 63/16/34.

between the orders of Islam and the modern sciences. He advised for example, to write about the *taharat* (cleaning) issue by presenting the worldly gains with respect to the natural and social sciences in the textbooks⁸⁰.

A teacher of the Istanbul Sultani School, Mesud, said he found the new program of *Kelam* course constructive to strengthen Islamic knowledge of *Kelam* so as to «combat against and triumph over the present materialist and naturalist philosophy», which led the youth to degeneration⁸¹. However, he warned that the present program of *Kelam* course left teachers in enormous hardships since the commission which had been established to form a book had not produced a work. He proposed the foundation of a new commission, consisting of Ahmet Naim, Ismail Hakkı, Abdüllatif Efendi from the university and some teachers in the Sultani schools for the goal of making up a new *Kelam* textbook⁸².

The textbook selection of the Writing and Translation Office concluded its report on the written samples in 1915: «since there was no work meeting the necessary conditions among the submitted textbooks, they were not worthy of approval; however, until a work appropriate to (our) demands is compiled, [...] the books of Erşed and Ahmet Ziyaettin are counted favorable because they are better ordered and well-written comparatively»⁸³. It is evident that the commission was not satisfied with the existing textbooks. It would be great to know on what pretexts some books were returned; however, the archive renders very limited knowledge on this question. What is clear is that most of the textbooks lost the chance of publication due to physical conditions such as the complexities of organization of the subjects and titles inside the book, incomprehensive language use, lack of illustrative figures, and pictures.

It is important to see in what discourses the religious instruction, which turned into a Constitutional right in 1908, were reproduced within the scientific modes of thought and practices in daily life. The knowledge of the material world (the secular or scientific point of view) and the other world (the religious indoctrination) came into conflict through the lines of the primary school textbooks. The clashes and reconciliation of the two world views and epistemologies will be discussed below through the multitude of primary school textbooks written by different authors for different levels. Twenty-nine school textbooks written between 1908 and 1928 for the course of *Malumat-ı Diniye* («Religious Knowledge») are examined with a contextual analysis to characterize the state policy on teaching Islam. The textbooks conflict with the classical texts of Hamidian period which explain religious obligations through merits and sins in the religious system; in what follows how textbooks produced following

⁸⁰ BOA, MF.TTD, 63/16/35.

⁸¹ BOA, MF.TTD, 63/16/39.

⁸² BOA, MF.TTD, 63/16/39.

⁸³ BOA, MF.MKB, 210/56/1 (1333 [1917], M, 27).

the Constitutional reform developed a modern discourse which reinterpreted and formulated the religious duties so that a scientific verification of religious knowledge was reached will be discussed.

Putting Religious Practices in Modern Forms

The official name of the course according to the curriculum text of 1913 was «Knowledge of Religion», but the textbooks do not have a uniform title. Some common titles of textbooks are *Religious Knowledge for Children*, *Comprehensible* ('Muvazzah') *Religious Knowledge*, or *Practical* ('Ameli') *Religious Knowledge* and *Scientific Religious Knowledge for Students*. These titles transform into *The Religion Book of the Turkish Child* and *The Religion Book of the Republican Child* in the last years of the 1920s. Compared to the other social science textbooks, religious instruction seems to have had no physical attractiveness. Pictures, photos or illustrations were used rarely. The only textbook that included multitude of pictures was Asim and Cevad's *The Religion Book of the Anatolian Youngsters* in which seventeen pictures were used in thirty-two pages⁸⁴. In terms of page and paragraph order, most books lack a favorable appearance. One of the authors articulated his regrets about the quality of textbooks as such:

When I started to print the textbooks, I had to read and go over the books, of course. The situation was so deplorable that I wanted to cry. Thousands of books were printed but each was a copy of the other. Then I pitied this nation. I understood why education cannot progress and the sons of the country remain ignorant⁸⁵.

In terms of the narratives in the textbooks, the explication of the subjects was provided with simple and concrete examples. In parallel, the cover pages of the books emphasized their best quality as simplicity and clarity, which made the knowledge of religion compatible with the perception of children by language. The language of some books was found «even difficult for a secondary school student to understand the meanings in a primary school textbook»⁸⁶.

As for the contents of these books, they followed the same circle, starting with meaning of *shahada*⁸⁷. It was followed by the explanation of the obligatory duties such as ablution (*abdest*), prayers (*namaz*), fasting (*oruç*), alms-giving

⁸⁴ Mehmet Asim, Ahmed Cevad, *Anadolu Yavrusunun Din Kitabı* (Devre-i Ula Birinci Sene), İstanbul, Matbaa-ı Amire, 1332 [1916].

⁸⁵ Tüccarzade İbrahim Hilmi, *Müslüman Çocuğun Yeni İlmihali*, İstanbul, Mahmut Bey Matbaası, 1326 [1910] (*Küçük çocuklara akaidi talim eder. Tertibi güzel, yazılışı sadedir*).

⁸⁶ *Ibid.*

⁸⁷ *Shahada* is declaring that one witness there is no other God but Allah; and Muhammed is the subject and prophet of Allah.

(*zekat*) and pilgrimage (*hac*) in the program. These subjects went parallel to the teaching of reading the Quran at the elementary level. The curriculum defined the titles of the subjects, yet it did not go in detail in which perspective the content would be situated. This left the pedagogical limitation of the subjects to the teachers. For example, a notification states that the compulsory (*farz*) duties of ablution or prayers would be taught only as much as the children were able to understand. On the other hand, there was another reminder to teachers that the forms of such acts as worships, prayers, ablution, and fasting should be taught with proper examples from the life of the Prophet Muhammad. Another warning described how the subjects of religion would be adapted to female students, for in Islam the forms of worships required rules for females different from those of for boys. Thus the program drew a teaching of Islam on the basic practices and beliefs. The five obligatory duties of Islamic practice, which are *shahada*, prayer, fasting, alms-giving and pilgrimage, and the essentials of Islamic belief – which are the belief in the oneness of God, the belief in the Prophets and holy books, Angels, the Hereafter and Destiny – were taught. It is understood that the pillars of Islam and Islamic belief made up the main agenda in primary schooling.

The real effect the Constitutional regime created is observed in the discourse of the textbooks. The increase in the number and authorship of religion textbooks indicates the quest for new textbooks compared to the limited variety of books in the previous periods. Actually the books in the previous periods had not been different in the subjects covered, yet the textbooks of the Second Constitutional Period brought up a new methodological and philosophical perspective. The new knowledge was based on methodological reason. The Islamic belief and practices were explained with the help of reasoning instead of memorization. Thus the new knowledge was conveyed in a sequence of logic. The philosophical insight of the textbooks brought up and pushed the worry of ‘the world’ in contrary to the worries of Heaven and Hell in the Hereafter⁸⁸.

What is interesting here is that the curriculum of the religion course does not have any explicit encouragement for teachers for explaining the Islamic belief and practices with reasoning⁸⁹. Instead, teachers were cautioned to find examples from religious texts, such as the practices and life of the Prophet. However, the new trend appeared within the textbooks tackled the question of adapting religion to the material world more than the Hereafter. On the subject of «believing in the Hereafter» even, they were told to repeat warnings which told «yes, this world is temporary and not eternal for any human being. Yet every man has to work with his honor as if he is going to live forever. It is a sin

⁸⁸ The existence of God, the creation of Adam, the prophets in order, necessities of Islamic belief, the concepts of *farz*, *sünnet*, *mekruh* and *mübah* in worshipping. The subjects are not held with questions or reasoning. n.a., *Zükür Rüşdiye Mekatibine Mahsus Birinci İlmihal* (n.p., 1318 [1902]).

⁸⁹ *Mekatib-i İptidaiye Ders Müfredatı*, İstanbul, Matbaa-i Amire, 1329 [1913].

committed against God and one's soul to sit and not work and lead a life of pleasure and joy since the world is not eternal [...] Our ancestors say a life of eight days require a livelihood of nine days»⁹⁰.

Ameli Malumat-ı Diniye, written by Hafız Nuri⁹¹, a teacher in a rushdiye school in Beşiktaş, described the religion of this world clearly. Meant for the first grades of primary school in 1916, it revealed the true Islam which regulated life in this world. Hence, religion's intervention in the world affairs was underlined:

The Quran commands not lying, obeying one's parents, helping the poor, being patriotic, being educated, and being raised as a true man. There are also all bad actions, such as to betray, to escape from military service, to be ignorant, to disobey the parents, not performing prayers, and not fasting⁹².

The selection and composition of orders indicates the effort to bring the worldly side of religion to the attention. The Quran was presented as a guide responding to the social and economic ills of the society. The precepts of the religion quoted above indicated Islam's contribution or direct influence with its solutions against disorder. These precepts made up what religion consisted of and what were to be demanded by either family or the state. The relevance of these moral attitudes, such as loving the homeland, obeying one's parents and state to the world affairs was already evident. This effort of indicating religion in cooperation with profane values and realities went beyond some evident cases in the textbooks.

Treating the sacred book as a source of solutions for worldly affairs goes hand in hand with a discourse that relied on science to legitimize the five principal orders of Islam. To convince students of the necessity of these religious duties in the twentieth century, a worldly perspective was developed with scientific truths which showed how these forms of worship served this world. The practice of religion was brought to the attention of children and the links of this world with the religious system were established upon worships (*ibadat*) of ablution, prayers, fasting, alms-giving and pilgrimage, which are the five basic orders of Islam, taught in the elementary school.

This gives the idea that the modern world view especially was produced as a result of the pedagogical reproduction of religious values. The pedagogical method of teaching abstract things with concrete examples led the new discourse in religious instruction. The spirituality in the religious system was made visible

⁹⁰ Tüccarzade İbrahim Hilmi, *Müslüman Çocuğun Yeni İlmihali*, cit., p. 11.

⁹¹ Hafız Nuri, *Ameli Malumat-ı Diniye* (Devre-i Ula, Birinci Sene), Dersaadet, Şirket-i Mürettebiye Matbaası, 1332 [1916] (*Hissiyat-ı masumane ile pak ve münevver olan evlad-ı muhdimin efkâr-ı İslamiyelerini tenvir ve takviyeye, meleke ve mümareselerini tesrie ve teshile medar olacak vazifelerini dahi tertip olunmuştur*).

⁹² *Ibid.*, p. 20.

with respects to its benefits for the material world. The discourse that converted the religious practices into worldly benefits served to make the religious system understandable and useful in the mind of the child.

Sanitation and Physical Education

Ablution, which requires the cleaning of the hands, mouth, nose, face, arms and feet, is the first step in beginning the practice of worship in Islam. It is a must in the preparation for prayers. Hence this necessity of washing hands and body was seen as representation of hygiene in Islam, which went prior than the discovery of microscope and microbes. *Comprehensible Religious Knowledge* described ablution as the best weapon against illnesses. Reforming ablutions five times a day yielded powerful and healthy bodies⁹³. Islam gave life since it ensured sanitation: «Luckily, I am Muslim and there is ablution»⁹⁴.

Ablution ensured sanitation, and the prayers following it refreshed the body as it helped the digestive system. Different authors presented the subjects of ablution and prayer within a discourse which was supposedly thought to be convincing due to the scientific explanation. The students in the first decade of the twentieth century were introduced to a new point of view as follows:

Prayers (*namaz*) has lots of benefits for our body as well as its profits in the Hereafter... The first prayer (morning) activates the body which has slept throughout the night. It gives strength and agility to us [...] The children who perform the first prayer can understand their classes better. Such students always achieve the first rank in the classroom. The second (midday), third (afternoon) and fourth (evening) prayers refresh our bodies; the ablution cleans hands, faces and feet. It gives coolness to our body. The fourth prayer whets our appetite. The last prayer (late evening) helps us digest our meal. Prayers serve the progress of man both spiritually and materially. The prayers make us think God. As someone contemplates God, he remembers his sins and faults⁹⁵.

⁹³ Muallim Erşed, *Muvazzah Malumat-ı Diniye*, İstanbul, n.p., 1333 [1917] (*Maarif-i Umumiye Nezaret-i Celilesince tanzim olunan son müfredat programına tevfikân tertip edilmiş ve nezaret meşarileyh tarafından bircümle mekatib-i iptidaiyede tedarik üzere kabul buyrulmuştur. Mekatib-i iptidaiyenin birinci sınıf talebesine mahsustur*), p. 18. The book consists of 32 pages since it is written for the first grades. The language and narration is simple and clear in parallel to the standards put by the Copyright and Translation Office. Some titles from the book are as follows: Being a Muslim, the Quran, ablution, prayers, fasting, almsgiving, pilgrimage, the greatness of Islam. The book uses Tanrı for Allah throughout. For use of “Tanrı” similarly. Küreli Ahmet Ziyaettin, *Malumat-ı Diniye* (Dördüncü Kısım), İstanbul, Matbaa-i Şems, 1333 [1917], p. 8.

⁹⁴ Hafız Erşed, *Malumat-ı Diniye* (Devre-i Mutavassita, İkinci Sene), Dersaadet, Kanaat Matbaası, 1338 [1922], p. 2.

⁹⁵ Tüccarzade İbrahim Hilmi, *Müslüman Çocuğun Yeni İlmihali*, İstanbul, Mahmut Bey Matbaası, 1326 [1910] (*Küçük çocuklara akaidi talim eder. Tertibi güzel, yazılışı sadedir*), pp. 13-17; Nazım [İçsel], *Ameli Malumat-ı Diniye*, İstanbul, Kütüphane-i İslam ve Askeri, 1335 [1919] (*Zükür ve inas mekatib-i sultanienin beşinci ve mekatib-i iptidaiyenin altıncı senelerinde tedarik*).

Another point about prayers focused on the movements of body while praying. As clearly stated by Erşed, «prayers are at the same time physical education»⁹⁶. In Nuri's text, the benefits of prayers are illustrated more concretely with the movements of body, step by step:

The benefits of the five prayers for our body and life are too many to appreciate properly. What a good exercise is standing while performing prayers! [...] How useful is bending for the waist which holds all our power! While putting your face on the floor, your waist, thighs, knees, feet, hands, arms, elbows, shoulders and fingers open and close widely. The blood circulates better [...] Our stomach easily refines the food we have consumed [...] The sports, which are to strengthen human power, are in no way able to give us these benefits of prayers⁹⁷.

Prayer, as one form of worship in Islam, was introduced to the readers in a modern context. The revival of physical education in the nineteenth century, which became a crucial part of the modern pedagogy, found its religious counterpart in the worship physically performed⁹⁸. The connection set up between the performance of prayers and gymnastics indicated a trial of adapting one to the other: Islam and modern science. The point of view which suggested the conformity with modern science was sometimes accompanied by a language of challenge. The statement above that «the sports which are to strengthen human power are in no way able to give us these benefits of prayers», conveys a conviction of the superiority of Islam over modern science⁹⁹.

The general tendency of the textbook authors who explained the merits of Islamic practices to the modern life and its contribution to the individual, society and stated through terms such as hygiene, gymnastic, dieting, fraternity and social policy is not followed in the book of Eğribozi¹⁰⁰, published in 1913. He did not need to explain and illustrate religion for psychological, sociological and economic perspectives. The religious context of punishment, reward, different degrees of obligations (*farz, sunnet, vacip*) dominated the narration

olunmak üzere maarif nezareti tarafından kabul edilmiştir. Devre-i Aliye, İkinci Sene), p. 7.

⁹⁶ Muallim Erşed, *Muvazzah Malumat-ı Diniye*, cit.; Tüccarzade İbrahim Hilmi, *Müslüman Çocuğun Yeni İlmihali*, cit., pp. 13-17; Nazım [İçsel], *Ameli Malumat-ı Diniye*, cit., p. 21.

⁹⁷ Hafız Nuri, cit., pp. 25-26.

⁹⁸ Yiğit Akın, "Gürbüz ve Yavuz Evlatlar": *Erken Cumhuriyet'te Beden Terbiyesi ve Spor*, İstanbul, İletişim, 2004, p. 103.

⁹⁹ Hafız Nuri, *Ameli Malumat-ı Diniye*, cit., pp. 25-26.

¹⁰⁰ Although the author put some remarks on the necessity of a new interpretation of religion in the present day, he prefers not to conform to modern discourse of presenting religion. Eğribozi Ali İrfan, *Malumat-ı Diniye, Birinci Kısım*, İstanbul, Şirket-i Mürettebiye Matbaası, 1329 [1913] (*Maarif Nezaretinin en son programına tevfikân gayet açık ve sade bir lisan ile muharrer olup nevrestegan-ı vatana hayat-ı diniyelerini talim eyler*). The introductory note states that it is written in a clear and purified language. The contents comprise such titles: *The existence of God, His Greatness, His Prophets, His Orders, Orders of Prophet Muhammad, Prayers*. There was no note about which grade it was written for. Yet, the number of pages was limited to 40, and it is understood that it was intended for the first grades of elementary school.

and without emphasis on illustrating these subjects with ration and modern innovations. Contrary to the science and reason based discourse, he emphasized the contribution of prayer to the human psyche, which was educated through keeping people away from arrogance and pride. He was more wary about using the practical and secular benefits of worships in his teaching of the religious subjects.

Except for Eğribozi's classical view, the overwhelming tendency of the textbooks in the Second Constitutional Period proposed an Islam approved by what modern science had discovered; however, this relationship was founded upon religion's validity and sufficiency to the modern, not upon an inferior provision. The scientific discourse used in explaining the worship, which was theoretically performed to gain the consent of God in the classical discourse of Islamic teaching show the effort of 'justification' of religion relying on its worldly part that appealed to human reason. This is, in a sense, a defense of religion against the discredit of beliefs which was articulated more openly by some intellectuals affiliated with the radical Westernist block in the Second Constitutional period. Although one of the probable results of this scientification of religious knowledge could be the secularization of religion, this seems not exactly to have been the intention of the authors since they admonished the students that worship was only made for God, just after these benefit (*faide*)-reason (*hikmet*) considerations.

Dieting

Nazım's textbook *Ameli Malumat-ı Diniye*¹⁰¹ 1917 dated drew the same line of scientification regarding fasting. The textbook, written for the upper grades of primary school, adapted the modern point of view on religion, though only partly. Fasting for one month was recounted parallel to dieting as a medical application to the body: «there is a benefit of fasting in respect to the protection of health. It is a kind of diet that gives power to the stomach and intestine. It removes many illnesses»¹⁰². Fasting was mentioned similarly in earlier book by

¹⁰¹ Nazım [İçsel], *Ameli Malumat-ı Diniye* (İptidai, Altıncı Sene), [İstanbul], Kütüphane-i İslam ve Askeri, 1335 [1919] (*Ziükür ve inas mekatib-i sultanienin beşinci ve mekatib-i iptidaiyenin altıncı senelerinde tedaris olunmak üzere maarif nezareti tarafından kabul edilmiştir. Devre-i Aliye, İkinci Sene*).

¹⁰² Nazım [İçsel], *Ameli Malumat-ı Diniye*, [İstanbul], Kütüphane-i İslam ve Askeri, 1333 [1917] (*En son programa göre tertip edilmiştir. Devre-i Aliye, Birinci Sene. Ziükür ve inas mekatib-i sultanienin beşinci senesiyle mekatib-i iptidaiyenin devre-i aliye birinci senesinde tedaris olunmak üzere Maarif Nezareti tarafından kabul edilmiştir*).

the same author: «Fasting is very meritorious, yet it has also benefits. First of all, it is proper for the health to keep the stomach empty once a year»¹⁰³.

Nuri presented fasting directly with its worldly connotation in his choice of title: *Fast for being healthy!* ('*Sıhhat için oruç tutun!*'), which directly related the worship to the worldly result it rendered. He continued to illustrate the issue, elaborating on the human anatomy and fasting as follows:

As prayers make our outer body rest, fasting makes the inner body rest and refresh. It cleans our digestive organs. It makes us fit, strong and agile¹⁰⁴.

The reproduction of religious knowledge with scientific terms reverberated throughout Erşed's textbook in the same approach: «One who fasts carries out what God orders him to do and makes a useful diet. It treats him if he is sick. If not, his body and stomach find strength»¹⁰⁵.

A contradictory point of view was again observed in Eğribozi's book, which viewed fasting in the classical discourse. His presentation indicated the contrast between the old and new perspectives and it showed the novelty of the new tendency. Fasting was approached with its benefits; however, these benefits would take the person closer to the other world rather than this world:

[...] not eating and drinking are characteristics of angels. For this reason, fasting puts human beings closer to the state of angels. It purifies man, pacifies him, makes him more compassionate; makes him contemplate the Hereafter rather than the world. It calms the worldly ambition and greed; it decreases the interest in worldly affairs. It makes man approach God and keep away from the devil¹⁰⁶.

The point of view in Eğribozi's text did not envisage a point that could indicate the use or return of religion in the practical life. The old perspective in his teaching Islam was blamed as the 'wrong' religion which removed the love of the world and implanted the notion of the other world as one reality, as presented in the opinions of Religious Knowledge teachers in the archive reports. Most intellectuals and educators of the period, both in periodicals and textbooks pointed out the methods not to calm but to arouse worldly ambition and greed as the goal of the new insight of religion. The fact that Eğribozi's book

¹⁰³ Tüccarzade İbrahim Hilmi, *Müslüman Çocuğun Yeni İlmihali*, İstanbul, Mahmut Bey Matbaası, 1326 [1910], p. 18.

¹⁰⁴ Hafız Nuri, *Ameli Malumat-ı Diniye*, cit., p. 29.

¹⁰⁵ Muallim Erşed, *Muvazzah Malumat-ı Diniye*, İstanbul, n.p., 1333 [1917] (*Maarif-i Umumiye Nezareti Celilesince tanzim olunan son müfredat programına tevfikân tertip edilmiş ve nezaret meşarileyh tarafından bilcümle mekatib-i iptidaiyede tedris edilmek üzere kabul buyrulmuştur. Mekatib-i iptidaiyenin birinci sınıf talebesine mahsustur.*), p. 24; Muallim Erşed, *Muvazzah Malumat-ı Diniye*, İstanbul, n.p., 1334 [1918]; H. Erşed, *Malumat-ı Diniye*, (Devre-i Aliye, Birinci Sene), Dersaadet, Kanaat, 1338 [1922], p. 3.

¹⁰⁶ Eğribozi Ali İrfan, *Malumat-ı Diniye, Birinci Kısım*, cit., p. 21.

was approved by the ministry demonstrates that a strict unification policy was absent regarding the construction of the school knowledge through textbooks in this period.

Distribution of Wealth

The alms-giving requisite was interpreted and presented as means of providing the social justice in society¹⁰⁷. The concept of equality was treated attentively between the liberal philosophy and religious obligations:

God has given the blessing to His subjects equally. In reality men are equal in their nature, yet in terms of their livelihood they differ. If everyone were equal by property and richness, then working would lose its meaning. For this reason, the rich need the work of the poor and the poor the help of the rich. The poor need to work for a living, as the rich have to think about the hardships of life for the poor and they have to give the alms of their properties both because of a religious obligation and as a humanitarian necessity¹⁰⁸.

Another author called for becoming rich in order to give alms by attracting the attention to the backwardness and poverty of Muslims. The two were given as two ills of the society. Erşed placed the benefits of the country, the national wealth and the consent of God in the same line:

I like helping the poor. I will try to be rich for this reason. I will gain the consent of God by helping the poor through alms-giving, donating the useful foundations of my nation and the homeland after becoming rich¹⁰⁹.

O! How nice is our religion! It does not ignore the poor. It pities the poor... Thank God, we are Muslim. We will work and become rich. We will help the poor and make the poor kids happy¹¹⁰.

Eğribozi, who restrained explaining and presenting worship on a worldly base, drew a parallel discourse with the above-mentioned modern presentation

¹⁰⁷ Tüccarzade İbrahim Hilmi, *Müslüman Çocuğun Yeni İlmihali*, İstanbul, Mahmut Bey Matbaası, 1326 [1910] (*Küçük çocuklara akaidi talim eder. Tertibi güzel, yazılışı sadedir*), p. 19.

¹⁰⁸ Nazım [İçsel], *Ameli Malumat-ı Diniye, Kitab-ı Hac Zekat*, [İstanbul], Matbaa-i Hayriye ve Şürekası, 1331 [1915] (*Son programa göre tertip edilip mekatib-i iptidaiye sınıflarında tedris edilmek üzere Maarif Nezaretince kabul edilen ulum-u diniye külliyyatının sultani sekizinci sınıflarına mahsus kısmıdır*), p. 79.

¹⁰⁹ Muallim Erşed, *Muvazzah Malumat-ı Diniye*, İstanbul, n.p., 1333 [1917] (*Maarif-i Umumiye Nezareti Celilesince tanzim olunan son müfredat programına tevfikân tertip edilmiş ve nezaret meşarileyh tarafından bilcümle mekatib-i iptidaiyede tedris edilmek üzere kabul buyrulmuştur. Mekatib-i iptidaiyenin birinci sınıf talebesine mahsustur*), p. 30.

¹¹⁰ Küreli Ahmet Ziyaettin, *Malumat-ı Diniye* (Devre-i Ula, Birinci Sınıfa), İstanbul, Şirket-i Mürettebiye, 1333 [1917], p. 38.

of alms-giving. For alms-giving, he introduced a more secular discourse, which combined alms-giving with its social results: «no one dies of hunger, poverty and begging disappears»¹¹¹.

The Journey to Muslim Unity

Almsgiving and pilgrimage complemented the benefits of worships to the society and state. According to Eğribozi, pilgrimage was to be counted as a rehearsal of the day of the Hereafter since everybody became equal by dressing up in the same way without considering their worldly poverty or wealth. Thus no one could have a cause for superiority or self-esteem: «Everyone comes closer to God, he is forgiven and they are strengthened religiously»¹¹². Pilgrimage is pointed out with its spiritual gains; its worldly side is not focused.

However, Erşed's and İçsel's textbooks counted pilgrimage in its political and social aspects. In addition to the concepts of equality and union of Islam, the personal benefit of pilgrimage was to enjoy a journey which enabled Muslims to see different lands and people.

Pilgrimage is an important means of Islamic union. It gathers people of far geographies who are unaware of each other's situation at the same point. It strengthens the love and ties among them and it enabled them to unify their political and social interests. It makes the power of Islam and Ottomans constant. The greatest reason of pilgrimage aims at this goal¹¹³.

Hafız Erşed's textbook focused on the equalizing function of pilgrimage. While the equality and fraternity terms were corresponded to religious concepts, nationalism was blamed as a modern ill and Islam once again was presented as cure for it. Pilgrimage tells people that gender and ethnicities are of no value and Muslims are brothers to each other¹¹⁴.

¹¹¹ Eğribozi Ali İrfan, *Malumat-ı Diniye, Birinci Kısım*, İstanbul, Şirket-i Mürettebiye Matbaası, 1329 [1913] (*Maarif Nezaretinin en son programına tevfikân gayet açık ve sade bir lisan ile muharrer olup nuristekân-ı vatana hayat-ı diniyelerini talim eyler*), p. 24.

¹¹² *Ibid.*, p. 23.

¹¹³ Nazım İçsel, *Ameli Malumat-ı Diniye Kitab-ı Hac Zekat*, [İstanbul], Matbaa-i Hayriye ve Şürekası, 1331 [1915] (*Son programa göre tertip edilip mekatib-i iptidaiye sınıflarında tedris edilmek üzere maarif nezaretince kabul edilen ulum-u diniye külliyyatının sultani sekizinci sınıflarına mahsus kısmıdır*), p. 13.

¹¹⁴ Hafız Erşed, *Malumat-ı Diniye (Devre-i Aliye, İkinci Sene)*, Dersaadet, Kanaat Matbaası, 1338 [1922], p. 35.

A High School Textbook

An examination of the textbooks of upper schooling yields more complementary results regarding how religious knowledge was imposed with scientific truths. *Dini Dersler*¹¹⁵ was taken as a reference book for it was recommended for all levels of schools and the *medrasas* by the Ministry of Education. By its difficult language and the number of the pages, the textbook can be considered to have been a high school text. Worshipping and being grateful to God was taken as a rational by referring to the reason and conscience of man: «For this reason, we state that worshipping is a duty of ration and conscience. When we ask our wisdom and conscience, we understand worshipping God is a duty of human beings»¹¹⁶. According to him, the fact that worshipping was compatible to human nature and psychology confirmed this case¹¹⁷. The emphasis on human reason and psychology helped to base the divine knowledge in the scientific terms.

The author, though mentioning the relation between the world and religion did create a direct bridge between two. He counted the justification of religion with science as a threat and opposed it in his emphasis upon the principle that worshipping could only be performed for God's consent, not for a worldly benefit. This is to say that worship was not done for the reason (*hikmet*) or benefit/return (*maslahat*) behind it. They were orders that came with revelation:

Yes, the spirit and sincerity in worshipping is only reached if it is done as God's order rather than regarding its reason. Yet, this does not mean that there is no reason or return in worshipping. One should not be unaware of the reason behind the religious legislation. For this reason, some parts of the religion course program include the orders of Islam and the reason and sociological returns in it¹¹⁸.

Besides his wariness to the secularly justified religion, he disapproved of ignoring the reasoning in God's orders. The book focused on the relation of the world and religion, especially on its sociological side properly with the political context of the 1920s. Performing worship all together aroused feelings of solidarity and wiped out the social ills and evils which helped order and security to be implemented in society. «Even in ablution, which could be seen as a particular action at the beginning of praying, there are social benefits»¹¹⁹. Ablution was presented as a purifier of materialism before performing prayers. After proposing ablution in such a reason-return perspective, he once again admonished his readers to have restraint against the threats of secularization of

¹¹⁵ Aksekili Ahmed Hamdi, *Dini Dersler*, İstanbul, Amedi Matbaası, 1339 [1923]-1342 [1926].

¹¹⁶ *Ibid.*, p. 17.

¹¹⁷ *Ibid.*, pp. 18-21.

¹¹⁸ *Ibid.*, Introduction.

¹¹⁹ *Ibid.*, p. 40.

the religious knowledge: «we perform our prayers since it is a religious duty for us; no matter whether there is a reason, spiritual or material return, an instant or a long run interest or not [...] We do not think about it. And we ought not to»¹²⁰.

In addition to the consolidating power of religion, Islamic beliefs and practices supported the individual lives with their practical benefits in modern times. The author illustrated the relation between microbes and ablution practice directly.

Gentlemen! Ablution, which is essential for bringing men close to God, promises also plenty of earthly and corporeal benefits. It is of vital importance regarding physical cleanliness. Especially after the discovery of the little animals called as microbes, the significance of ablution has begun to be understood more. Before, only Muslims appreciated its importance; now the sensible non-Muslims, too, begin to appreciate it. Yes, we now know and hear that many illnesses are spread with these little creatures [...] A pious Muslim cleans his hands, which are exposed to microbes the most, through obeying the order of God, five times a day, properly¹²¹.

As noted above in the examination of the elementary school textbooks, the reconciliation between Islam and modern science was turned into a discourse challenging the secular knowledge. The relation he constructed between alms-giving and social welfare exhibits the claim of superiority of revelation over the knowledge acquired through induction:

We know certainly that there is and cannot be a law as essential as alms-giving, a compulsory donation imposed on the rich, in wiping out the social discontent, misery and improving the situation in society¹²².

According to the author modernity committed a crime against humanity. Another statement making a criticism on modern economy has presented in the following idiomatic expressions: «Who cares about the starvation of others after I have had my stomach full» and «You work and take pains; and I rest»¹²³. According to him, these thoughts were some of the sentences summarizing the spirit of the modern economy, and they were detrimental to the harmony and order of humanity since they had extinguished the existing system, which had organized the obligations of people to each other¹²⁴.

His book resembles to the formation of civics textbooks after explaining the religious subject with such a point of view. He adapted the civics subjects to an Islamic point of view, creating a discourse *vis-a-vis* the discourse purged in the civics curriculum. The 'duty' which was the key point in civics was described within religious morals: «Duty is to do the good ordered to be practiced by

¹²⁰ Aksekili Ahmed Hamdi, *Dini Dersler*, İstanbul, Amedi Matbaası, 1339 [1923]-1342 [1926], p. 89.

¹²¹ *Ibid.*, p. 40.

¹²² *Ibid.*, p. 162.

¹²³ *Ibid.*

¹²⁴ *Ibid.*

the religion and custom»¹²⁵. This definition contradicted the new discourse produced upon the 'law' in civics education. The relations between individuals and the state are designed within religious patterns. The religious duties extended into doing military service, training, guarding and ensuring solidarity. The 'biggest sin' was taught as escaping from these militaristic duties¹²⁶. This last phase of the book can be regarded as the first reflection of militarism in the religious textbooks.

The emphasis on state duties in the disguise of religion was not a characteristic of the Unionist period. The duty of military service and tax were separately titled. In addition, the issues such as the right of freedom, property and equality principle also were taught in parallel to the state authority. Islam was tailored so as to fit with the 'necessities of the present age'. The modernist view was seemingly inherited from the Unionist period, which first confronted the conflict between science and religion. The conflict was aggravated with by secular nationalist policies in the 1920s.

The Peasants' Book of Religion

The content and language of the Friday sermons delivered to the public constituted one of basic discussions among Muslim intellectuals in journals such as «Sebilürreşad». The discussion was first of all about the language of the sermons, which were given in Arabic to Turkish audiences and served for no political and social use. The use of the vernacular language in preaching seems to have been supported by most of the intellectuals¹²⁷. Another discussion on the sermons was related to their content, which generally included subjects about the Hereafter by trivializing the value of the material world. The discussions in the journals point out the necessity of subjects relevant to the problems of Muslims in political and social terms, such as the reasons for the backwardness of society and the integration to the constitutional regime¹²⁸. One of the most common sermons prepared by the Committee for Union and Progress revolved around a basic message raising awareness about worldly matters. Islam was presented as a sufficient religion for progress and happiness. The union of Muslims economically was exemplified with the opening of factories through cooperation¹²⁹. Some other titles indoctrinated some political concepts within religious terms such as equality, fraternity, justice, liberty, and patriotism.

¹²⁵ *Ibid.*, p. 224.

¹²⁶ *Ibid.*, p. 242.

¹²⁷ R. Doğan, *Cumhuriyet Dönemi Öncesinde Yaygın Din Eğitimi Açısından Hutbeler*, «Ankara Üniversitesi İlahiyat Fakültesi Dergisi», 39/0 (n.d), pp. 491-533, in particular p. 512.

¹²⁸ *Ibid.*, p. 512.

¹²⁹ *Mevaiz-i Diniye, Birinci Kısım*, İstanbul, [Osmanlı ITC Şehzadebaşı Klubü Heyet-İlmiyesi

The Peasants' Book of Religion ('*Köylü İlmihali*') described a book explaining the essentials of Islamic belief. The book written for peasants in 1922 (1338) was authored by Vahit, whom it is not known whether he was affiliated with the CUP or not. Yet, it is important to ascertain to what extent parallel lines can be observed between the textbooks of the modern schooling and a book written for adults in rural areas. Villages were considered areas of uncivilized population necessitating special treatment and approach in terms of education policies in the Unionist period. The enlightenment or modernization of villagers continued to be considered a special issue that culminated in the Republican years as a systematic policy on the villages. The book was a written document of an actual preaching as far as can be understood from the expressions and addresses.

It adapted the *hikmet* (reason) point of view in the textbooks examined above. The peasants' religion book introduced the belief of God grounded in reasonable conclusions. The conflict between the practical result of believing in Islam and theoretical results were pointed out and it was emphasized that Islam had not initiated underdevelopment. Practicing Islam truly was believed to bring progress:

Now if you are not offended, I will explain the reason for our ignorance living as a Muslim. If we had been deservedly Muslim, we wouldn't have been in such a situation. Thank God, we are Muslim but to be honest, we don't know how to live Islam. If you ask why, because Islam wants cleanliness, yet we are dirty [...] it wants diligence, we are lazy. It wants health and power, yet we are rotten (sick)¹³⁰.

We do not like other nations, but I wonder which nation could admire us? If you say science, there is no science, say arts, no arts, say righteousness, no righteousness. No morality, no justice [...] and we are better than all, ha? We are deceiving ourselves, gentlemen¹³¹.

O subjects of God! Isn't this much absent-mindedness enough? Isn't this much poverty enough? Let's, for God's sake, go to work! Let's not stop, never stop!! We are not in an age of stopping and disregarding. The world is turning. Everybody is struggling for his own interest. Never get back. Do not let yourself insulted and your religion blamed¹³².

While encouraging success in the world, on the other hand, he warned that religion should not be discarded for the sake of worldly affairs. He said that Europe and America, which were so much developed in the material world, had not given up their religions. He had two points about developed countries. First, they had not given up worldly affairs though they were so wealthy, second, besides their hold on the world affairs they do not give up following their religions. He asked: «O Muslims, why is your belief growing weaker and weaker each day? Why are you becoming so distanced from the

Tarafından neşredilmiştir], 1328 [1912], p. 14.

¹³⁰ Vahit, *Köylü İlmihali*, İstanbul, Matbaa-i Amire, 1338 [1922], p. 40.

¹³¹ *Ibid.*, p. 61.

¹³² *Ibid.*, p. 117.

mosques and congregation of Muslims while everyone all over the world is hugging his religion without questioning its credibility or incredibility? [...] Let aside Europe and America, don't you see the Christians in this country?»¹³³. He regretfully asked, «Why are you so disinterested to the prayers? What harm of religion did you experience in this world? Is it because you did not understand the benefits of belief?»¹³⁴.

The credibility of religion was enabled through the principal orders of Islam regarding the daily life. The discourse in explaining the ablution with hygiene and fasting with health went in parallel with the textbooks. The preacher likened the microbes to «little worms» (*kurtçuklar*) to make what he said concrete. He told people not to get angry when microbes were mentioned, stating that they, too, were the creatures of God¹³⁵.

The book gives place to fasting under the title of *The Benefits of Fasting in Medical Science*, which gave a utilitarian point of view: «Gentlemen, there are countless benefits and multifold reasons (*hikmet*) in every command of our religion. It is not beyond the power of our wisdom to understand all of them. As the science and technology have developed, the greatness of our religion has been revealed more. I am going to articulate only some of the benefits of fasting to our health and goodness»¹³⁶. He introduced fasting as a protector against illnesses and 'all evils'.

The relation between wealth and religion was another point bridging Islam to this world. The old understanding of religion was rejected first to establish a new insight on Islam. This new Islam was presented as a newly discovered or realized form of God's messages. *Say* (diligence) was encouraged as an addition to the tripod philosophy of *kanaat* (satisfaction), *tevekkul* (fatalism, putting oneself to God's hands) and *sabır* (patience).

[...] there is one more constituent of satisfaction, fatalism and patience. It is diligence. Since it does not suit with our interests, we don't mention it ever. Only we live in the hold of the other three¹³⁷.

He tried to deconstruct the negative perception about becoming rich. The poverty of Muslim geographies was questioned and the social ills that resulted from it were underlined:

Why are we like this? Is it the war or armistice making us so poor? No, no! Neither wars nor others [...] We were poor before the war; we were this much lazy [...] Do not attempt to blame the friends or enemies for this sin¹³⁸.

¹³³ *Ibid.*, p. 61.

¹³⁴ *Ibid.*, p. 62.

¹³⁵ *Ibid.*, p. 108.

¹³⁶ *Ibid.*, p. 70.

¹³⁷ *Ibid.*, p. 110.

¹³⁸ *Ibid.*, p. 123.

The preacher ascribed the guilt to the attitude of Muslims towards life; their being lazy and content with what they had. He encouraged wealth and explained why poverty was objectionable in the sight of religion, too.

[...] some people despise richness. They admire destitution by neglecting such a blessing of God. I don't know why they approve of poverty, why they pose hostility to wealth. Is it good to be needy and lean on other people? Poorness is not a toy, God forbid, it is an ordeal. There is no way to love it. There is such a degree of poorness, God forbid, it bores man so much that it leads to thousands of sins¹³⁹.

Such statements as «O God, make me closer to the poor» (*Allah'im beni fakire fukaraya yakın et*) were to be replaced with «May God make me refrain from being poor» (*Fakirlikten Allaha sığınırım*) under the title of *Wealth*. He exemplified the issue to in order to be strongly convincing: «Imagine how much a ship needs the sea to go! The same way a Muslim does need worldly wealth»¹⁴⁰.

As seen in the tendency of the other authors, he did not fail to caution about excessive love of the world. The love of this world was likened to a state of malady if not defined within the limits of religion: «What harms you if you keep your wealth, capital and commodities in your cash desks or cupboards, but not in your heart»¹⁴¹. Thus a moralistic and religious wealth and richness was suggested and supported. As a result, Vahit's book for adults in villages described a new view of religion in the axis of this world. The text for adults' preaching confirms the textbooks of children examined in this study. It can be concluded that the general understanding of Islam tended to be concerned more with this world than the eternal life.

The Treatment of Nationalism

The nationalist idea of the period was demarcated into two paths as far as drawn by Ahmet Naim, one of the well known Islamists. His article, *İslam'da Dava-i Kavmiyet* ('The Nationalist Cause in Islam') published in 1916 put nationalists into two groups in respect to their treatment of religion¹⁴². The first group was defined as 'pure Turkists'. They regarded religion as acceptable only to the extent it functioned to consolidate the modern national project. In their formula, religion must instrumentally and secondarily be incorporated to the system:

¹³⁹ *Ibid.*, p. 120.

¹⁴⁰ *Ibid.*, p. 122.

¹⁴¹ *Ibid.*

¹⁴² Ahmet Naim, *İslam'da Kavmiyet Davası*, n.p., Darülhilafe, 1332 [1916].

Let's find out a way that provides us happiness of this world. As long as religion served worldly happiness, we follow it [...] However, there is no possibility of progress with the old beliefs. If there was, we wouldn't be in this situation now. [...] This people ought to be Turk first and Muslim secondarily¹⁴³.

Material progress was the first motive behind the unpopularity of Islam in the sight of the secular nationalists. The credibility of Islam was bound to the success of the political theory of Islamism. The second group was defined as Turkish Islamists, whom Ahmet Naim targeted to convince since the first group's exclusion of Islam left no common point on which to agree. He stated that Islam encompassed both the homeland and Turkishness: «Please do not turn the face of Turks from Kabe to Turan. [...] There is no need for us to know the law of Cengiz, the land of Ilhan and the Golden Army»¹⁴⁴.

What is interesting to note is that nationalist thought which was considered «an enlightening trend» (*münevver bir ceryan*) by Musa Kazım, the *Sheikhul-islam*, did not bear a serious challenge to the reproduction of religious knowledge in textbooks¹⁴⁵. It could rightfully be claimed that the widespread 'national ideal' was drawn between us/others binary opposition. What was national was what was not foreign. Hence, the 'national ideal' in the educational context was based, not on but against something during the 1910s. Foreignness was perceived to be someone or something from Europe or America, or the foreigners were the non-Muslims among 'us'. In this sense, 'national education' did not necessarily stand against Islam in the discussions of the 1910s; instead, the national and Islamic characters fostered and strengthened each other. To exemplify from the recommendation of an educator, the foreign teachers and foreign education were no longer welcomed; the project of sending students to Europe was disliked. Only those students who were only sent after the high school education could be trustable and expected to be beneficial to the country. Those who were educated in Europe from childhood were believed to lack the Ottoman national identity. The students sent via state finances had to be selected with regards to their success in the courses on religion, the Ottoman history, geography and Turkish language. Those who did not get good marks from these courses must even be stopped with the police force¹⁴⁶. The students who are sent by the state had to be kept from marrying 'dishonored' women; the consulates must be reminded about not marrying such couples since the harm of such women to the Islamic and Turkish family and society was already evident¹⁴⁷.

¹⁴³ *Ibid.*, pp. 7-8.

¹⁴⁴ *Ibid.*, pp. 15-18.

¹⁴⁵ Appointed as *Sheikhul-islam* four times following the Constitutional regime.

¹⁴⁶ Ahmet Hikmet, *Milli Terbiye*, «Milli Talim ve Terbiye Mecmuası» (Mart 1334 [1918]), p. 53.

¹⁴⁷ *Ibid.*, p. 54.

While the conflict with science made up the basis of the debate on religious education, 'nation' and 'nationalism' seem not to have been taken into consideration in the textbooks on religion. The national character in religious education described in articles, which proposed new perspectives on religious education suggested the need for Turkish prayers. A second peculiarity emphasized the use of religion in instilling the subjects related to the enhancement of the state power through the discourse of 'duties' to the state besides 'God'.

However, what can be seen is that the religion books totally neglect the nationalist theories and do not develop a discourse about the dissolution of *ummah* viewpoint. While it is possible to see the traces of Turkish nationalism in the civics and history books, the textbooks on religion used the word 'nation' rarely, and when it was used *millet* (nation) meant *din* (religion) as seen in Muallim Erşed's book of 1917 (1333): «Religion means nation, that is Islam. The way of goodness and salvation is only through Islam. A Muslim searches and finds every truth with it (Islam)»¹⁴⁸.

The consciousness of the Islamic identity and fraternity marked the basic message in the textbooks: «I love Islam and I can sacrifice my soul if necessary for the sake of it... Although a Muslim who lives in China, India and Africa is not a fellow citizen, I suppose that he is my brother. If I hear or witness a trouble or need of his, I feel that I must come to his rescue»¹⁴⁹. The religious identity and Islamic fraternity were encouraged in the textbooks as follows:

All goodness is in the way of Muslims. A pious person overcomes every single work successfully. Muslims are brothers. They help each other as brothers do¹⁵⁰.

The morality and belief of Muslims are emphasized in this consciousness. Non-Muslim versus Muslim opposition appears to have been the point of identity:

Muslims worship only one God [...] Every Muslim knows Mohammed as the true prophet and follows the truthful and good path pointed by him and finds the goodness of all. Thank God I am Muslim. I like to be Muslim and have Muslim brothers. I was born Muslim; I will live and die Muslim. All my existence is for being Muslim¹⁵¹.

A consciousness of being Muslim was aroused in these lines; the model was given as the Prophet Muhammad. The aim of the religious texts certainly was to build a pious man who was molded within a religious belief system. The

¹⁴⁸ Muallim Erşed, *Muvazzah Malumat-ı Diniye*, İstanbul, n.p., 1333 [1917]) (*Maarif-i Umumiye Nezareti Celilesince tanzim olunan son müfredat programına tevfiқан tertip edilmiş ve nezaret meşarileyh tarafından bilcümle mekatib-i iptidaiyede tedris edilmek üzere kabul buyurulmuştur. Mekatib-i iptidaiyenin birinci sınıf talebesine mahsustur*), p. 3.

¹⁴⁹ Hafız Erşed, *Malumat-ı Diniye, Birinci Kitap* (Devre-i Ula, Birinci Sene), Dersaadet, Kanaat Matbaası, 1338 [1922]), p. 15.

¹⁵⁰ Muallim Erşed, *Muvazzah Malumat-ı Diniye*, cit., p. 4.

¹⁵¹ *Ibid.*

Prophet Mohammed's role in this shaping is noteworthy. His life – *siyer* – and words – *hadith*, as two subjects of Islamic teaching, were both emphasized in the reports and the curriculum: «I do by pleasure what the Prophet Mohammed orders. I restrain from what he counts as harmful [...] I like the Quran and I read it night and day. I do every work of mine according to the Quran. One who loves the Quran is destined for Heaven; one who dislikes it for hell»¹⁵². The reason for the backwardness was shown in the loss of religious ties and not being pious enough¹⁵³.

The Prophet's life story was just used to show solutions for the modern problems of Muslims as shown above. The samples chosen from his life were used pedagogically to transfer the message that the religion was still worth following. The goal was exact revenge on the 'foreigners' through the spirit of Islam:

He went to Şam when he was just twelve and twenty-five for trade and a journey. He had wars with enemies so as to enlighten every land with Islam's truth. We, too, ought to work for trade and travel as much as we work for our religion. We should be strong enough not to give a chance for the enemies of religion and homeland. We should never forget to avenge ourselves on them¹⁵⁴.

Nazım Nuri's textbook *Mekteplilere İlmî Malumat-ı Diniye*, published on the brink of the abolition of the Caliphate in 1923 (1339) is observed to give this Muslim consciousness about the Caliphate, which was presented as the representative of the Prophet.

Thank God every morning and night, since He created us as Muslims. The biggest religion is the religion of Islam in the world. [...] My homeland is a Muslim land. The representative of the Prophet is the caliph. The caliph is responsible for doing the beneficial and good works for Muslims¹⁵⁵.

The nationalist thought, the institutions of the state and the sultanate were not mentioned in the textbooks. The neglect of nationalist idea instead was filled with the unity and fraternity of Muslims. The Islamist union was prolonged and encouraged in the textbooks. The textbooks of religion problematized the challenge of modern science rather than nationalism. Religion was made compatible with the modern world without touching upon the nationalist insights. What is more interesting in the religion textbooks is the disappearance of this Ottomanist identity. The nation is all Muslims, which is the *ummah* of the Prophet. Thus the religion textbooks until 1927 did not become means of conveying the strength of the state or the sultanate.

¹⁵² *Ibid.*, pp. 6 and 17.

¹⁵³ Hafız Erşed, *Malumat-ı Diniye* (Birinci Kitap, Devre-i Ula, Birinci Sene), cit., p. 16.

¹⁵⁴ Muallim Erşed, *Muvazzah Malumat-ı Diniye*, cit., p. 7.

¹⁵⁵ Nazım Nuri, *Mekteplilere İlmî Malumat-ı Diniye*, İstanbul, Necm-i İstikbal Matbaası, 1339 [1923], p. 16.

Although the religion textbooks served for the preparation of a compatible religion with profane understandings, they can also be seen as part of the two domains of knowledge that competed to take place in the minds of students and in the curriculums. The religious creation story defines all the historical revelation from such a point of view. This was a contrast, considering the new domain of knowledge that emerged with Darwinian inspirations. History started with the first man, Adam, in the religion textbooks and the mission was given to that man within a relation to the Creator. The agents and heroes of this narration were taken from the Quran and the sequence of prophets determined the notion of time as the geography in the holy book prepared the notion of place. Muslims were modeled with Islamic characters and the past was built upon such concepts as the Islamic history of the Four Caliphates, and the companions of the Prophet¹⁵⁶.

Conclusion

In the guidelines of the ministry (1915), raising a pious child was determined one of the goals of primary schools. The religious hold on education continued in the ‘moral education’ agenda in the new educational theories. The ideas of the politically constructed Ottomanism after the 1908 Constitution seems to be secured within the new limits of ‘true religion’. The rational religion idealized in this resurrection protects the secular and liberal lines. The doctrine of religion was redrawn so as to preserve its ‘purity’ from the historical forms of bigotry (*hurafat*). In this framework, although it is controversial whether the Islamist education policy of the Unionists was in intrinsic or instrumental value, the fact was that an Islamic identity somehow constituted part of the policy during the Constitutional regime at least for the early years of childhood.

The defense of religion in school knowledge was reverberated in the conviction that Islam was superior and more comprehensive than the knowledge acquired through the induction method of new science. The present progress of Europe was realized owing to the contributions of Islamic civilization and values which were allegedly neglected by Muslims and caused backwardness. The failure is seen in the lost universal values of Islam. Thus, the intrinsic motive that searched for a reconciliation/negotiation with modernity in the essential sources of Islam was an effort to strengthen the faith, which was thought by

¹⁵⁶ One extraordinary sample of a textbook is Hilmi’s much earlier text which encompassed the conception of duties so as to include the country, the sultan, the parents, laws and military. İ. Hilmi, *Müslüman Çocuğun Yeni İlmihali*, İstanbul, Mahmut Bey Matbaası, 1326 [1910] (*Küçük çocuklara akaidi talim eder. Tertibi güzel, yazılışı sadedir*), pp. 24-28. Published in 1910, this book was not approved by the Office in 1919 for the reason that the book was more like a civics textbook rather than religion. See Chapter 2.

the educators losing its credibility, especially among the youth. The revival of religion was by all means the effort to save the fading religion and to make it more believable for the youth. A search for an eclectic educational philosophy, which had arisen from the classical sensitivity that Europe was only to be followed in its technology and science was proceeded. Although the Unionist policy of Islam was doubted, or the role of religion was underestimated, it is clear from the details of the guideline that there was a tendency to make Islam and progressivist idea co-operate in the formation of an Ottoman nationalism.

Religious instruction in the modern schools was problematized for two reasons: one was the 'need' to categorize, classify and qualify the Islamic knowledge with respect to scientific pedagogy; the second, the supposed «moral depression» (*ahlaki bunalım*) among the youth who were noted as having lost their faith under the influence of materialism. The underpinnings of the moral sensitivity in the educational theories of the European pedagogues were outlined with respect to the philosophical and historical evolution of education. Here, the two reasons complemented each other in that the pedagogical methods and approaches applied in the religious knowledge aimed to resurrect Islam so as to combat with the evils of materialism.

In search of this new pedagogical Islamic teaching, the textbooks broke away from the classical texts of Hamidian period, which had explained religious obligations through the rewards and punishment of religious system; textbooks, following the Constitutional reform, developed a modern discourse which reinterpreted and formulated the religious duties so that a scientific verification of religious knowledge was reached. Except for Eğribozi's classical view, the overwhelming tendency of the textbooks in the Second Constitutional Period proposed an Islam approved by what the modern science discovered; however, this relationship was founded upon religion's validity and sufficiency against the modern, not upon an inferior provision.

The scientific discourse used in explaining the prayers which theoretically were performed for gaining the consent of God in the classical discourse of Islamic teaching showed the effort of the 'justification' of religion relying on its worldly part that appealed to human reason. This is, in a sense, a defense of religion against the discrediting of beliefs which was articulated more openly by some intellectuals affiliated with the radical Westernist block in the Second Constitutional period. Although one of the probable results of this scientification of religious knowledge, the accounts of benefit (*faide*) and reason (*hikmet*), could be counted as the secularization of religious content, this seems not to have been the intention of authors exactly since they often admonished students that worshiping was made only for God. This new understanding produced a defensive language against the victory of the Western secular values and knowledge.

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- , *Ameli Malumat-ı Diniye*, İstanbul, Kütüphane-i İslam ve Askeri, 1335 [1919]) (*Zükür ve inas mekatib-i sultaniyenin beşinci ve mekatib-i iptidaiyenin altıncı senelerinde tedris olunmak üzere maarif nezareti tarafından kabul edilmiştir. Devre-i Aliye, İkinci Sene*)
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Nell'officina creativa di Gianni Rodari: dal *Quaderno di Fantastica* al «Pioniere»

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Inside the creativity workshop of Gianni Rodari: from the “Quaderno di Fantastica” to the journal «Pioniere»

ABSTRACT: The paths explored by Italian author Gianni Rodari in analyzing and formalizing his poetry date back to the age of youth, when – in 1935 – he noted his intentions in a scratchpad, subsequently called *Quaderno di fantastica* ('Book of Wonderful'). Those notes, apparently scattered and lacking in logical sense, turned out to be an extraordinary basis for his future work, which would culminate in his famous masterpiece *Grammatica della fantasia* ('Grammar of Fantasy', 1973) as well as in his posthumous *Esercizi di fantasia* ('Exercises for Fantasy') – works that can better be comprehended only in the light of the entire, lifelong development of the writer's creative process. In his production a point of reference is represented by his important journalistic activity as well, of which the present essay analyses the season related to the journal «Pioniere» where Rodari worked in the years 1950-1960.

TEE/EET KEYWORDS: Children's and Youth Literature; Writing; Author; Periodical; Literary Criticism; Italy; XX Century.

In una testimonianza retrospettiva, Gianni Rodari ricorda il suo primo incontro con la creazione di storie per bambini, facendolo risalire al 1938, un anno dopo aver conseguito il Diploma Magistrale da privatista. Allora iniziò a insegnare nella scuola elementare come supplente sottovalutando le proprie competenze didattiche, ma riconoscendo in se stesso la passione per la narrazione e l'invenzione di nuove storie:

A quell'età, come tutti i giovani, mi dedicavo soprattutto a me stesso, ai miei studi, alle mie letture, alle mie fantasticherie. Spero almeno di essere stato un maestro divertente. Difatti raccontavo storie. Mi piaceva trovare dei modi nuovi di inventare storie e quando ne trovavo uno lo sperimentavo in classe. Due bambini scrivevano una parola ciascuno sulle due facce

della lavagna, senza vedersi. Ricordo che una volta le parole furono «occhio» e «rubinetto»: fui costretto a inventare la storia di una fontana che improvvisamente si metteva a buttare occhi e a cercare la spiegazione di questo fatto misterioso. La storia durò molti giorni e doveva essere abbastanza matta, ma, a parte il titolo, non ne ricordo una parola¹.

Sebbene l'insegnamento fosse per il giovane Gianni un'occupazione per sbarcare il lunario e non certo la propria vocazione professionale, invece già orientata verso la scrittura, come sottolineano primi scritti pubblicati su «L'azione giovanile» e su «Luce» durante la militanza nell'Azione Cattolica², appare chiara la sua propensione verso 'l'arte d'inventare' che amava sperimentare con i suoi alunni mettendo alla prova gli studi appassionati e profondi che nel frattempo andava elaborando da autodidatta³. Tra questi, il nucleo originario dal quale hanno avuto origine le sue ricerche attorno all'arte di inventare, è rappresentato dai *Frammenti filosofici* di Novalis dove, come Rodari rende noto nella *Grammatica della fantasia*, lesse la seguente affermazione: «Se avessimo anche una Fantastica, come una Logica, sarebbe scoperta l'arte di inventare»⁴.

Da qui l'impegno rodariano si sarebbe mosso lungo due itinerari principali tra loro fortemente interrelati: da un lato l'approfondimento critico-letterario del surrealismo francese di Breton e di seconda generazione, oltre alla lettura assidua del futurismo italiano di Aldo Palazzeschi, di Alfonso Gatto⁵ e di molte altre fonti che nel tempo avrebbero configurato una base di riferimento sempre più ampia e stimolante; dall'altro lato l'ideazione fantastica, il laboratorio di scrittura dell'autore che si sarebbe sviluppato ed evoluto nella concretezza delle occasioni nelle quali si trovava a vivere. Il Rodari delle letture divorate e alla ricerca di conferire un senso all'elaborazione teorica attorno all' »arte d'inventare«, aveva bisogno di dare un'oggettivazione ai propri ragionamenti che sperimentava nel tempo su più tavoli: nell'insegnamento, nel giornalismo per ragazzi sull' «Unità», sul «Pioniere» nel doppio e fondamentale ruolo di autore e direttore del settimanale (1950-1953), come collaboratore di molteplici

¹ G. Rodari, *Facevo la terza*, in *L'avventura*. Antologia per la scuola media, Firenze, La Nuova Italia (cit. da *Centro Studi Gianni Rodari* <<http://www.rodaricentrostudiorvietto.org>>, ultimo accesso: 21 giugno 2012).

² Sulla produzione di Rodari ancora adolescente e con ruoli di propagandista e di presidente della Sezione giovanile dell'Azione Cattolica di Gavirate si rinvia a L. Caimi, *Gianni Rodari: gli anni della formazione e della prima militanza comunista (1920-1946)*, «Annali di storia dell'educazione e delle istituzioni scolastiche», 1994, e «Schedario», n. 1-2, 1994, pp. 75-99; e al volume L. Caimi, F. Lucchini, *Gianni Rodari a Gavirate: gli anni giovanili*, Gavirate, Nicolini, 1995.

³ Nell'*incipit* della *Grammatica della fantasia*, Rodari ricorda che tra la fine del '37 e il '38 insegnava italiano in una famiglia di ebrei tedeschi e che in quei mesi si accostò alla lingua tedesca e alla letteratura tedesca e russa: «imparai un po' di tedesco e mi buttai sui libri di quella lingua con la passione, il disordine e la voluttà che fruttano a chi studia cento volte più che cento anni di scuola». G. Rodari, *Grammatica della fantasia*, Torino, Einaudi, 1973, p. 3.

⁴ *Ibid.*

⁵ Di queste e altre fonti rodariane entra nel merito il ricco e documentato saggio di P. Boero, *Una storia, tante storie*, Trieste, Einaudi, 2010, pp. 9-10.

riviste tra cui il «Corriere dei Piccoli»⁶ e più tardi incontrando le scolaresche e 'provando' con loro i propri inediti⁷.

Il quaderno di Fantastica

Il fronte dell'approfondimento e quello della creazione letteraria sono legati tra loro grazie a un piano intermedio di elaborazione teorica della propria arte poetica che, se giunge ad essere presentata in modo sistematico solo nell'ultima fase della sua vita⁸, in realtà è stata oggetto di attenzione costante da parte dello scrittore. Anzi, l'elaborazione formale può essere fatta risalire a quello scartafaccio del 1943, chiamato da Rodari *Quaderno di fantastica* nella *Grammatica della fantasia*⁹, e di recente effettivamente trovato da Giorgio Diamanti tra le carte dell'archivio Rodari¹⁰. Si tratta di un quaderno di scuola a righe di terza elementare dove sono presenti ricche annotazioni relative alle letture effettuate che lasciano emergere spunti originali di rielaborazione in vista della costruzione di un saggio sulla «Fantastica». Ben prima dunque di indirizzare la propria scrittura ai bambini, Rodari mette a tema schematicamente il suo programma di lavoro del quale possono essere sottolineati alcuni punti degni di particolare interesse per comprendere le linee di sviluppo successive.

Un primo aspetto, desunto da Breton, riguarda l'immagine mentale ideativa dell'autore che non scaturisce da un paragone ma da un accostamento di due realtà distanti per via analogica e perciò essa appare sotto forma di un condensato di sentimenti, ricordi e fantasie espressi in modo fantastico e dinamico avvertendo da subito l'opportunità di dover pensare a opportune strategie per mettere in movimento parole e immagini. A questo proposito nello scartafaccio sono elencate, ma ancora non connesse da un punto di vista logico e strutturale, alcune 'sollecitazioni' ulteriori sulle quali Rodari avrebbe poi nel tempo largamente lavorato: «la pietra, il duello»¹¹. Si tratta di vere e proprie anticipazioni che l'autore sarebbe giunto a formalizzare in modo compiuto nella *Grammatica della fantasia*: «la pietra» insieme ai «periodi

⁶ Rodari collabora al «Corriere dei Piccoli» dal 1961 all'inizio della direzione riformista inaugurata da Guglielmo Zuconi succeduto al più conservatore Giovanni Mosca. I primi scritti di Rodari appaiono sul n. 13 del 26 marzo 1961 e proseguono fino al n. 10 del 10 marzo 1977.

⁷ G. Rodari, *Esercizi di fantasia*, Roma, Editori Riuniti, 1981, rif. 19832, p. 113.

⁸ Ci si riferisce a *Grammatica della fantasia* del 1973 e all'opera postuma del 1981 *Esercizi di fantasia*, cit.

⁹ Rodari, *Grammatica della fantasia*, cit. p. 4.

¹⁰ Sull'argomento si rinvia al recente saggio di A. Vaghi, C. Zangarini, *Gianni Rodari e la Fantastica*, in C. Zangarini, P. Macchione, A. Vaghi (edd.), *Gianni Rodari e la signorina Bibiana. I racconti e gli scritti giovanili 1936-1947*, Varese, Macchione Ed., 2010, pp. 134-158.

¹¹ Vaghi, Zangarini, *Gianni Rodari e la Fantastica*, cit., p. 141.

rotondi (concentrici)»¹² diventano poi il «sasso gettato nello stagno»¹³, mentre il «duello»¹⁴ sarebbe poi diventato «l'incontro fortuito tra parole» in articoli apparsi sul «Pioniere» per poi giungere ad essere stabilmente riconosciuto come «binomio fantastico»¹⁵ nel saggio del 1973.

Nei propositi iniziali di ricerca compariva poi l'annotazione «la fantasia deduttiva»¹⁶ che largo spazio avrebbe avuto nell'ideazione di filastrocche come quelle del *Libro degli errori*¹⁷, mentre insieme all'intento dichiarato dei «procedimenti magici» avrebbe caratterizzato larga parte della produzione di storie fantastiche come *Favole al telefono*¹⁸.

Ma nello scartafaccio del 1943 Rodari pensa anche alla «cronaca giornalistica»¹⁹ che molto l'avrebbe occupato di lì a poco sia come esordio nella scrittura per ragazzi sia come spazio per continuare a riflettere sul proprio piano di lavoro di elaborazione teorica. Infatti negli anni Sessanta pubblicò le proprie osservazioni su «Paese Sera»²⁰ e successivamente sul «Giornale dei genitori» con tre articoli tra il 1969 e il 1971²¹ poi rifluiti nella *Grammatica della fantasia*²².

Nell'officina del «Pioniere»

Indubbiamente il cammino di crescita nell'elaborazione poetica rodariana attorno alla scrittura per ragazzi, è il frutto del lavoro dello scrittore su vari tavoli della propria officina creativa. In particolare l'attività giornalistica è l'ambito per antonomasia più fecondo di stimoli per rintracciare alcuni snodi fondamentali della crescita letteraria dell'autore scanditi nel tempo, per cogliere la nascita di idee e di riprese, di condensazione di stimoli precedenti in nuove situazioni narrative, di contaminazioni che nascono e si sviluppano all'interno della vita del periodico e si irradiano oltre questo rifluendo nelle raccolte in volume e nelle innumerevoli revisioni stilistiche offerte nel tempo da Rodari stesso e oltre la sua intenzionalità²³.

¹² *Ibid.*

¹³ Rodari, *Grammatica della fantasia*, cit. p. 7.

¹⁴ Vaghi, Zangarini, *Gianni Rodari e la Fantastica*, cit., p. 141.

¹⁵ Rodari, *Grammatica della fantasia*, cit. p. 17.

¹⁶ Vaghi, Zangarini, *Gianni Rodari e la Fantastica*, cit., p. 141.

¹⁷ G. Rodari, *Il libro degli errori*, Torino, Einaudi, 1964.

¹⁸ Id., *Favole al telefono*, Torino, Einaudi, 1962.

¹⁹ Vaghi, Zangarini, *Gianni Rodari e la Fantastica*, cit., p. 141.

²⁰ G. Rodari, *Manuale per inventare storie*, «Paese Sera», 9 e 19 febbraio 1962. Informazione tratta da Vaghi, Zangarini, *Gianni Rodari e la Fantastica*, cit., p. 156.

²¹ G. Rodari, *Che cosa succede se il nonno diventa un gatto*, «Giornale dei genitori», dicembre 1969; *Un piatto di storie*, *ibid.*, gennaio-febbraio 1971; *Storie per ridere*, *ibid.*, aprile 1971.

²² Cfr. Rodari, *La grammatica della fantasia*, cit., p. 4.

²³ Per una disamina completa della bibliografia rodariana si rinvia al saggio di P. Boero, *Una*

La scrittura rodariana cresce nel giornalismo dell'«Unità» nel secondo dopoguerra. Qui Rodari diventa ben presto inviato speciale e corsivista²⁴ e dal 1949 inizia ad occuparsi della rubrica «La domenica dei Piccoli», firmandosi Lino Picco e avviando così le prime forme di scrittura espressamente rivolte all'infanzia²⁵. Quasi contemporaneamente inaugura sulla rivista «Vie nuove» la rubrica «Piccolo mondo nuovo»²⁶. In molti casi si trattava di filastrocche d'occasione che nascevano da richieste specifiche fatte dai lettori che scrivevano al curatore della rubrica parlando dei loro bambini²⁷. Questa produzione iniziale pone in evidenza immediatamente la preferenza di Rodari per la struttura breve dei testi sia per la loro natura giornalistica, sia perché espressione di rottura rispetto agli schemi tradizionali di ridondanza, affermando invece l'essenzialità della parola in libertà evocatrice di significati altri (di rottura rispetto alla tradizione, di denuncia sociale e civile, di riscoperta di modi di vivere grazie alla dimensione fantastica). Questo iniziale ventaglio di testi poetici uscito sulla stampa andò a configurare la prima raccolta in volume *Il libro delle filastrocche* che sarebbe uscito nel 1950²⁸ a conferma di una scrittura che dall'elaborazione breve nella pubblicistica si irradia oltre la durata del giornale per ottenere una maggiore visibilità e stabilità temporale nell'edizione in volume.

Nella sperimentazione sul campo di nuove tecniche e strategie di scrittura, un passaggio decisivo per Rodari è rappresentato dalla nascita nel 1950 del settimanale per ragazzi «Il Pioniere»²⁹ legato al Partito Comunista italiano e destinato alla formazione culturale dei figli del proletariato militante nel partito. Nei difficili anni della ricostruzione postbellica questo periodico si inserisce in un tessuto pubblicistico per ragazzi dominato dal longevo «Corriere dei Piccoli»³⁰ di ispirazione laica e liberale e dallo sviluppo del «Vittorioso» di ispirazione cattolica e legato all'Azione Cattolica³¹.

storia, tante storie, Trieste, Einaudi, 2010.

²⁴ Dopo alcune collaborazioni tra il 1946 e il 1947 su «il Corriere Prealpino», poi denominato «La Prealpina», nel luglio del 1947 inizia la collaborazione di Rodari all'«Unità» prima come cronista e subito dopo come inviato speciale e corsivista. Cfr. Boero, *Una storia, tante storie*, cit., p. 250.

²⁵ Sull'«Unità» Rodari tiene la rubrica «la Domenica dei Piccoli» dal 13 marzo 1949 al 5 febbraio 1950. Cfr. *ibid.*, p. 251.

²⁶ Rodari inaugura la rubrica «Piccolo mondo nuovo» nel n. 1 del 1949 e la curerà fino al 1951. Cfr. *ibid.*, pp. 14 e 41.

²⁷ Si pensi alla filastrocca *Susanna*, che risulta la prima scrittura poetica per l'infanzia, nata per richiesta di una mamma lettrice per la sua bambina. Cfr. *ibid.*, p. 11.

²⁸ G. Rodari, *Il libro delle filastrocche*, Roma, Ed. del Pioniere, 1950.

²⁹ Il «Pioniere» nasce il 3 settembre 1950 e termina il 20 maggio 1962. Dal 1962 e fino al dicembre 1966 diventa supplemento settimanale dell'«Unità». Successivamente diventa inserto di «Noi Donne».

³⁰ Sul tema si rinvia a R. Lollo (ed.), «*Il Corriere dei Piccoli*» in *un secolo di riviste per ragazzi*, Milano, Vita e Pensiero, 2009.

³¹ Per un inquadramento si veda G. Vecchio, *L'Italia del «Vittorioso»*, Roma, Ave Ed., 2011.

Rodari, oltre a collaborare al periodico fino alla metà degli anni '60 quando diviene supplemento dell' «Unità» per poi cessare la propria pubblicazione, dirige «Il Pioniere» dall'esordio nel settembre 1950 fino al termine del 1953, quando sarebbe subentrata Dina Rinaldi, che già dall'inizio l'aveva affiancato come condirettrice .

È dunque artefice principale dell'ideazione del periodico, di strutturazione del suo piano editoriale e del progetto educativo espressamente volto ad educare i giovani lettori «all'amore per la Patria, il progresso e il lavoro per la pace fra i popoli, alla lealtà e alla sincerità»³². Così, se nell'articolazione interna si coglie una forte propensione per l'informazione giornalistica, per la divulgazione del sapere e della costruzione pratica di oggetti quali basi di possibile emancipazione di classe sociale, non mancano «romanzi d'avventura antichi e moderni», «filastrocche e canzoni» e rubriche per instaurare un filo diretto con i lettori³³. In questa struttura del periodico che guarda al modello maggiore del «Corriere dei Piccoli»³⁴ ma che si differenzia da esso per la propensione alla concretezza, per la crescita di lettori aggregati in gruppi territoriali di «pionieri»³⁵, credendo più nella fidelizzazione di rete di ascendenza «giornalinesca»³⁶ rispetto al rapporto tra il singolo e la rivista, Rodari svolge un ruolo di primaria importanza nelle scelte di contenuti, nell'assicurare quell'equilibrio vivo tra le parti del giornale e non da ultimo gode di uno spazio importante di modellizzazione della propria scrittura.

Attraverso quali vie Rodari vive «Il Pioniere» come officina creativa di elaborazione e di formalizzazione teorica?

L'insalata di favole

Il genere fiabesco costituisce uno tra i primi canali espressivi adoperati da Rodari con un'apprezzabile continuità. Le generose letture del romanticismo tedesco, russo e più in generale di autori inglesi e del nord Europa esercitano

³² Cipollino, *Cipollino e i suoi amici. Il compleanno del Pioniere*, «Pioniere», II, n. 36, 16 settembre 1951, p. 12.

³³ *Ibid.*

³⁴ Si veda la scelta delle vignette con didascalia esterna in copertina, lo spazio della posta, qui tenuta da Rodari stesso con il nome di «La posta di Candido» (1950-1952) e poi «L'Ufficio Postale» (dal 1953 in avanti).

³⁵ «Pioniere» è la voce ufficiale dell'API («Associazione Pionieri d'Italia»).

³⁶ Su altre basi ideologiche all'inizio del Novecento «Il Giornalino della Domenica» di Vamba aveva creato la celebre «Confederazione del Girotondo» che aveva lo scopo di creare una rete coesa tra i lettori oltre le pagine del giornalino con finalità di rinnovamento della vita civile nazionale. Cfr. A. Ascenzi, M. Di Felice, R. Tumino (edd.), *Santa Giovinezza!. Lettere di Luigi Bertelli e de suoi corrispondenti (1883-1920)*, Macerata, Alfabetica Edizioni, 2008.

un fascino sul giovane Rodari³⁷. Nell'ambito della scrittura per ragazzi è assai sensibile alle novelle dei Fratelli Grimm e al ruolo etico –civile da esse svolto nella costruzione dell'identità nazionale tedesca e nel contempo è ammirato dalla capacità di Andersen nel trasfigurare ogni oggetto della realtà in chiave magica e animistica. Su queste basi non stupisce il trovare nel «Pioniere» frequenti adattamenti delle fiabe nordiche e della tradizione russa³⁸, insieme al recupero di una vasta tradizione favolistica che Rodari rivisita nell'apposito spazio «Le favole di Esopino»³⁹. Il territorio della fiaba dunque, ben prima di più maturi interessi, tra cui non va dimenticata la curatela e la traduzione dell'*Enciclopedia della favola* nel 1963⁴⁰, è esplorato dalla scrittura rodariana perché è ritenuto in grado di restituire al lettore in formazione nell'Italia della ricostruzione, un rafforzamento delle radici culturali volte alla formazione del tessuto linguistico unitario del paese⁴¹. Nello stesso tempo la fiaba è ideale per smontare e ricostruire nuovi testi dagli scenari ironici e surreali sia per la ripresa e il rovesciamento paradossale dei contenuti sia per l'uso della rima. In questa

³⁷ Si ricorda che la passione per le culture straniere porta Rodari ad iscriversi alla Facoltà di Lingue dell'Università Cattolica di Milano nel 1939 anche se poi avrebbe ben presto abbandonato gli studi universitari ma non la sete di conoscenza che avrebbe placato studiando autonomamente. Cfr. L. Caimi, F. Lucchini, *Gianni Rodari a Gavirate: gli anni giovanili*, Varese, Nicolini, 1995. Per una ricostruzione biografica di base di Rodari si veda M. Argilli, *Gianni Rodari. Una biografia*, Torino, Einaudi, 1990.

³⁸ Oltre ad essere pubblicate fiabe poco note dei Grimm come *La pappa dolce* («Pioniere», n. 17, 26 aprile 1953, p. 7), o una più anonima fiaba scozzese come *Re coniglio I* («Pioniere», n. 32, 9 agosto 1953, p. 11), compare una traduzione di *Alice nel paese delle meraviglie* riconoscendo in ciò l'importante influenza di Carroll su Rodari nel successivo *Alice cascherina* e in genere per il *non sense* e per i giochi linguistici. Della tradizione russa compaiono testi di Puskin, di Afanasjev e di Tolstoj.

³⁹ Nello spazio «Le favole di Esopino» si trovano la favolistica di Esopo filtrata nel linguaggio spesso poetico rodariano e in genere riduzioni della tradizione fiabesca popolare. Testi fiabeschi sono presenti anche nella serie di storie denominate «Gli animali parlanti» e nella rubrica «Le favole di Flora».

⁴⁰ G. Rodari (ed.), *Enciclopedia della favola*, fiabe di tutto il mondo, raccolte da Vladislav Stanovsky e Jan Vladislav, ill. M.E. Agostinelli, Roma, Editori Riuniti, 1963. Di quest'operazione culturale sembra di poter rintracciare un cenno nel carteggio con Einaudi dove nel dicembre del 1962 Rodari dice che sta traducendo «favole mitologiche greche» anche per esercitarsi nella scrittura in prosa che «non riesce a mettere la presa diretta se non raramente e con visibile fatica. La prosa, che impresa!». Cfr. G. Rodari, *Lettere a Don Julio Einaudi, Hidalgo editorial*, a cura di S. Bartezzaghi, Torino, Einaudi, 2008, p. 29. Non pare di poter affermare che Rodari abbia tradotto direttamente dal cecoslovacco della cui conoscenza linguistica non vi è traccia nella biografia dello scrittore di Omegna, mentre è plausibile credere che abbia tradotto in italiano a partire dall'edizione pubblicata in tedesco con il titolo *Der zweite Marchenbaum, Marchenaus aller welt, Atria, Praga, 1961*, con traduzione di E. Bertleff, edizione a propria volta proveniente da quella cecoslovacca del 1959 dal titolo *Druhý strom pohádek z celého sv ta*, curata da Vladislav Stanovsky e Jan Vladislav.

⁴¹ Si ricorda che negli anni Cinquanta lo stesso Italo Calvino stava lavorando alla raccolta delle *Fiabe Italiane* che sarebbero uscite nel 1956.

direzione sul «Pioniere» si collocano nel 1951 alcune «fiabe in versi» dai titoli evocativi: *Il grillo a teatro*, *I capelli del gigante*, *Le carte parlanti*⁴².

Nel *Grillo a teatro*, è presente in particolare il recupero della tradizione popolare fiabesca per i riferimenti ai *Musicanti di Brema* dei Grimm e al *Pifferaio magico* di Hoffman, ma è altresì visibile l'influenza della favolistica esopica del *Topo di campagna e il topo di città*. Il grillo, come la cicala, canta e incanta anche nella situazione per lui surreale di un teatro di città al posto della vita in campagna, evocando, con tale rovesciamento della situazione, un clima di inaspettata freschezza e allegria capace di convertire anche la borghesia più formalmente educata ma sostanzialmente sgarbata.

Nei *Capelli del gigante* è visibile il riferimento alla fiaba *Il gigante e il sarto* dei Grimm per lo squilibrio tra forza fisica e astuzia e per la presa di coscienza di come la forza fisica possa diventare forza interiore per ripristinare il senso di giustizia. Vale la pena di segnalare che questo tema, variamente ripreso nella produzione successiva, conduce in particolare a una revisione dell'omonima fiaba pubblicata nelle *Favole al telefono* nel 1962. Rispetto alla prima scrittura si assiste al passaggio alla narrazione in prosa e soprattutto all'esplicitazione tra la forza fisica e l'intelligenza poiché si dice che «la forza l'aveva nelle mani e nelle braccia, ma l'intelligenza ce l'aveva nei capelli»⁴³. L'attribuzione al gigante di tale consapevolezza interiore consente all'autore di costruire un intreccio narrativo che volge rapidamente verso la soluzione conclusiva e conferisce alla scrittura maggiore dinamismo ed equilibrio formale.

Nelle *carte parlanti* non manca un riferimento prossimo a Giuseppe Fanciulli con l'opera *Il castello delle carte*⁴⁴ accanto alla più radicata influenza di Andersen per l'improvvisa animazione di giocattoli e oggetti. In Rodari le carte da gioco si animano e diventano re e regine più con vizi che con virtù⁴⁵ e per questo, dopo alterne vicende, sono destinati a ritornare inanimati⁴⁶ ristabilendo il senso di giustizia spezzato. La ripresa della tradizione popolare è inoltre visibile con la presenza della cornice narrativa di una nonna che introduce la fiaba in rima e ne assume la conclusione recuperando le carte da gioco. La nonnina non è altro che la rivisitazione del più antico cantastorie, depositario della conoscenza di

⁴² *Le fiabe in versi* escono sul «Pioniere» nel 1951 secondo la seguente successione: *Il grillo a teatro* dal n. 16 del 21 aprile, p. 6 al n. 19, del 15 maggio, p. 6; *I capelli del gigante* dal n. 20 del 19 maggio, p. 6 al n. 21 del 26 maggio, p. 6; *Le carte parlanti*, dal n. 22, del 2 giugno, p. 6 al n. 29 del 22 luglio, p. 6.

⁴³ G. Rodari, *I capelli del gigante*, in *Favole al telefono*, Torino, Einaudi, 1962, p. 48.

⁴⁴ G. Fanciulli, *Il castello delle carte*, illustrazioni di Sto, Torino, SEI, 1930.

⁴⁵ I protagonisti sono infatti «il re di denari il più avaro di tutti gli avari» e la «regina di picche la più ricca di tutte le ricche». Cfr. G. Rodari, *Le carte parlanti*, «Il Pioniere», n. 22 del 2 giugno 1951, p. 6.

⁴⁶ La quarta puntata de *Le carte parlanti* si conclude con un tentativo di finale aperto che tuttavia ritrova la soluzione della vicenda nella ripresa della cornice narrativa: «Il Re di denari scomparve davvero, chi risolve questo mistero? Lo ritrova la nipotina nella manica della nonnina».

mondi fantastici ai quali avvicinare attenti ascoltatori pronti a misurarsi tra realtà e sogno⁴⁷.

Ma lo sguardo di Rodari alla fiaba classica e la sua reinvenzione in chiave moderna deve molto alla scrittura funambolica di Sergio Tofano, sia per quanto riguarda la rottura e la reinterpretazione degli schemi tradizionali del testo, sia per lo stile. Per quanto riguarda il contenuto si pensi al *Romanzo delle mie delusioni*⁴⁸ dove si assiste ad un viaggio magico nelle fiabe intrapreso da Benvenuto, e dal quale il protagonista esce, non tanto credendo nella fiaba in quanto evasione, ma aderendo «alla logica delle fiabe» in quanto «disponibilità ad apprezzare alcune situazioni fantastiche ma anche il loro contrario»⁴⁹. Similmente a Tofano, Rodari procede tramite l'accostamento analogico di situazioni fiabesche diverse ottenendo per via umoristica sintesi di originalità paradossale.

Accanto a ciò, lo stile costituisce una base di riflessione non secondaria. Nelle fiabe in versi Rodari usa anche versi settenari ed endecasillabi, sperimentando il ritmo vivace e cadenzato della parola, mettendo in campo un'abile costruzione della rima e una evocatività lessicale non distanti da alcune scelte stilistiche di Tofano nelle *Storie di cantastorie* e nelle celebri quartine del *Signor Bonaventura*⁵⁰.

Ma queste tracce di familiarità dello stile di Tofano nelle citate fiabe in versi di Rodari apparse sul «Pioniere», trovano una ben più radicata conferma nella seguente testimonianza rilasciata da Rodari nel 1979, in occasione della mostra *Una storia lunga un milione* allestita a Genova per ricordare l'itinerario artistico di Tofano:

Una volta alla settimana, nella nostra casa ben poco confortevole, arrivava Bonaventura e ci portava, in premio per la nostra attesa, un milione grande come un lenzuolo. Sapevamo perfettamente in anticipo che all'ultima vignetta le persecuzioni del torvo Barbariccia sarebbero cessate, le goffaggini dell'elegantissimo Cecè si sarebbero ricomposte e Bonaventura, grazie al caso che faceva di lui in continuazione un involontario salvatore di pericolanti, il nemico numero uno dei nemici pubblici, l'agente universale del bene, avrebbe intascato il rituale bigliettone. Che cosa, allora, ci faceva leggere ogni volta la sua storia come nuova? Come accadeva che il milione destasse sempre la sorpresa del primo? C'erano, intanto, quei versetti accurati, limpidi, seminati con discrezione di qualche paroletta rara,

⁴⁷ La cornice narrativa consente all'autore di costruire il testo su due livelli i quali, se inizialmente appaiono distinti, alla fine sconfinano l'uno nell'altro. Infatti la fiaba si conclude: «Il Re di Denari scomparve davvero, chi mi risolve questo mistero? Lo ritrova la nipotina nella manica della nonnina». Cfr. Id., «Il Pioniere», n. 29, 22 luglio 1951, p. 6.

⁴⁸ Sergio Tofano aveva pubblicato *Il romanzo delle mie delusioni* a puntate sul «Corriere dei Piccoli» nel 1917, mentre il volume sarebbe uscito da Mondadori nel 1925.

⁴⁹ A. Faeti, *Nota* a S. Tofano, *Il romanzo delle mie delusioni*, Torino, Einaudi, 1977, p. 5 ripreso da P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, Laterza, 2009², p. 159.

⁵⁰ Molte avventure delle *Storie dei cantastorie*, Milano, Vitagliano, 1920 sono scritte in settenari e ottonari. Tofano aveva già ben sperimentato dal 1917 la forma metrica dell'ottonario con la nascita del celebre Signor Bonaventura.

di qualche rima acrobatica, insomma, di suoni inattesi: l'effetto della loro musica era quello di un' infinita serie di variazioni sullo stesso tema. Un effetto di magia. C'erano poi nelle avventure e nelle sciagure (per fortuna rare) del signor Bonaventura sottili, indirette allusioni al mondo, ai suoi personaggi, ai casi della vita che, come diceva Geppetto, «sono tanti». E c'era nel finale ottimistico una promessa generosa di gratificazione, l'assicurazione che ogni speranza, prima o poi, si realizza, che ogni sogno scende in terra.

La gente si sottovaluta. Negli anni in cui gli adulti cantavano sospirando: «Se potessi avere mille lire al mese», Bonaventura, senza alzare la voce, indicava ai bambini una meta mille volte più alta. Guadagnò il suo primo miliardo ben prima degli 'industrialotti' del lavoro a domicilio. Non ignaro di guai e traversie, spesso disoccupato, col tempo anche sinistrato e senz'atletico, Bonaventura ha continuato per mezzo secolo a insegnare che c'è sempre una via d'uscita; che Barbariccia è una tigre di carta; che catastrofi, incendi, fughe di belve dai circhi, briganti da strada, incidenti automobilistici, cavalli imbizzarriti non hanno mai niente di definitivo: più in là c'è sempre il milione, come sopra le nuvole, anche nei giorni di nubifragio, c'è sempre il sole.

Da bambini abbiamo amato Bonaventura per il suo intrepido candore. Da grandi abbiamo ammirato Sergio Tofano per la sua discrezione, la sua misura, la sua invisibile, sterminata, ironica pazienza⁵¹.

Le parole di Rodari confermano in modo inequivocabile il proprio apprezzamento sin dall'infanzia per l'arte inventiva di Tofano e per il personaggio più noto: il Signor Bonaventura, seguito nelle sue avventure futuriste sul «Corriere dei Piccoli». Vi è dunque in Rodari una consonanza verso la musicalità della scrittura di Tofano respirata da bambino, prima ancora di poter essere oggetto di più razionale condivisione adulta, che alimenta naturalmente le sue prime forme di scrittura anche oltre le citate fiabe del «Pioniere». Non stupisce quindi che insieme al sognatore Bonaventura, il piccolo Rodari avesse potuto leggere sullo stesso settimanale le commedie teatrali di Sto, come *La Regina in berlina*, uscite alla fine degli anni Venti⁵², le quali in effetti aggiungono una originale galleria di contaminazioni e di trovate umoristiche paradossali tanto care a tutto il percorso rodariano. In fondo nel primo romanzo *Il romanzo di Cipollino*⁵³, in apparenza molto distante dallo stile di Tofano, troviamo però l'antropomorfizzazione di ortaggi comune a tanta ironia delle commedie nominate e dei *Cavoli a merenda*⁵⁴. Ma anche l'utilizzo di titoli di capitoli in rima, molto fanno pensare alla voce fuori scena che introduce all'azione della commedia.

⁵¹ G. Rodari, *La promessa di Bonaventura*, in *Una storia lunga un milione*, Roma, Bulzoni, 1980, pp. 7-8.

⁵² Sto, *La Regina in berlina*, «Corriere dei Piccoli», 1927, n. 41-46 dal 7 ottobre all'11 novembre, pp. 4-5. Dalla commedia pubblicata sul periodico per ragazzi, l'anno successivo sarebbe stata messa in scena l'omonima commedia teatrale. Cfr. S. Tofano, *Il teatro di Bonaventura*, Milano, Adelphi, 1986, pp. 491. A questa commedia si aggiungono altri racconti umoristici degli anni seguenti come *La principessa dalle lenticchie*, Roma, Reda, 1945 e Milano, Adelphi, 2002.

⁵³ G. Rodari, *Il romanzo di Cipollino*, Roma, Ed. Cultura Sociale, 1951.

⁵⁴ Sto, *Cavoli a merenda*, Milano, Vitagliano, 1920.

La scrittura per contaminazione

L'officina creativa rodariana sul «Pioniere» segue un secondo itinerario di sviluppo attraverso contaminazioni che nascono all'interno delle multiformi suggestioni e opportunità date dalla vivacità culturale presente nella rivista. È nella natura della pubblicistica offrire una miniera di informazioni in continuo mutamento che tendono a rimanere molto più impresse in chi, come Rodari, nei primi anni Cinquanta aveva nelle mani la direzione del settimanale progettandone l'impianto e le scelte dei contenuti. In questo senso la composizione e la varietà dei fascicoli costituiscono per lo scrittore di Omegna una straordinaria «materia prima» di personaggi, di nomi e di idee per creare nuovi testi dando vita sulla rivista a quella modalità inventiva che l'autore dichiarava di seguire normalmente:

Spesso, prima di arrivare a una filastrocca, riempio un quaderno intero di cose che io chiamo «esercizi», scrivendo a ruota libera, lasciando che le parole si associno come vogliono, che le immagini giochino a loro piacere. Ci si accavallano spunti per racconti, commedie e romanzi che non scriverò mai. Io chiamo quelle cose, anche, «materia prima». Scavo la materia prima e le metto da parte. Certe volte non ne viene fuori nulla. Altre volte una riga o una pagina diventano il principio di una favola, o di una filastrocca. Solo una minima parte della «materia prima» diventa... prodotto finito. I miei prodotti finiti – siano filastrocche o favole – amo considerarli come giocattoli. Un buon giocattolo ha un posto importante nella vita del bambino e della famiglia: mette in moto energie, fa lavorare, fa discutere, qualche volta fa anche pensare⁵⁵.

Uno di questi casi è la genesi della scrittura *La filastrocca di Pinocchio* che costituisce un esemplare mirabile di contaminazioni interne alla rivista ed esterne ad essa.

Il testo esce sul «Pioniere» dal settembre 1954⁵⁶. Ma si ritiene che una componente non irrilevante per l'ideazione della filastrocca derivi dal dibattito presente sul periodico a partire dal gennaio del 1954⁵⁷ quando si rivolge un appello ai lettori per salvare Pinocchio. Del celebre personaggio e icona dell'infanzia era in via di definizione la scultura di Emilio Greco che sarebbe stata il simbolo del Parco dedicato al burattino in progettazione a Collodi. Il bozzetto presentato appariva però molto distante dall'immaginario collettivo e ciò aveva sollevato parecchie proteste tra le quali quella del «Pioniere» che dichiara di unirsi al medesimo appello lanciato sul «Corriere dei Piccoli» dal direttore Giovanni Mosca.

⁵⁵ Rodari, *Facevo la terza*, in *L'avventura*, cit.

⁵⁶ G. Rodari, *La filastrocca di Pinocchio*, «Pioniere», dal 1954, n. 37, 19 settembre, p. 1 al 1955, n. 16, 17 aprile.

⁵⁷ D. Rinaldi, *Salviamo Pinocchio*, l'Ufficio postale, «Il Pioniere», n. 4, 24 gennaio 1954, p. 2.

Dopo otto mesi viene annunciata la pubblicazione a puntate *Qui comincia, aprite l'occhio, l'avventura di Pinocchio*⁵⁸. Si trattava di vignette in sequenza con didascalia esterna scritte da Rodari e illustrate da Raul Verdini. In questo testo appare evidente e matura l'influenza di Tofano del Signor Bonaventura per l'idea del fumetto, per l'uso dell'ottonario, per la ripresa degli stessi versi all'inizio di ogni nuova puntata e per la scelta di occuparsi del celebre burattino che nella sua rigidità fisica pare un po' essere progenitore del novecentesco Bonaventura. Non può nemmeno essere trascurata la collocazione in copertina del fumetto ricalcando la tradizione del «Corriere dei Piccoli» che con ogni evidenza, sia indiretta sia diretta, ha costituito un modello editoriale di ispirazione anche per «Il Pioniere». Tofano rappresenta dunque sia un modello in sé sia una fonte di mediazione per recuperare il modello collodiano al quale Rodari si sarebbe riferito, specie nei racconti, perché lo reputava «imbattibile nei dialoghi»⁵⁹ e capace di assicurare una «fusione perfetta di realtà e fantasia»⁶⁰.

Un altro singolare esempio di scrittura per contaminazione riguarda la genesi della nota filastrocca *Che cosa ci vuole*. Pubblicata inizialmente sul «Giornale dei Genitori» nel 1971⁶¹, entra a far parte della raccolta *Filastrocche in cielo e in terra* nella seconda edizione del 1972⁶², poi diventa popolare grazie all'arrangiamento musicale realizzato da Sergio Endrigo partecipando fuori concorso a *Lo Zecchino d'oro* del 1974. In realtà la genesi di questa filastrocca di fine fantasia deduttiva risale proprio ai primi anni di vita del «Pioniere». Nel 1953 sul settimanale esce la poesia *Da dove è venuto il tavolo?* del poeta russo Samuil Marshak⁶³. Con ogni probabilità nel corso del primo viaggio in Unione Sovietica realizzato da Rodari un anno prima⁶⁴, vi era stato un contatto diretto con Marshak che infatti, non casualmente, nel 1953 traduce in russo *Il libro delle filastrocche* e quindi la pubblicazione della sua poesia può essere letta come scambio culturale nell'ambito di interessi comuni. Rodari cura la traduzione della poesia insieme a Vinca Berti. Del testo colpiscono in particolare le successive trasformazioni subite dal pino ad opera del lavoro umano al fine di trasformarlo in un tavolo, mentre la poesia di quasi vent'anni dopo si muove su un terreno di estrema essenzialità formale e leggerezza complessiva, attribuendo

⁵⁸ L'annuncio della pubblicazione viene fatto da D. Rinaldi, *Qui comincia, aprite l'occhio, l'avventura di Pinocchio!* Ufficio Postale, «Pioniere», n. 36, 12 settembre 1954, p. 2.

⁵⁹ Rodari, *La grammatica della fantasia*, cit., p. 52.

⁶⁰ Id., *Lettere a Don Julio Einaudi, Hidalgo editorial*, a cura di S. Bartezzaghi, Torino, Einaudi, 2008, p. 3. La citazione è tratta da un'interessante lettera indirizzata a Italo Calvino nel 1952 nella quale Rodari gli chiede consiglio sull'idea di pubblicare un saggio critico su Pinocchio volto a studiare la genesi del capolavoro collodiano.

⁶¹ G. Rodari, *Che cosa ci vuole*, «Giornale dei genitori», n. 12, 1971.

⁶² R. Rodari, *Filastrocche in cielo e in terra*, Torino, Einaudi, 1972.

⁶³ S. Marshak, *Da dove è venuto il tavolo?*, trad. di Vinca Berti e Gianni Rodari, «Pioniere», n. 12, 22 marzo 1953, p. 9.

⁶⁴ Sulla sequenza dei vari viaggi in Unione Sovietica si rinvia a Boero, *Una storia, tante storie*, cit., pp. 249 ss.

alla natura, e non più all'uomo, l'origine delle trasformazioni. Ma in questo lento processo di ideazione creativa si può registrare almeno un altro passaggio significativo. Alla fine del 1953 nella pagina dell'«Ufficio Postale» Rodari insegna ai lettori a inventare una storia e offre come esempio creativo *Una storia sulle gambe del tavolo*⁶⁵ nel tentativo di convincere un lettore che «i tavolini non crescono sugli alberi come i fichi, ma è il falegname che li fabbrica»⁶⁶. Nel testo dunque ritorna la sottolineatura alla concretezza del costruire e ai cambiamenti così familiari che fanno pensare all'influenza delle novelle di Andersen tra le quali spicca per vicinanza di contenuti *L'abete*.

Gli esempi riportati offrono uno spaccato della scrittura rodariana che va modellandosi nel tempo e in questo processo «Il Pioniere» offre una notevole «materia prima» sulla quale lo scrittore esercita un accurato lavoro di limatura per raggiungere espressioni letterarie davvero compiute e sperimenta personalmente quanto afferma nel racconto del 1954 *Farò il pittore*: «senza fatica non si superano le difficoltà e non si conquista la bellezza»⁶⁷.

Il binomio fantastico

Nello scartafaccio del 1943 tra le strategie per mettere in movimento parole e immagini Rodari aveva appuntato «il duello» di parole⁶⁸ che nella *Grammatica della fantasia* avrebbe ribattezzato «binomio fantastico»⁶⁹. Con tale espressione intendeva mettere in risalto l'effetto di straniamento imprevisto generato dall'accostamento di due termini semanticamente distanti tra loro e le potenzialità di fantasticazione che da tale associazione possono derivare nel costruire una narrazione. Lungo questo itinerario lo scrittore di Omegna avrebbe nel tempo composto numerose storie rimaste celebri, contenute nella raccolta *Favole al telefono* fino ad arrivare a racconti di maggiore ampiezza, come ad esempio *La torta in cielo*⁷⁰, dove la contrapposizione tra leggerezza e materia, si ricompone nello straniamento di un dolce da sogno che diviene realtà agli occhi dei bambini. Ma in questo percorso compreso tra i propositi iniziali di approfondimento e l'esposizione sistematica della poetica nella *Grammatica della fantasia*, l'officina creativa rodariana sperimenta nuovi intrecci e riflette al tempo stesso attorno ai meccanismi di scrittura mostrando un'attenzione al

⁶⁵ G. Rodari, *Volete una storia sulle gambe del tavolo? Eccola qua*, «Pioniere», n. 47, 29 novembre 1953, p. 2.

⁶⁶ *Ibid.*

⁶⁷ G. Rodari, *Farò il pittore*, «Pioniere», n. 19, 9 maggio 1954, p. 4.

⁶⁸ Vaghi, Zangarini, *Gianni Rodari e la Fantastica*, cit., p. 141.

⁶⁹ Rodari, *Grammatica della fantasia*, cit., p. 17.

⁷⁰ L'ideazione della *Torta in cielo* è del 1964 quando uscì a puntate sul «Corriere dei Piccoli», mentre il racconto sarebbe uscito da Einaudi in volume nel 1966.

comporre da subito orientata anche al versante critico e desiderosa di essere comprensibile per i giovani lettori.

In generale la riflessione di Rodari sulla propria arte letteraria è collegata al bisogno di rendere coscienti i giovani sulle possibilità espressive della lingua e degli spazi di libertà che la padronanza linguistica assicura a ciascuno. Su questo versante si osserva un'accentuata attenzione nel «Pioniere». Non mancano stimoli per sviluppare le competenze comunicative tramite la costruzione di giornalini⁷¹, raccogliendo in ciò l'eredità di Freinet e anticipando la successiva vicinanza al Movimento di Cooperazione Educativa. Sul periodico non mancano concorsi a premi che coinvolgono i lettori ad esprimere una valutazione dei loro testi scolastici⁷², o ancora l'accostamento curioso alla grammatica con la rubrica «grammatica divertente»⁷³ che anticipava il più noto Professor Grammaticus del *Libro degli errori*⁷⁴.

All'interno di tale intenzionalità, nel 1953 si situa un singolare articolo dal titolo *Vi insegno a inventare una storia*⁷⁵ dove Rodari in forma dialogica esemplifica ai lettori del «Pioniere» il processo ideativo di una narrazione, utilizzando proprio il binomio fantastico costituito da una formica e un elefante, cioè «il più grosso e il più piccolo»⁷⁶ tra gli animali. L'azione narrativa ha origine nel momento in cui «per andare avanti bisogna gettare l'uno addosso all'altro i nostri due personaggi e stare a vedere che cosa succede»⁷⁷. Lo scrittore fa chiaramente riferimento al «duello tra parole», quale espressione evocativa del dinamismo narrativo che si può generare nell'associazione tra termini con caratteristiche di significato distanti. Le osservazioni rodariane non sono a questo punto ingenua. Si ipotizza la situazione ovvia che nello scontro immediato l'elefante avrebbe la meglio e quindi si consiglia di rimandare temporaneamente lo «scontro», provando «a cominciare da un'altra parte»⁷⁸, inserendo una descrizione. Si prepara così il terreno per l'azione che poi segue lo schema esopico della favola *Il topo e il leone*. Già un decennio prima, Rodari aveva appuntato sul noto scartafaccio «ricetta per un racconto»⁷⁹ dove

⁷¹ Si pensi all'invito presentato sul «Pioniere» a costituire un *Giornale di reparto* dove accanto all'intento di creare nei «Pionieri» la coesione di gruppo nel divulgare le informazioni, si assiste a vere e proprie lezioni di giornalismo sull'impostazione grafica e di stile, nelle scelte editoriali e di processo di realizzazione. Cfr., *Il giornale di reparto*, «Pioniere», n. 12, 23 marzo 1952, p. 11; *Il giornale di reparto*, «Pioniere», n. 13, 30 marzo 1952, p. 11.

⁷² Magister, *Il mio libro di lettura, Secondo concorso nazionale di composizione*, rubrica «La pagina dello scolaro», «Pioniere», n. 19, 10 maggio 1953, p. 15; *I nostri corrispondenti*, rubrica «Lo scolaro in vacanza», «Pioniere», n. 25, 21 giugno 1953, p. 15.

⁷³ Si registra la presenza di uno spazio *La grammatica divertente* dal 1953 con brevi raccontini divertenti su alcune regole grammaticali presentati anche sotto forma di indovinello.

⁷⁴ G. Rodari, *Il libro degli errori*, Torino, Einaudi, 1964.

⁷⁵ G. Rodari, *La formica e l'elefante*, «Pioniere», n. 47, 29 novembre 1953, p. 2.

⁷⁶ *Ibid.*

⁷⁷ *Ibid.*

⁷⁸ *Ibid.*

⁷⁹ Vaghi, Zangarini, *Gianni Rodari e la Fantastica*, cit., p. 148.

si immaginava che la costruzione di una storia fosse una sorta di «minestra speciale» della quale erano indicati gli ingredienti ma non si era soffermato sul legame consequenziale degli stessi giungendo rapidamente a presentare il brano *La pianta delle pantofole*⁸⁰. Mentre la dimensione processuale è più ampiamente trattata nell'articolo sul «Pioniere», grazie anche alla forma dialogata che immagina di interpellare direttamente il lettore e di raccogliere le sue provocazioni. La singolarità dell'articolo consiste nell'aver messo a tema la costruzione di un testo narrativo rivolgendosi ai bambini e dunque facendo affidamento sulla loro possibilità di cogliere i meccanismi pigri del testo per continuare loro stessi a narrare storie. Questa intenzionalità educativa rodariana di rendere il bambino protagonista del proprio percorso di lettore e narratore fantastico al tempo stesso, trova uno spazio specifico di elaborazione critico-letteraria attraverso la tecnica del «finale aperto».

Il finale aperto

Se già la storia *La pianta delle pantofole* rinviava ai lettori la possibilità di ideare una conclusione, in realtà negli anni Cinquanta sul «Pioniere» non pare che Rodari usi di frequente il finale aperto, mentre risulta semmai già aperta la trama narrativa di alcuni racconti apparsi sul «Pioniere» nel 1959 i quali sarebbero poi entrati a far parte delle *Favole al telefono*⁸¹. Negli anni '60 si assiste ad un progressivo avvicinamento a tale scelta stilistica prima di diventare stabilmente utilizzata in *Tante storie per giocare*⁸² e di essere oggetto di riflessione sistematica nella *Grammatica della fantasia*⁸³. Si può infatti menzionare a questo proposito la poco nota commedia teatrale *Caccia a Nerone* del 1965 che si chiude ironicamente con l'invito ai lettori a poter «aggiungere tutti gli atti che cred[ono]»⁸⁴. Il testo uscito sul «Pioniere» è in realtà una mirabile sintesi dei frutti ormai maturi dell'officina letteraria rodariana. La commedia è infatti costruita attorno ad un' »insalata di favole» con chiari riferimenti a Tofano per la coesistenza divertente di maschere della Commedia dell'Arte, del personaggio storico di Nerone, di un rappresentante di stufe e di un improbabile scienziato. Non mancano le «contaminazioni» rispetto a testi precedenti ed è altresì presente il «binomio fantastico» passato-presente in grado di generare una situazione nuova e paradossale. Rodari giunge alla fase conclusiva della vita del «Pioniere» avendo sperimentato un ventaglio significativo di tecniche di

⁸⁰ *Ibid.*, p. 149.

⁸¹ Si pensi ad esempio a *I marciapiedi mobili*, «Pioniere», n. 47, 29 novembre 1959, p. che entra con il titolo *Il marciapiede mobile* nelle *Favole al telefono*.

⁸² G. Rodari, *Tante storie per giocare*, Roma, Ed. Riuniti, 1971.

⁸³ *Id.*, *La grammatica della fantasia*, cit., pp. 61 ss.

⁸⁴ *Id.*, *Caccia a Nerone*, «Pioniere», n. 29, 4 febbraio 1965, p. 8.

scrittura e contribuendo ad alimentare un repertorio assai ampio di personaggi e di situazioni al quale nel tempo sarebbe tornato ad attingere fondendoli in nuove e imprevedute costruzioni linguistiche.

Affascinato dalle potenzialità espressive del linguaggio, sin dalla collaborazione al «Pioniere» Rodari mostra chiaramente il suo rapporto disinvolto e ludico con la scrittura confermando di fatto l'espressione di «fabbricante di giocattoli» che si sarebbe attribuito qualche anno prima di morire⁸⁵. Le storie scritte per l'infanzia sono ritenute dall'autore «giocattoli» capaci di muovere il pensiero divergente infantile e per questo già in sé destinati ad essere travalicati da ulteriori racconti autonomamente elaborati dal giovane lettore. Il dono della parola inverato dall'artista nella scrittura consente al testo di non chiudersi in se stesso ma di aprirsi al nuovo apporto che può offrire il lettore in un continuo oltre di invenzioni e di significati e così «il giocattolo avrà cessato di essere tale per diventare vita, il libro apparterrà per sempre al vissuto, all'esperienza del bambino. In fin dei conti non vogliamo mica bambini al servizio dei libri, ma libri al servizio dei bambini»⁸⁶. Il progetto di elaborazione poetica può dirsi compiuto poiché la validità formale della parola è consegnata al suo legittimo destinatario, il bambino, affinché sia nutrimento dell'anima e via di crescita autentica.

⁸⁵ G. Rodari, *Autopresentazione. Un fabbricante di giocattoli*, Mostra del libro italiano per l'infanzia e la gioventù, Monaco di Baviera 1977.

⁸⁶ *Ibid.*

Boarding schools as means to educate children from remote districts in Finland

A micro-historical study of the role of the student hall of residence in Sodankylä, 1943-1972

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ABSTRACT: In Finland for almost one hundred years until the 1990s, student halls of residence have provided accommodation near schools to 7-15-year-old pupils who lived faraway. This study focuses on the second widest municipality of Finland, Sodankylä, and countryside pupils' possibility to study. The target period of this study covered the year of establishment of the first secondary school of Sodankylä in 1943 until 1972 when the comprehensive school system was introduced. The purpose is to describe the life span of the secondary schools of Sodankylä with special focus on the role of the student hall of residence. The following research questions were set for this study: (1) How was schooling realized in remote municipalities before the establishment of student halls of residence? (2) How was the operation of student hall of residence launched in Sodankylä? (3) What was the significance of student hall of residence for pupils and the secondary school in Sodankylä? The perspective is educational-historical and the approach of this study was micro-historical. The data were comprised of legislation concerning student halls of residence and archival sources related to secondary schools of Sodankylä and were gathered from the National Archives in Helsinki and Municipal Archives of Sodankylä in 1943-1972. The student hall of residence played a key role in providing pupils from remote district with a chance to select from various educational opportunities. The establishment of rural coeducational schools

and their becoming as paths to university studies is a good example of what kinds of results a strong belief in education, wide-ranging co-operation and civic activity could lead.

TEE/EET KEYWORDS: Boarding school, student hall of residence, coeducational school, educational equality

Introduction

During the twentieth century, connected comprehensive school systems were developed and expanded in all Nordic countries. A comprehensive school system in Nordic terms refers to a unified school system where all pupils, despite academic and economic backgrounds and resources, are enrolled in the same age-based school¹. The ‘classical period’ from 1945 until about 1970 is often referred to as the golden era of social democracy and the main objective was to involve the school in the realization of social goals such as equal opportunity and community fellowship².

The Second World War changed schooling in many countries. In German, school reforms were designed to produce a new generation of young Germans cognizant of their responsibilities as citizens and committed to strengthening the new democratic state³. Central and Eastern Europe and the Baltic states also pursued developing the residential folk high school model inspired by the Nordic example of comprehensive schooling – for example in Poland, Hungary, Estonia, Latvia and Lithuania – but the current economic and social conditions in these post-communist societies make it difficult to operate residential folk high schools⁴. The war hit also Soviet Union countryside: the demographic impact translated into a heavier work burden on the youngest citizens, and it negatively impacted their ability to continue their education⁵.

In Finland, Emperor Alexander the II gave the command for establishing the contemporary elementary school in 1866 and Uno Cygnaeus (b. 1810-d.1888) was selected to plan the elementary school. The curriculum that was based on

¹ I. Carlgren, K. Klette, S. Mýrdal, K. Schnack, H. Simola, *Changes in Nordic teaching practices: From individualised teaching to the teaching of individuals*, «Scandinavian Journal of Educational Research», vol. 50, n. 3, 2006, pp. 301-326.

² A.O. Telhaug, O.A. Media, P. Aasen, *The Nordic model in education: education as part of the political system in the last 50 years*, «Scandinavian Journal of Educational Research», vol. 50, n. 3, 2006, pp. 245-283.

³ B.M. Puaca, *Navigating the waves of change: political education and democratic school reform in postwar West Berlin*, «History of Education Quarterly», vol. 48, n. 2, 2008, pp. 244-264.

⁴ J. Kulich, *Residential folk high schools in Eastern Europe and the Baltic states*, «International Journal of Lifelong Education», vol. 21, n. 2, 2002, pp. 178-190.

⁵ A. Livschiz, *Pre-revolutionary in form, Soviet in content? Wartime educational reforms and the postwar quest for normality*, «History of Education», vol. 35, n. 4-5, 2006, pp. 541-560.

Herbart-Zillerist pedagogy emphasized the importance of stirring up pupils' interest in hobbies that would develop their diligence and the development of strong and decent character. A common goal was also to strengthen pupils' regionalism and nationalism. Religion, literature, and history hold a central position at school. The task of the school was to turn Finns into a unitary nation through civilizing and educating the young nations' people⁶. During the Second World War, Finland was building its national identity. For a nation that had just gained its autonomy, it was essential to solidify Finnish language and Finnish education. Schooling and school systems have proved repeatedly to be key devices for the development and transmission of a sense of nationhood, or national identity⁷.

But how to provide education for all in a sparsely-populated country like Finland? Small multi-grade schools in countryside villages hold a unique position in the history of education because it was the dominant model for teaching before industrialization and urbanization⁸. Village schools still are an important organizational model in many suburban and countryside areas across Finland⁹. At the time of post-war reconstruction and poverty, it was still not possible to reach every child and provide them with various educational opportunities.

Boarding schools or schools with a student hall of residence became one option. Boarding schools had been familiar already in Europe, for example in France and England¹⁰ and in Portugal¹¹. Commonly, boarding schools were to enhance the role of education in the progress and development of the country. Boarding schools are viewed as especially suitable for remote areas where populations are dispersed although it dislocates children from their home communities¹².

⁶ A. Anttonen, *Vocabularies of citizenship and gender: Finland*, «Critical Social Policy», n. 18, 1998, pp. 355-373, DOI: 10.1177/026101839801805605; M. Paksuniemi, S. Uusiautti, K. Määttä, *Teetotalism as the core of education at the elementary school teacher training college of Tornio, Finland*, «History of Education & Children's Literature», vol. 7, n. 1, 2012, pp. 389-411; M. Satka, *Making social citizenship: conceptual practices from the Finnish poor law to professional social work*, Jyväskylä, University of Jyväskylä, 1995.

⁷ R. Lowe, *Education and national identity*, «History of Education», vol. 28, n. 3, 1999, pp. 231-233.

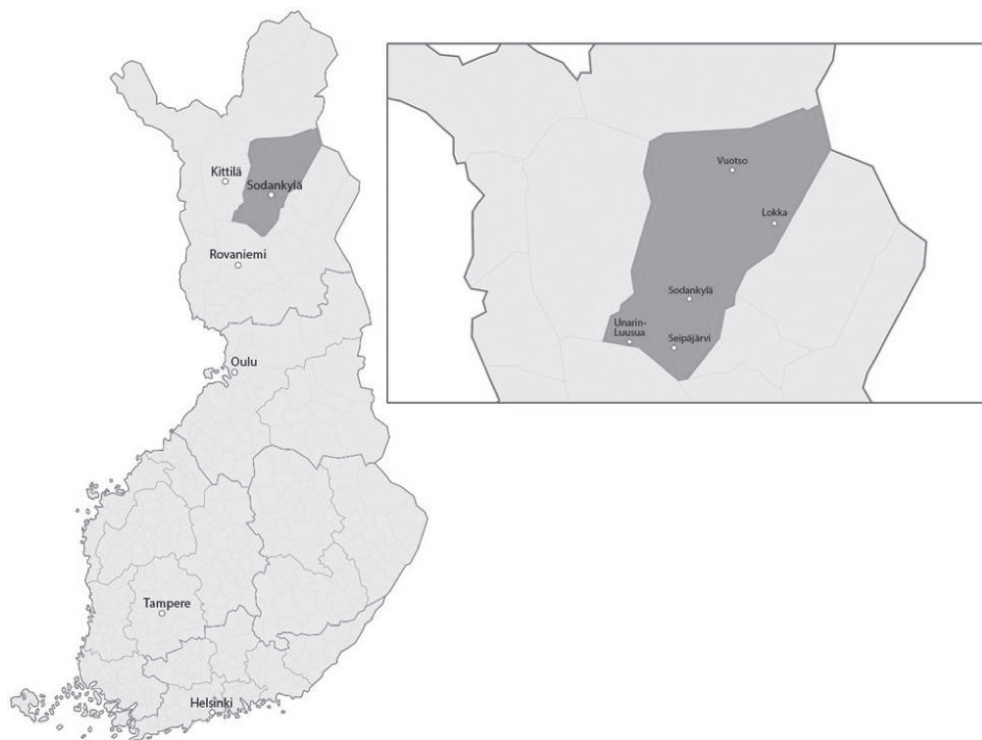
⁸ D.A. Harrison, H. Busher, *Small schools, big ideas: primary education in rural areas*, «British Journal of Educational Studies», n. 43, 1995, 384-397.

⁹ M. Kilpimaa, K. Määttä, S. Uusiautti, *What is the future of village schools? A case study on the life cycle of a school in Northern Finland*, «Review of European Studies», vol. 4, n. 1, 2012, pp. 125-137, DOI: 10.5539/res.v4n1p125.

¹⁰ C. de Bellaigue, *Behind the School Walls: The School Community in French and English boarding schools for girls, 1810-1867*, «Paedagogica Historica», vol. 40, n. 1-2, 2004.

¹¹ M.J. Mogarroat, S.A. Martínez, *Unprotected girls and teacher training in Portugal in the second half of the nineteenth century*, «Paedagogica Historica», vol. 45, n. 1-2, 2009, pp. 117-128.

¹² G.A. Postiglione, *Dislocated education: The case of Tibet*, «Comparative Education Review», vol. 53, n. 4, pp. 483-512.



Pic. 1. The municipality of Sodankylä and the map of Finland.

Nowadays, boarding schools¹³ are not familiar to Finnish comprehensive school pupils. In Finland for almost one hundred years until the 1990s, student halls of residence did, however, provide accommodation near schools to 7-15-year-old pupils who lived faraway¹⁴. Although halls of residence

¹³ In this article, the concept of boarding school refers to a school where pupils had a chance to accommodate in a student hall of residence. In Finland, not all pupils of boarding schools lived in the school premises and therefore, we mostly use the concept ‘the student hall of residence’ when referring to pupils’ actual accommodation building. In this study, a special focus was on co-educational secondary schools, representing a higher level education after elementary school, and therefore, we prefer mentioning the school type within the text, instead of just general ‘boarding school’ that does not include any reference to the school level, pupils gender (in Finland, girls and boys studied together), or whether all pupils or just some accommodated at school.

¹⁴ T. Hyvärö, *Oppilasasuntolat kansalaiskasvattajina* [Student halls of residence as citizens’ educators], Finnish Educational Research Association, 2007, <<http://arkisto.kasvatus.net/kasvatustieteenpaivat2007/Hyyro.pdf>>.

functioned alongside schools, their importance in educational purposes is little studied in Finland. Maire Ukkola-Willman has studied the issue at the University of Lapland in 2005¹⁵.

This study was focused on the second widest municipality of Finland (see Pic. 1), Sodankylä (12,415 km²), and the possibility to study among pupils who lived remote villages. The target period of this study covers the year of establishment of the first secondary school of Sodankylä in 1943 until 1972 when comprehensive school was introduced.

1. Method

The purpose of this study is to dissect challenges of education before the establishment of student halls of residence in 1943-1972 and to describe the operation of a student hall of residence as a part of secondary schooling in 1962-1972 in Sodankylä, Finland.

The following research questions were set for this study:

1. How was schooling realized in remote municipalities before the establishment of student halls of residence?
2. How was the operation of student hall of residence launched in Sodankylä?
3. What was the significance of student hall of residence for pupils and the secondary school in Sodankylä?

The perspective is educational-historical and the approach of this study was micro-historical¹⁶. The approach is manifested in the restricted phenomenon that is the target of the study, a student hall of residence in Sodankylä and related individual, ordinary people whose life is studied at the concrete level. The study uses a specific 'low-level look' which is typical of micro-historical

¹⁵ M. Ukkola-Willman, "Asuntola jätti pysyvät jäljet": oppilasasuntola kasvattajana 1960-70-luvulla ["The student hall of residence left permanent marks": Student halls of residence as an educators in the 1960s and 1970s], Master's thesis, Rovaniemi, University of Lapland, 2005.

¹⁶ See e.g. N.Z. Davis, *Sosiaalishistorian haasteet* [Challenges of social history], in M. Rahikainen (ed.), *Matkoja moderniin. Lähikuvia suomalaisten elämästä* [Excursions to the modern. Portraits of Finns' life], Helsinki, Finnish Historical Society, 1996, pp. 9-17; C. Ginzburg, *Johtolankoja. Kirjoituksia mikrohistoriasta ja historiallisesta metodista* [Leads. Writings about the micro history and historical method], Tampere, Gaudeamus, 1996; A. Heikkinen, *Ihminen historian rakenteissa. Mikrohistorian näkökulma menneisyyteen* [A human being within the structures of history. The micro-historical viewpoint to the past], Helsinki, Helsinki University Press, 1993; G. Levi, *On microhistory*, in P. Burke (ed.), *New perspectives on historical writing*, Pennsylvania, Pennsylvania State University Press, 2001, pp. 97-119; E. Muir, *Introduction: Observing trifles*, in E. Muir, G. Ruggiero (edd.), *Microhistory & the lost peoples of Europe*, London, The Johns Hopkins University Press, 1991, pp. vii-xxviii; P. Rantala, V. Kinnunen (edd.), *Pottuvoita ja banaanipuita. Mikrohistoriaa pohjoisesta* [Mashed potatoes and banana trees. Micro history from the north], Rovaniemi, Lapland University Press, 2010.

research and then, the viewpoint is widened to a more general level. The starting point was social as the purpose was to study the significance of student halls of residence to the community and individual people. A secondary-school pupil who accommodates in a student hall of residence represents a part of his or her local community.

The data were comprised of legislation concerning student halls of residence and archival sources related to secondary schools of Sodankylä and they were gathered from the National Archives located in Helsinki and Municipal Archives of Sodankylä in 1943-1972. The number of sources is not considered as important as the way they are read and interpreted in micro-historical research. The sources were studied minutely and carefully to find details and hidden meanings that can be interpreted in various ways. In this study, archives were analyzed for example to find local reasons and objectives behind the decision of the establishment of student halls of residence.

2. Results

2.1. *Education in Sodankylä before the student hall of residence 1943-1962*

A private coeducational school was established in Sodankylä in summer 1943¹⁷. The purpose was to provide the children of Sodankylä secondary education that was only available in neighboring municipalities, Kittilä, Rovaniemi, Kemijärvi, and even Oulu or Tampere¹⁸. The main goal was to have as many talented children as possible to secondary education in the coeducational school in their own municipality. However, the wide extent of the municipality of Sodankylä hindered children from going to school. The school was located at the centrum of the population center and the range from the remotest villages of the municipality to the center was almost 100 km (~63 miles) as the crow flies. By contemporary routes, commutes were even longer. If parents wanted to educate their children in the private coeducational school, they had to procure accommodation from the centrum. That might be a room in relatives' or friends' homes or a rented room in some of the centrum houses. Only the wealthiest could afford this for their children. However, since the school was located in their own municipality, education was a little more affordable than to go to schools in other municipalities. Therefore, the number of pupils in the secondary school of Sodankylä increased considerably¹⁹. The coeducational

¹⁷ NAH, NBE II Aaa 15; Daa 52; Ea 15.

¹⁸ MAS, ESB Ca: 1; Da: 1.

¹⁹ MAS, CSS, Ba: 1.

school supporters' association tried to give handouts to pupils from families of the most limited means but they did not cover the accommodation costs sufficiently²⁰.

During the post-war reconstruction period, pupils from remote villages had especial trouble in getting to school. The population center of Sodankylä was destroyed so totally during the Lapland War that only seven houses and both churches were spared. As people returned from evacuation, the coeducational school was re-opened relatively quickly in a reconstruction hut but children who needed accommodation could not be provided with any²¹. The coeducational school supporters' association started to apply to Foreign Relief Administration for construction support. On January 1948, it granted a two-million-FIM relief to Sodankylä and Pello coeducational secondary schools funded by United Nations Relief and Rehabilitation Administration²². According to the annual report, this grant was regarded as relatively insignificant because the inflation: the value of money had dropped significantly since the original application was written²³. Likewise, the construction plans had changed suddenly. The Council of State had decided that an experimental municipal secondary school could start in Sodankylä at the beginning from the study year of 1948-1949²⁴.

In January 1946, the Finnish parliament had passed a law regarding the establishment of middle school as a part of elementary education in experimental purpose²⁵. Sodankylä applied for permission to start the school already in the first application round in 1946 and the municipality was given the permission in 1948. The application was conducted by the coeducational school supporters' association and the newly-established municipal board of elementary education. A municipal secondary school was important because pupils across the wide municipality could attend the school regardless of their parents' social status²⁶. After getting the permission, the coeducational school supporters' association of Sodankylä considered it wise to make it a common cause with the municipality of Sodankylä and let it take care of the construction of the school building²⁷. The board of coeducational school applied to Foreign

²⁰ MAS, MC&MEB, Ca: 2.

²¹ S. Ahto, *Aseveljet vastakkain. Lapin sota 1944-1945* [Comrades-in-arms fighting against each other. The Lapland War 1944-1945], Helsinki, Kirjayhtymä, 1980, p. 268; J. Kallioniemi, *Suursodan loppunäytös pohjoisessa. Lapin sota 1944-1945* [The final stage of the great war in the north. The Lapland War 1944-1945], Raisio, Teospiste, 1989, p. 224; NAH, NBE II, Eh 164; MAS, CSS.

²² MAS, MC&MEB, Eb: 1; ESB, Ea: 1.

²³ NAH, NBE II, Eh 178.

²⁴ MAS, MC&MEB, Eb: 1.

²⁵ *Laki kansakouluun kuuluvan keskikoulun ja ammatillisen jatkokoulun perustamisesta kokeilutarkoituksessa* [Law on the establishment of experimental secondary school and vocational school as a part of elementary schooling] (28/10 Jan 1946). Finlex database: <<http://www.edilex.fi/saadokset/smur/19460028>>.

²⁶ MAS, ESB, Da; NAH, NBE III, Aa 39; Ea 20; Da 103.

²⁷ NAH, NBE II, Eh 178.

Relief Administration for permission to use the two-million-FIM grant for the construction of a student hall of residence²⁸. Two coeducational secondary schools worked so that the private coeducational school gradually stopped one grade at a time while the municipal school added one grade at the time so that in the spring 1952 the last pupils graduated from the private coeducational secondary school²⁹.

The student hall of residence was discussed in the elementary school board meetings. Already in the first fall semester, the board noted that fifteen pupils had over fifteen kilometers' long school commute. Accommodation possibilities were still lousy in the population center and the school board decided to suggest the building of a student hall of residence³⁰. The suggestion was under consideration by the municipal council of Sodankylä and returned to the school board to be re-prepared as further specifications were needed, for example concerning the size of the hall of residence³¹. At that time, the construction of center elementary school was not finished yet and a large school building was to be built in the western part of the municipality, in the village of Syväjärvi. Municipal authorities were not yet certain of the level of municipal resources these two construction sites would need. Namely, it was pointed out in the municipal annual of the following year that the Council of State did not grant as much subsidies for school building projects as it used to <https://posti.ulapland.fi/owa/> - endnote17³². Therefore understandably, the municipality wanted to first finish the unfinished construction projects before taking new ones. The municipal council did not deny the need for a student hall of residence but necessitated careful plans that would likely guarantee the state subsidy.

The school head invoked the statute³³ according to which long school commutes or parents' limited means should not hinder talented children from studying. However, in Sodankylä, they did set an obstacle during the first years after the municipal school was established. For example in the first year when the secondary school had five grades, some pupils had to stop their studies because of the difficulties in finding accommodation. Some of the talented elementary school pupils from remote villages had not even applied to the secondary school because they were aware of the lack of accommodation possibilities and expenses. Not even the municipal hospice and accommodation relief could cover all the costs <https://posti.ulapland.fi/owa/> - endnote19³⁴. The necessity of

²⁸ MAS, HSS; CSS, Da: 1.

²⁹ MAS, HSS; CSS, Dc: 1.

³⁰ MAS, ESB, Ca: 1.

³¹ MAS, MC&MEB, Ca: 3.

³² MAS, MC&MEB, Df: 1.

³³ *Opetusministeriön päätös kansakouluun kuuluvan keskikoulun ja ammatillisen jatkokoulun järjestämisestä kokeilutarkoituksessa* [The decision of the Ministry of Education on the establishment of experimental secondary school and vocational school as a part of elementary schooling]. (751/29 Oct 1946).

³⁴ MAS, MSS, Dc: 1.

a hall of residence was discussed in the joint meeting of the elementary school board, municipal school authorities, and teachers but they could not make any decisions³⁵.

In the spring 1956, School Counselor Urho Somerkivi inspected the secondary school. He presented the results of inspection shortly at the elementary school board meeting and in detail in his inspection report afterwards. He had paid attention to the fact that pupils did not represent equally the various school districts of the municipality. In his opinion, this was mainly due to the lack of a student hall of residence. Somerkivi emphasized that talented children who lived in remote villages should have the possibility of attending school and therefore, the student hall of residence should be built³⁶.

2.2. The establishment of the student hall of residence in 1962

The Municipal Council and Municipal Executive Board discussed the issue of building a student hall of residence, brought up by School Counselor Somerkivi. The Council made a unanimous decision that secondary school pupils should have as functional accommodation and transportation as possible. However, as they could not yet have their own student hall of residence, they were accommodated in rental rooms. The organization of accommodation was left to the Municipal Executive Board³⁷. The Elementary School Board helped the Municipal Executive Board find suitable rented apartment but none was available in the population center of Sodankylä. Instead, private owners offered accommodation and thus over 30 pupils from remote villages became accommodated. Some of the pupils could come to school by bus and the municipality made an agreement about transportation of elementary and secondary school pupils with one private car driver³⁸.

At the beginning of the 1960s, the Municipal Executive Board appropriated loan and relief for construction purposes. The municipality could build secondary school buildings and a student hall of residence³⁹. The secondary school board was asked for opinions on furnishing of the school building and student hall of residence. The Municipal Executive board also financed school board's excursion to Rovaniemi, to see the student hall of residence of Nivavaara elementary school⁴⁰. When construction and furnishing work

³⁵ MAS, MC&MEB, Ca: 1.

³⁶ MAS, MC&MEB, Ca: 2; ESB Ea: 1.

³⁷ MAS, MC&MEB, Ca: 4.

³⁸ MAS, MC&MEB, Ca: 2; Cb: 5.

³⁹ MAS, MC&MEB, Ca: 5; Cb: 6.

⁴⁰ MAS, MC&MEB, Cb: 6.

had reached appropriate stage, the secondary school could move in the new facilities on February 1962. Simultaneously, the student hall of residence was opened offering accommodation for 88 pupils from remote villages⁴¹.

During the first year, School Counselor Kanerva wrote in his inspection report: «The student hall of residence is located at the immediate vicinity of the school providing accommodation for 120 pupils (most rooms for four people). The student hall of residence and the school are equipped with all modern amenities»⁴². Newspaper *Lapin Kansa* wrote about the introduction of the secondary school building and student hall of residence: «The availability of new schooling facilities and student hall of residence will affect especially the remote villages as pupils are able to come to school better than before. The student hall of residence has diminished the financial burden of homes»⁴³.

In all, the secondary school operated almost two decades before the municipality of Sodankylä could afford building the school building and student hall of residence for pupils from remote villages. The next results chapter introduces the work in the student hall of residence in practice.

2.3. *The student hall of residence as a part of secondary school education*

2.3.1. *The student hall of residence: plan of action*

The student hall of residence did not function separate from school but shared the educational goals of the secondary school. Annual plans of action and reports were composed for the student hall of residence including pupils daily program, student care and help, daily menu, pupils' work program, and the division of work between the attendant of the hall of residence and her assistants. The daily program during the first full study year was as follows:

- 6.30 a.m. Wake-up, morning wash, making the bed
- 7.00 a.m. Breakfast, pupils help clean the diner
- 8-9 a.m. Room cleaning, studying and rehearsal
- 9 a.m.-4 p.m. Lessons, free exercise outdoors
- 4 p.m. Dinner, pupils help clean the diner
- 5-7 p.m. Homework, going out when having finished homework. Hobbies.
- 7 p.m. Evening tee, pupils help clean the diner
- 7.15-8 p.m. Exercise outdoors if not any arranged program
- 8-9 p.m. Evening hour of devotion, evening wash. Silence.

⁴¹ MAS, MSS, Ca: 1.

⁴² MAS, MSS, Db: 1.

⁴³ Lapin Kansa newspaper, 24 May 1962.

Student care included taking care of cleanliness and pupils were familiarized with careful morning and evening wash routines. Pupils went to sauna and changed clothes once a week and beds were changed every third week. Health care and nursing and the measurements of height and weight were a part of student care together with educational care and manner and order instruction. The latter was described as follows: «The purpose is to raise responsible, honest, well-behaving, and order- and discipline-obeying decent citizens. The goal is to instill good habits of everyday life. Education follows the Christian spirit»⁴⁴.

2.3.2. *Pupils' daily life*

Pupils had the right to have beddings and bedlinen. They had a seven-day menu that included all dining mentioned in the daily program. Pupils' work program included kitchen work – helping clean the diner – that took place every second week in turn after dining. Likewise, pupils cleaned their rooms every second week and dried shower rooms after morning and evening wash. Pupils did their homework either in groups or alone, supervised by the attendant. Older pupils helped quiz the homework. Within the realms of possibility, pupils could do pottering and handicraft in the student hall of residence. They could ski and exercise outdoors, play ball games, and listen to the radio and play various parlour games insider during their free time. The work division between the attendant and her assistants was realized so that the attendant supervised homework and free time activities and took care of pupils' health and cleanliness and general issues at the student hall of residence. Assistants prepared meals, cleaned, and helped in practical duties and child rearing⁴⁵. The plan of action was similar in the following study years, too. The menu had some changes and pupils had more free time activities. According to the plan, shared evening gatherings with pre-determined show that pupils had to practice were arranged at the hall of residence⁴⁶.

2.3.3. *The facilities*

Originally, the student hall of residence had 32 rooms. In addition, it had a diner, kitchen, two sanitarium, four assistant's room, and the attendant's apartment. The kitchen functioned also as the school kitchen <https://posti.ulapland.fi/owa/>

⁴⁴ MAS, MSS, Df: 1.

⁴⁵ MAS, MSS, Df: 1.

⁴⁶ MAS, MSS, Df: 1.

- endnote³²⁴⁷. After three years of operation, the secondary school board suggested that it would be necessary to build a salon and pottering facilities to increase pupil amusement⁴⁸. In addition to the premises, the annual report included information about the number of pupils accommodated in the student hall of residence, the equipment and personnel and their education. Moreover, the actions to raise pupils and increase their amusement were reported⁴⁹.

The student hall of residence had a library. According to the attendant, pupils «had as much to read as they wanted to». Newspapers and journals were ordered so that the library had even 12 publications of various fields. The annual report could include the attendant's wishes concerning salaries and premises as well as mentions of parents' satisfaction with the operation of the student hall of residence⁵⁰.

2.3.4. *The attendant as the responsible person*

The year 1958 elementary school decree defined the attendant's qualification. According to the decree, the attendant of the student hall of residence should have graduated as a home economics teacher or have the attendant's degree from the elementary school seminar. In addition, the attendant must be female⁵¹. The Sodankylä attendant had the attendant's degree. Her assistants had graduated from secondary school, catering school, folk high school, Folk Academy, or household school. In addition, some assistants had had taken an attendant course. One of the years, the assistant was a high-school graduate, household technician, socionom, and youth leader⁵². It seemed that adults at the student hall of residence had been qualified for their job.

2.3.5. *The pupil selection*

Pupils were selected to accommodation based on their parents' application⁵³. As more and more pupils applied and were accepted to the school, more strain was set for the student hall of residence. The secondary school board had to arrange wider pupil transportation so that more pupils could attend school and

⁴⁷ MAS, MSS, Df: 1.

⁴⁸ MAS, MSS, Ca: 1.

⁴⁹ MAS, MSS, Df: 1.

⁵⁰ MAS, MSS, Df: 1.

⁵¹ *Kansakouluasetus* [Decree on elementary education], (321/23 July 1958).

⁵² MAS, MSS, Df: 1.

⁵³ MAS, MSS, Ca: 1.

live at home⁵⁴. Those pupils who accommodated at the student hall of residence had free transportation at the beginning and at the end of the semester and at the time of longer holidays⁵⁵.

Given that some of the pupils who lived at the student hall of residence were only 11 years old, it was not a surprise that the possibility of visiting home more often was considered. At the beginning of the fall semester of 1964, one of the representatives of remote villages proposed the Municipal Council that pupils' transportation should be arranged once a month⁵⁶. On December 1964, the elementary education regulation was added by a partial compensation for pupils' travel costs from the student hall of residence to home and back once a month. The National Board of Education confirmed the change in regulation⁵⁷.

2.3.6. *Pupils' behavior was supervised*

As the student hall of residence formed a part of the secondary school, the punishments regarding violations of the rules of behavior were the responsibility of the school. Every now and then, minor offenses such as rude and inappropriate behavior and damages were discussed at the secondary school teacher meetings⁵⁸. It seemed that the attendant's and assistants' supervision was not enough to prevent pupils from doing damage at the student hall of residence. In some plans of action, the attendant had defined the teaching of manners in the following way: «Good manners are taught, pupils are supervised to prevent 'bad habits' from gaining a foothold in pupils of the student hall of residence. In all we do, the goal is to make pupils understand that self-discipline is the best discipline»⁵⁹. Regardless of these goals, pupils who were outside the reach of their parents' watching eye could commit to something that they might not have done at home. Indeed, over a hundred youngsters living together was not something that everyone could adjust to and adjustment problems could manifest themselves as behavioral problems.

At the beginning of 1968, the secondary school board considered covering the travel costs of pupils' weekend visits to home. Several parents had been requesting that because in neighboring municipalities, Kittilä and Rovaniemi, the municipality did cover the weekend visits. The school board concluded that for the personnel's work and older pupils' supervision, it would be reasonable. The elementary school regulation had to be altered to include the weekend

⁵⁴ MAS, MSS, Ca: 1.

⁵⁵ *Kansakouluasetus* [Decree on elementary education], (321/23 July 1958).

⁵⁶ MAS, MC&MEB, Ca: 6.

⁵⁷ MAS, MC&MEB, Ca: 6.

⁵⁸ MAS, MSS, Cb: 3.

⁵⁹ MAS, MSS, Df: 1.

travel costs in the regulations⁶⁰, although the acceptance of the National Board of Education did not come straight away⁶¹. Especially the number of boys' hobbies had increased at the student hall of residence along the years including even basketball, wrestling, and swimming⁶², but still the wish to go home for weekends was understandable.

2.4. *The student hall of residence was necessary even after the end of secondary school*

During the last years of operation, the study week was first shortened into 6 days, from Monday to Saturday and finally into five days, from Monday to Friday⁶³. Little by little, schooling in Sodankylä started to turn into comprehensive education first by trying a five-day school week⁶⁴. Although routes and school transportation had improved considerably during the years, the need for a student hall of residence did not totally disappear. From the remotest villages, daily commute from home to school and back would have been too hard, as it would have taken hours every day.

The secondary schools of Sodankylä were recessed in 1972 when comprehensive education was introduced in Finland. However, the student hall of residence was still in use. Pupils from the remotest villages came to school from the border area of the municipality, Seipäjärvi, Luusua of Unari, Lokka, and Vuotso (see Pic. 1), even from over 100 km (~63 miles). Now, the student hall of residence provided comprehensive school pupils with accommodation. As new schools were established in the municipality of Sodankylä, the number of pupils living in the student hall of residence decreased in 1985 until at the beginning of the 1990s there were none. New schools in the north and east of Sodankylä were established⁶⁵. The student hall of residence in Sodankylä, which was called *student home* along with the introduction of comprehensive education⁶⁶, provided pupils with accommodation, healthy meals, supervised

⁶⁰ MAS, MSS, Ca: 2.

⁶¹ MAS, MC&MEB, Ca: 9; Ca: 10.

⁶² MAS, MSS, Df: 1.

⁶³ MAS, MSS, Df: 1.

⁶⁴ MAS, MC&MEB, Ca: 2.

⁶⁵ J. Lassila, *Lapin koulutushistoria – kirkollinen alkuopetus, kansa-, perus- ja oppikoulut* [The school history of Lapland – religious early education, elementary, comprehensive and secondary schools], Doctoral diss., Oulu, University of Oulu, 2001, p. 135; H. Orava, *Kunnan uudistuva rooli opetussuunnitelmatyössä. Sodankylän kunta* [The reforming role of the municipality in curriculum planning], in S. Kinon (ed.), *Uudistuva peruskoulu. Peruskoulun opetussuunnitelmien laadinta* [Reforming comprehensive school. The creation of the core curriculum of comprehensive education], Helsinki, National Board of Education, 1994, pp. 33-42.

⁶⁶ *Peruskoululaki* [Act on Comprehensive Education] (476/27 May 1983). Finlex Database:

studies and homework, and the possibility of having versatile hobbies for almost thirty years. Only a few pupils would have had this chance in their home village.

3. Discussion

Before the establishment of the student hall of residence, the municipality of Sodankylä was considered not able to sufficiently support poor pupils from remote villages in their secondary school education. The number of pupils from remote villages was under half of all first-grade pupils. Along the student hall of residence established in 1962, the relative proportion of these pupils increased. In addition, almost every year the secondary school had pupils from each school district of Sodankylä⁶⁷. Having the student hall of residence helped, therefore, pupils from remote areas attend the secondary school.

Dr. Tuula Hyyrö has described in her article *Oppilasasuntolat kansalaiskasvattajina* ('Student halls of residence as educators of citizens') that schooling was in many ways more demanding to children from remote districts than to children of population centers. According to Hyyrö, living and studying in an unfamiliar place requires adaptability, tolerance, consideration, and respect for others. Life in the student hall of residence taught invaluable civic skills to these pupils⁶⁸. Indeed, the plans of action and educational goals of the Sodankylä student hall of residence included the very same civic skills Hyyrö mentioned.

Based on the punishments given at the secondary school, not all pupils adapted the above-mentioned civic skills immediately but they had to practice them over and over again. Naturally, some of the youngest children, especially, felt homesick but the attendant and assistants tried to alleviate it with motherly caring and refreshing hobby activities. The municipality helped by offering the possibility of visiting home in weekends. The student hall of residence had a key role in providing pupils from remote district with a chance to select from various educational opportunities. Although the student hall of residence operated only 29 years, it managed to serve numerous children.

In all, this kind of a micro-historical study provided a unique insight into the educational development in Finland and especially its sparsely populated areas in the North through the Sodankylä example case. Archival sources reveal the

<<http://www.finlex.fi/fi/laki/alkup/1983/19830476>>.

⁶⁷ I.-K. Lakkala, *Sodankylän oppikoulut vuosina 1943-1972* [Secondary schools in Sodankylä between 1943 and 1972], Doctoral diss., Rovaniemi, University of Lapland, 2011, p. 358.

⁶⁸ T. Hyyrö, *Oppilasasuntolat kansalaiskasvattajina* [Student halls of residence as citizens' educators], Finnish Educational Research Association, 2007.

courses of action and decisions made at the school and municipal levels and practical action at school and the student hall of residences. Simultaneously, they illustrate the contemporary trends, national spirit, and efforts, and help understand the Finnish school history and roots of today's education.

Conclusion

In the Finland of today, we have achieved top scores in international comparisons, for example the Programme for International Student Assessment (PISA) by OECD⁶⁹. The latest news about the Finnish success is probably the expert evaluation reported by Newsweek where Finland was assessed as the best country in the world. Attention was paid on education, health, quality of life, dynamics of economy, and political environment. Unquestionably, one of the reasons for these achievements is the nine-year-long comprehensive education that covers all children regardless of their place of domicile or parents' social status – all are provided with free school transportation and study equipment⁷⁰. The rise of Finland from post-war material penury and reconstruction era into one of the most developed countries is mainly to the credit of comprehensive education. The Finnish comprehensive education is based on the thought that everyone should have equal educational opportunities. Children cannot be divided into talented and not talented according to their place of domicile and parents' socio-economic status. Educational equality is something that we have to cherish – even if it might not always seem economically profitable⁷¹. And this does not concern only children of comprehensive education but also high school and higher education students. For example, an international comparison made by Canadian Higher Education Strategy Associates (2010) showed that Finnish youth have the most equal opportunities to study in higher education as their parents' income and education affected the least their possibilities⁷².

In the whole country, private secondary schools took pivotal care of the education of Finnish-speaking, country children and especially girls. They also offered a chance to a higher social status for children from working-

⁶⁹ S. Kupiainen, J. Hautamäki, T. Karjalainen, *The Finnish education system and PISA*, Helsinki, Ministry of Education, 2009, <http://www.pisa2006.helsinki.fi/files/The_Finnish_education_system_and_PISA.pdf>.

⁷⁰ Cfr. N.L. Waldron, J. Mcleskey, Establishing a collaborative school culture through comprehensive school reform «Journal of Educational and Psychological Consultation», 20, 2010, pp. 58-74, DOI: 10.1080/10474410903535364

⁷¹ A. Datnow, *Happy marriage or uneasy alliance? The relationship between comprehensive school reform and state accountability systems*, «Journal Of Education For Students Placed At Risk», vol. 10, n. 1, 2004, pp. 113-138.

⁷² Helsingin Sanomat -newspaper, 28 Dec. 2010.

class families and peasantry. They increased educational equality socially and regionally⁷³. The establishment of rural coeducational schools and their becoming as paths to university studies is a good example of what kinds of results a strong belief in education, wide-ranging co-operation and civic activity could lead. Sodankylä was a part of this national pursuit of creating equal educational opportunities already in 1943 as the private coeducational school was established and the positive development was fostered by the student hall of residence.

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⁷³ J.-P. Pietiäinen, *Yksityisoppikoulut nuorena tasavallassa 1917-1944. Yksityisoppikoulut vaurastuvassa Suomessa 1944-1977* [Private secondary schools in the young republic 1917-1944. Coeducational secondary schools in prospering Finland 1944-1977], in J. Salminen, J.-P. Pietiäinen, J. Teperi (edd.), *Yksityisoppikoulujen historia 1872-1977* [The history of private secondary schools 1872-1977], Helsinki, Painatuskeskus, 1995, p. 112.

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From centralisation to decentralisation within the European educational context: the Greek example from 1980s to nowadays

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ABSTRACT: The purpose of this article is to study the educational reforms associated with the paradigm of primary and secondary education organisation in Greece. The interest of this study focuses on the character governing the area of education organisation and the way in which it has progressed from the 1980's until today in Greece. Does centralisation give way to decentralisation? The thorough investigation of the Greek educational reform discourse through the comparative historical analysis aims to highlight and interpret the 'discourse', as seen in the ideological, social, political and economic framework within which it forms a part. At a secondary level, the impact of the European Union education policies on this discourse is sought.

EET/TEE KEYWORDS: Primary School; Secondary Education; Administration; Educational Reform; European Dimension; Greece; XX Century.

Introduction

This article focuses on the systematic presentation and comparison of the educational reforms in Greece from the 1980s to the present day on the paradigm of education organisation. In particular, the basic components of the Greek reform discourse are sought between 1980 and the present day through a comparative historical analysis¹ of the institutional framework.

¹ A. Kazamias, *Η συγκριτική ιστορική ανάλυση. Στο Παιδαγωγική Ψυχολογική Εγκυκλοπαίδεια-Λεξικό* [The comparative historical analysis, in *Pedagogic Psychological Encyclopedia-Dictionary*],

The institutional texts related to the educational reforms and the paradigm of educational organisation in Greece are approached by applying the content analysis². The thorough investigation of the educational reform discourse in this country aims to highlight and interpret the ‘discourse’, as seen in the ideological, social, political and economic framework within which it forms a part (interpretative cycle)³. At a secondary level, the effect on this discourse is sought through the European Union education policies⁴.

The study of the institutional framework for educational reforms in a Southern European country (Greece) presents a particular interest. First of all, this country was chosen because of the importance given to the educational reforms. The educational system is based on a centralised state planning to organise and control education⁵. Certainly, the last reform efforts are oriented towards the administrative modernisation and the decentralisation, at least at the discourse level. Consequently, the interest resulting by the study of educational reforms on education organisation in Greece focuses on the character governing

Athens, Ellinika Grammata, 1992, Vol. 8, pp. 4428-4435 (in Greek). See also A. Kazamias, *Για μια νέα ανάγνωση της ιστορικο-συγκριτικής μεθόδου: προβλήματα και σχέδιασμα* [For a new lecture of the historic-comparative method: problems and draft], «Θέματα Ιστορίας της Εκπαίδευσης» [Issues in History of Education], n. 1, 2002, pp. 9-22 (in Greek).

² B. Berelson, *Content analysis in the communication research*, New York, Falmer Press, 1952. See also R. Weber, *Basic content analysis*, Newbury Park, CA., Sage, 1990.

³ I. Pirgiotakis, N. Papadakis, *Ερμηνευτική Μέθοδος γύρω από την εκπαιδευτική πολιτική και μεταρρύθμιση, ζητήματα αλήθειας και μεθόδου* [Hermeneutic method for the educational policy and reform. Issues of truth and method], in C. Charis, N. Petroulakis, S. Nikodimos (edd.), *Ελληνική Παιδαγωγική και Εκπαιδευτική Έρευνα* [Greek pedagogical and educational research], Athens, Atrapos, 1999, pp. 853-858 (in Greek).

⁴ S. Ball, *Big policies/small world: an introduction to international perspectives in education policy*, «Comparative Education», vol. 34, n. 2, 1998, pp. 119-130; A. Nóvoa, *Europe and Education: historical and comparative approaches*, in S. Bouzakis (ed.), *Ιστορικο-Συγκριτικές Προσεγγίσεις, Τιμητικός Τόμος: Ανδρέα Μ. Καζαμία* [Historic-Comparative Approches. A Volume in honour of Andreas M. Kazamias], Athens, Gutenberg, 2000, pp. 47-69 (in Greek).

⁵ Regarding the organisational models of education, in the centralised administration model (centralization), the state authority is centrally exercised upon the State's only recognized legal entity. The management of all administrative matters of local or central interest, general or specific competence, is vested in the central institutions or central departments. See A. Michopoulos, *Η εκπαίδευση στο πλαίσιο της οργανωτικής θεωρίας* [Education in the organizational theory context], Athens, Michopoulos Publishing, 1993, p. 62 (in Greek). The de-concentrated administration model (de-concentration) is defined by the transfer of decision-making powers to regional institutions, responsibilities that are exercised under the supervision or direction of the central political and administrative mechanisms. The de-concentration occurs within the centralised system framework and may be organised geographically or in terms of specialised services. See A. Andreou, *Θέματα οργάνωσης και διοίκησης της εκπαίδευσης και της σχολικής μονάδας* [Topics of organization and administration of the education and the school unit], Athens, Livanis, 1999 (in Greek), p. 170. The decentralised administration model (decentralisation) is at the opposite end of concentration or the centralised system. The term decentralisation is defined as the transfer of powers and responsibilities from the central mechanisms of power to a local/regional level. See L. Bierlein, *Controversial issues in educational policy*, Newbury Park, CA., Sage, 1993, p. 39.

this area and the way in which it has been progressed from the 1980's until today; does centralisation give way to decentralisation?

The choice of the relatively extended period has resulted from the need to conduct a first recording of the probable evolution of educational reforms in primary and secondary education organisation in Greece. The 1980s was chosen to open our study because a movement of educational reforms started at the beginning of this decade (Law 1566/1985) and continues till today, aimed at modernising the education system. Furthermore, various political forces successively rose to power during this period and it is interesting to investigate whether there were differences or coincidences in their educational policy. Specifically, the choice of time limits may be substantiated by both the political as well as the educational point of view. In terms of the political point of view, it is defined as the interval from the onset of normal political and parliamentary life in Greece. On 1st January 1981, the treaty pursuant to which Greece was accepted as the tenth member of the European Community came into effect. This event has affected the post-war Greek economy and society more than any other event⁶. From an educational point of view, the 1980s were chosen as the beginning of the period of study considering that it is a decade where the educational interest in Greece focuses on the democratisation of education, on the extension of compulsory education and on equal opportunities for all students⁷. The educational landscape changed in the mid 1990s, with the prevalence of concepts such as education quality, efficiency and effectiveness⁸. The new targets now set by the European Union and the intense wind of the decentralisation movement that blows in Europe in the 1990s, with new forms of administration and policy being exercised, affects Greece⁹. 2011 is considered as the limit for the period being examined because the last effort for education reform in the organisation example was passed in Greece in that year (Law 3848/2010 and Law 4027/2011). The choice of primary and secondary education was made on the basis of its general nature, in an effort to record all of the educational reforms on the paradigm of educational organisation.

⁶ T. Veremis, G. Koliopoulos, *Ελλάς, η σύγχρονη συνέχεια, από το 1821 μέχρι σήμερα* (B' εκδ.) [Greece, the modern sequel. From 1821 to the present (2nd ed.)], Athens, Kastaniotis, 2006 (in Greek), p. 458.

⁷ A. Vinokur, *Les politiques nationales d'éducation entre le global et le local*, in M. Cosio, R. Marcoux, M. Pilon, A. Quesnel (edd.), *Éducation, famille et dynamiques démographiques*, Paris, CICRED, 2003, pp. 31-54.

⁸ S. Bouzakis, *Σύγχρονες τάσεις στη διεθνή εκπαίδευση, μια συγκριτική προσέγγιση της συντηρητικής στροφής στην εκπαίδευση* [Current trends in international education, a comparative approach of the conservative shift in education], in S. Bouzakis (ed.), *Συγκριτική Παιδαγωγική III* [Comparative Pedagogy III (4th ed.)], Athens, Gutenberg, 2006, pp. 227-272 (in Greek).

⁹ S. Bouzakis, *Εκπαιδευτικές μεταρρυθμίσεις 1974-2004: έγιναν, γίνονται* [Educational reforms 1974-2004: they happened, they are happening?], in D. Charalampous (ed.), *Μεταπολίτευση και εκπαιδευτική πολιτική, παρελθόν-παρόν-μέλλον* [Metapolitefsi and educational policy, past-present-future], Athens, Ellinika Grammata, 2007, pp. 71-80 (in Greek).

1. *Organisation – administration of the Greek educational system*

As far as the organisation of the Greek educational system is concerned, article 16 in the 1975 Greek Constitution (as revised in 1986/2001 and which is still valid to the present day) clearly set out the state's dominant role in education, by stipulating that «education is a key mission of the State»¹⁰. More specifically, the education policy in Greece is predominantly carried out by the Ministry of Education and Religious Affairs, Culture and Sports (Y.PAI.TH.P.A.)¹¹, which is assisted in its work by several organisations with a specialised mission and action, organisations supervised by the Ministry.

During the 1980's decade, the framework law 1566/1980 «Structure and function of primary and secondary education and other provisions» was prevailed in the educational landscape. The education policy is directly connected to the system for educational control and, consequently, to the education administration system. In fact, the rapporteur for the reform framework of this law affirms that «the concern for education is a State matter [...] the state must ensure all the necessary requirements and means for the proper functioning of education. Education is not only a capital good but also an end in itself»¹². Certainly, the same report notes that the ownership and management of school assets is handed over to social control. The management of school property, the handling of the repairs for school buildings and the handling of operating expenses is passed on to local authorities, to which the necessary funds are transferred, through the prefectural councils (*ibid.*). The running costs for schools are addressed by government grants to local government, which is responsible for the disposal and management of the relevant appropriations (article 40, Law 1566/1985).

Concerning the administration, this follows the administrative division of the country in the shape of the Ministry – prefectures (Education Directorates) – Municipalities (education offices) – school level. Together with the new organisation and administration of the school property, instruments of popular participation are built and democratic planning in education and training is

¹⁰ Since the establishment of the new independent Greek state (1828), the central government undertook the key role of developing a single education policy and this centralised nature of the Greek educational system has been retained until the modern era. See OECD, *Reviews of National Policies for Education: Greece*, Paris, Organisation for Economic Co-operation and Development, 1982; B. Charlot, *L'école en mutation: crise de l'école et mutation sociale*, Paris, Payot, 1987; Greek transl. *Το σχολείο αλλάζει, κρίση του σχολείου και κοινωνικοί μετασχηματισμοί*, Athens, Protaseis, 1992.

¹¹ Formerly the Ministry of Education, Lifelong Learning and Religious Affairs (Y.P.D.B.M.TH); it changed its name pursuant to P.D. 85/12 (OGG 141 A/21-6-2012). Before that change, the Ministry had been named Ministry of National Education and Religious Affairs (Y.P.E.P.TH.) for a long period (1974-1979); it changed its name to Y.P.D.B.M.TH pursuant to OGG 2274, volume B 7-10-09, decision no: 2876.

¹² See detailed Explanatory Report of Law 1566/1985.

introduced. Article 48 (Law 1566/1985) establishes the National Education Council (E.SY.P.) to study educational problems and draw up recommendations for their resolution. This Council is comprised of representatives from local government, educational, scientific and other social organisations and recommends educational policy issues at all levels of education to government. Articles 49 and 50 form prefectural education committees at the prefecture level, local and municipal education committees at the municipality or community level, as well as provincial education committees, where provinces and provincial councils are formed. These bodies are composed of representatives of institutions, such as E.SY.P, and exercise their respective responsibilities for educational matters in their area. Article 51 set up a school council at every school while article 52 refers to the function of the school committee at every school, which is the management committee for operating costs. Accordingly, Law 1566/85 introduced an initial decentralisation process ('deconcentration') with the delegation of responsibilities relating to schools and to local authorities.

In the 1990s, serious changes do not happen in the educational landscape concerning the organisation and administration. On the contrary, in the 2000s, under Law 2986/2002 on the «Organisation of regional services of primary and secondary education, evaluation of the teaching work and staff, teachers in-service training and other provisions», the regional primary and secondary education services were organised, consisting decentralised agencies of the Ministry of Education and exercising administration in the region. More particularly, the policy framework implemented for decentralising education institutionalised the Regional Education Directorates at a regional level (P.D.E.)¹³, whose competences cover primary and secondary education. At a prefectural level, the administration is exercised by the Directorates¹⁴ and the Primary/Secondary Education Offices¹⁵, the Regional Councils and the Education Committees. The Prefectural Education Committees also operate on the same level, as central prefectural bodies, which are constituted by the Prefects and are competent for establishing and operating schools at a prefecture level. The local and municipal education committees operate at the municipality level. At the local level, the school unit is restricted to administrative responsibilities within the framework of school units.

¹³ The Regional Education Directorates are provided under article 14, paragraph 29 pursuant to Law 2817/2000 (OGG A' 78), which report directly to the Minister of National Education and Religious Affairs. There are 13 Regional Directorates. Also refer to article 1 pursuant to Law 2986/2002.

¹⁴ The Primary and Secondary Education Directorates in the prefectures and countries are provided under Article 56 pursuant to Law 1566/1985 (OGG A' 167) and Article 6 pursuant to Law 2043/1992 (OGG A' 79) and come under their respective Regional Education Directorate.

¹⁵ The Primary and Secondary Education Offices in the prefectures and countries are provided under Article 56 pursuant to Law 1566/1985 and come under the respective Regional Education Directorate of the prefectures and countries.

The subsequent Law 3852/2010 «New Architecture of Local Government and Decentralised Administration – Kallikratis Programme», which still has not been fully implemented, transfers to the municipalities further competencies in education: competencies to grant an establishment license/operation of institutions, their control and supervision as well as the appointment of Board of Directors members (Chapter VI, article 94, Law 3854/2010). In the text of announcements by the Ministry of Education on the «New School» (plan of action that was approved by the Ministerial Council on 04.03.2010, for «Free, public and high quality education for everyone»), which is a general guidelines document, we read in section I, constituting a brief summary of the features of the «New School», that the aim is a

school open to society, in a harmonious link with the Local Government's New Architecture [...] the New School is connected to local society. It is the school where everyone has an institutional and essential role: the teachers, the parents, the student's themselves and the local government. The nation's new administrative structure is the basis for a new relationship between education and the local community, by transferring new competences to the framework of the Constitution¹⁶.

Law 3848/2010 attempts to upgrade the administration of education. This Law is framing a series of legislative initiatives involving the formation of the institutional framework for implementing the «New School» programme. In general, the above trends and goals are embossed in the 2007-2013 National Strategic Reference Framework (NSRF – IV CSF), in the «Education and Lifelong Learning» Operational Programme, where the first strategic objective includes the «reform, modernisation and decentralisation of the educational system», with decentralisation being a challenge at an administrative and operational level in order to strengthen social cohesion¹⁷.

Finally, with the last law 4027/2011 «Greek language education abroad and other provisions», the Primary and Secondary Education Directorates as well as the Primary and Secondary Education Offices are repealed, restricting the regional administrative levels (from 2 to 1) and drawing up a simple and flexible structure. Till then, the number of the Primary and Secondary Education Directorates and Offices was extremely large (450), with particularly high running costs. The goal is to decentralise the competencies, enhancing the role of regional structures in education administration. In addition, the available resources could be used in the best way possible, streamlining the regional administrative structure.

¹⁶ Refer to «To a new school from today where the student comes first», official website of the YP.D.B.M.TH, Last modified April 1, 2012, <http://www.minedu.gov.gr/index.php?option=com_content&view=article&id=402&Itemid=785&lang=el> (last access: March 4th, 2011).

¹⁷ Refer to the official website in relation to the National Strategic Reference Framework, Last modified April 1, 2012, <<http://www.espa.gr/el/Pages/default.aspx>> (last access: February 20th, 2011).

2. A first interpretive approach

In Greece, many reforms have been attempted to address the crisis in education. However, the course of educational reform can be metaphorically likened to the myth/curse of Sisyphus, i.e. a continuous, laborious and incomplete attempt¹⁸.

More specifically, the philosophical framework of the Greek education has been defined through the debate of two basic and controversial ideological movements, the traditional and the innovative one. Indeed, the Greek education has been evolved through the bipolar scheme, reform and counter-reform¹⁹. Tradition and progressivism are in conflict and sometimes converge in the educational framework, generating a complex system of relations and interactions over the years. In general, the educational evolutions did not happen independently of the socio-political processes. On the contrary, the ideological and political developments, in a constant dialectical relationship, had considerably identified the developments in the education area²⁰. Two basic characteristics of the Greek education system could be explained through the claims of the ideological-political forces: the centralisation as well as its ideological (instead of the practical) orientation.

For Samatas²¹, the education system in Greece, as a mechanism of the state, is bureaucratic, centralised and hierarchically organised at least until the 2000s. Furthermore, it functions as a system of political – ideological control of education. Despite any institutional improvements, the education system continues to be centralised²² where few essential administration competencies

¹⁸ A. Kazamias, *Η κατάρα του Σίσυφου στην ελληνική εκπαιδευτική μεταρρύθμιση, 1964-2000: μια κοινωνικο-πολιτική και πολιτισμική ερμηνεία* [The Curse of Sisyphus in Greek Educational Reform, 1964-2000: A Sociopolitical and Cultural Interpretation], in S. Bouzakis (ed.), *Πανόραμα Ιστορίας της Εκπαίδευσης: Όψεις και απόψεις* (Τόμος Β') [Panorama of history of education: Aspects and views (Vol. B)], Athens, Gutenberg, 2011, pp. 299-322 (in Greek).

¹⁹ A. Dimaras, *Η μεταρρύθμιση που δεν έγινε* [The reform that has never happened], Athens, Ermis, 1974 (in Greek).

²⁰ I. Pirgiotakis, *Συμβολή στη μελέτη της ελληνικής εκπαιδευτικής ιστορίας και της ελληνικής εκπαιδευτικής πολιτικής: ένα σχέδιο ταξινόμησης και ερμηνείας του ιστορικού υλικού* [Contribution to the study of Greek educational history and Greek educational policy: a classification and interpretation of historical material], in S. Bouzakis (ed.), *Πανόραμα Ιστορίας της Εκπαίδευσης: Όψεις και απόψεις* (Τόμος Α') [Panorama of history of education: Aspects and views (Vol. A)], Athens, Gutenberg, 2011, pp. 43-68 (in Greek).

²¹ M. Samatas, *Ο ελληνικός εκπαιδευτικός γραφειοκρατισμός, μια κοινωνικοπολιτική θεώρηση της γραφειοκρατούμενης ελληνικής εκπαίδευσης* [The Greek educational bureaucratism, a sociopolitical view of the Greek bureaucratic education], in A. Kazamias, M. Kassotakis (edd.), *Ελληνική εκπαίδευση: προοπτικές ανασυγκρότησης και εκσυγχρονισμού* [Greek education: prospects for reconstruction and modernization], Athens, Seirios, 1995, pp. 120-149 (in Greek).

²² M. Πλιου, *Εκπαιδευτική και κοινωνική δικαιοσύνη* (Γ' έκδοση) [Educational and social justice (3rd ed.)], Athens, Poreia, 1990 (in Greek), p. 179; P. Poulis, *Δίκαιο της εκπαίδευσης* [Law of education], Athens, Sakkoulas, 1999 (in Greek), p. 43; C. Saitis, *Οργάνωση και διοίκηση της εκπαίδευσης* [Educational organization and administration (3rd ed.)], Athens, Atrapos, 2002, p. 202 (in Greek).

have been transferred to the local/school level; the central authority determines the administrative framework for the operation of the schools, prepares the content of school programmes, monitors the evaluations and regulates centrally the recruitment of the teaching staff. Accordingly, the education policy is produced only at the administration's apex (Ministry). Numerous laws and circulars regulate every detail of the school operations, by allowing little room for creative initiatives and depriving the system of the necessary flexibility and adaptability in rapidly changing conditions. In spite of the efforts to decentralise the educational system attempted in the 1980s, within the framework of a broader effort to modernise and democratise the educational system, this education policy could be partially implemented, with the role of local government being consultative.

The result of the centralised policy is the creation of obstacles in implementing the policies that service the local needs. At an administrative level, the problems plaguing the administration of Greek education are the bureaucratic nature, the non-rational management of structures and human/material resources, the defective communication between the structures and organizations as well as the executive role of managers²³. The educational 'crisis' has been attributed to the system's chronic 'pathologies' and to the lack of the Greek educational system's modernisation²⁴ in relation to the changes and developments in the international and European area to which Greece belongs.

Nevertheless, the system is lately called upon to become more functional and adaptable to the changes and challenges introduced by the European and international socio-politico-economic area²⁵. It is recommended to re-organise, rationalise and upgrade the system for organising and administering education

²³ A. Andreou, G. Papakonstantinou, *Εξουσία και Οργάνωση-Διοίκηση του εκπαιδευτικού συστήματος* [Power and organization – Administration of the educational system], Athens, Livanis, 1994 (in Greek).

²⁴ For Iliou (*Εκπαιδευτική και κοινωνική δικαιοσύνη* (Γ' έκδοση) [Educational and social justice, cit.]), the Greek educational identity is formed by the combination of three factors: the accumulation of the system weaknesses and the problems that these lead to, their extent and intensity and their long duration. Furthermore, Saitis argues that the Greeks reformers seek to modernize the educational system through traditional administrative mechanisms and formalistic work methods, which prevents the success of the reform efforts. See C. Saitis, *Διοικητική μεταρρύθμιση στην ελληνική εκπαίδευση, 1976-1996* [Administrative reform in Greek education, 1976-1996], «Νέα Παιδεία» [New Paideia], n. 81, 1997, pp. 109-120, p. 117 (in Greek).

²⁵ A. Kazamias, E. Zambeta, E. Karadjia, *Educational Reform 2000 – Towards a paideia of open horizons – the modern Greek Sisyphus*, in S. Limplad, T. Popkevitz (edd.), *Education governance and social integration and exclusion: studies in the powers of reason and the reasons of power. A report from the EGSIE project*, Upsala, Upsala Universitet, 2001; D. Mattheou, *Νέες οριζόντες και οριζμοί του εκπαιδευτικού έργου στην εποχή της ύστερης νεωτερικότητας. Η προβληματική της εκπαιδευτικής πολιτικής σε αναμηλάφηση* [New horizons and definitions of the educational task in the post-modernist era. The problematique of the educational policy in review], in Id. (ed.), *Η εκπαίδευση απέναντι στις προκλήσεις του 21ου αιώνα, νέες οριζόντες και προοπτικές* [Education facing the challenges of the 21st century, new horizons and perspectives], Athens, Livanis, 2002, pp. 43-58 (in Greek).

through the principals of decentralization, responsibility, transparency, accountability, quality and flexibility. This framework redefines the meaning of the area (international/local) as well as the competencies of the national states. It appears that government entities are changing because of the permeability of their borders; additionally, their role in the international system is being weakened (restriction of national sovereignty) through the transfer of competences to supranational formations²⁶. Change is being observed even within nation-states with the allocation of more powers to the region (decentralisation), the promotion of locality and the reconsideration of the public sphere/public property²⁷. At an education level, the national educational policy seems to be influenced by both the orientations of the supranational organisations (OECD, UNESCO and the World Bank)²⁸ and the creation of supranational formations (European Union)²⁹. According to Stamelos³⁰, the «territorialisation» of the national educational system has been observed in two directions: super-national (globalization and ‘Europeanization’ of the EU Member States) and sub-national (region, ‘locality’ and decentralisation).

During the last decade, some efforts have been made in order to modernise the Greek educational system, putting emphasis on decentralisation. Indeed, Law 3848/2010 attempts to upgrade the administration of education. Together with the nation’s new administrative structure through the Kallikratis Programme³¹, it sets the objective for the ‘decentralisation/regionalization’ of

²⁶ M. Albrow, *The global age. State and society beyond modernity*, California, Stanford University Press, 1997.

²⁷ R. Holton, *Globalization and the Nation State*, London, MacMillan, 1988.

²⁸ The World Bank considers that the state is the necessary medium for developing the proper economic and social function. But this is not what creates growth. It participates in formulating the conditions for development, by taking on the role of the ‘catalyst’ and ‘facilitator’ for social and economic forces (World Bank, *World development report 1997*, New York, Oxford University Press, 1997).

²⁹ G. Pasiás, I. Roussakis, *Οι σχηματισμοί λόγου της ευρωπαϊκής κοινότητας και οι επιδράσεις τους στη διαμόρφωση της ελληνικής εκπαιδευτικής πολιτικής. Μελέτη περίπτωσης: τα ΕΠΕΑΕΚ 1 και 2 και η εκπαιδευτική μεταρρύθμιση 1997-2001* [The discourse formation in the European community and its impact in the Greek educational policy. Case study: the ΕΠΕΑΕΚ 1 and 2 and the educational reform 1997-2001]. Paper presented at the 2nd Scientific Congress History of Education, October 4-6, 2002, Patras, Greece (in Greek).

³⁰ G. Stamelos, *Παγκοσμιοποίηση και εκπαίδευση: ο εκπαιδευτικός αποκλεισμός σήμερα* [Globalization and education: the educational exclusion today]. Paper presented at the 2nd Scientific Congress History of Education, October 4-6, 2002, Patras, Greece (in Greek).

³¹ Greek Law 3852/10 (OGG 87/volume Α’/2010) reformed the administrative division of the country and re-established the administrative unit institutions, their election and competencies. Key aspects of the program is to reduce the number of municipalities and legal persons by approximately 2/3, to replace 57 prefectures as secondary Local Government Authorities from the 13 regions, to change the funding, to increase the term of office for local authority bodies from 4 to 5 years and to assign new competencies to them. «Kallikratis» is considered to be a continuation of the «Kapodistria» Programme (officially with Law 2539/97). With this administrative restructuring of the country, the rule in Greece, described as highly centralised (OECD, *Economic survey of Greece, 2009. Policy Brief*, OECD Publishing, 2009), is directed in

school education, combining the administrative reform (a state with modern decentralised structures, restricted to its executive responsibilities) to education reform. Therefore, further competencies are transferred to the municipalities in the field of education. The aim is to connect the school to the local society, with an education system that will respond to every region's needs, with many decisions being made at a municipal and regional level. In addition to the regionalisation of school education, the precise law seeks to restrict the levels of administration (by reinforcing the Ministry's executive role) and to develop a simple and flexible structure in a functional equivalence to the education system. At the school unit level, a central objective is the reinforcement of autonomy and its conversion from an authority with exclusively executive competencies to a fertile receptive authority, shaping an educational policy. It also promotes support for the autonomy of school units in the budget and the management of appropriations for operating costs based upon their needs and planning, in accordance with the self-evaluation procedure.

Thus, there is provision to transfer a range of competencies. Nonetheless, the transfer of competencies is not followed by the corresponding transfer of resources, a fact that has its concerns regarding the success of this policy. Regarding the transfer of the operating costs for the school units to the municipalities, the question is how will the Municipalities manage to meet the financial needs given the very low percentage of the state budget allocation to education? Will the fundraising be directed outside the state budget, by seeking funds from donors, from new municipal taxes or contributions by parents? Furthermore, there is the possibility of exerting pressure on the schools themselves to find resources, with consequences to the program and curriculum diversification and, ultimately, to the school classification. In this sense, parents and students may be considered as 'consumers' and 'clients' of educational services. The potential de-regulation of enrolments and the differentiation in the funding of schools may lead to the operation of public schools under private economy criteria, in order to better adapt themselves to market needs. This concern is compounded by the potential expansion of socio-economic inequalities, especially between schools in rural and urban areas, since the smaller Municipalities will not be able to cope with their operating costs.

However, in addition to opening up the school to society, by decentralizing education, it appears that the new education policy seeks to freeze government spending on education, particularly significant during the period of economic crisis that Greece is going through. In fact, the issue of the fiscal problem that Greece is confronting is particularly important. The economic downturn intensified in 2010 and 2011. Recently, with the changes to the Greek economic landscape, the pressure by troika to conserve resources is also affecting the field of education. In addition to reducing government spending on education and

establishing strong decentralized units in the region, having a purely developmental nature.

restricting the hiring of the required teaching staff, an additional measure being adopted is the change to the school map, through the merger of schools³².

In conclusion, the new decentralised administrative structure of Greece is the basis for a new relationship between education and the local community, by transferring new competences to the framework of the Constitution. Of course, the question persists: will the new plans for administering education support the school or will we once again be confronted with the internal redistribution of the state's activities?³³ In every case, we adopt the view of Pirgiotakis³⁴, according to which the educational reforms should cease to be unilateral and short-term reforms. Terzis³⁵ has taken the same line, stressing the need for an 'institutional' education policy, putting aside the exercise of a 'personal' policy, centred upon the Minister³⁶. The most significant aspect in order to establish a single, common and acceptable long-term education policy is to envisage the educational system as a 'whole', regardless of the value and the significance of various measures that can be taken for each level³⁷.

3. *The European impact*

After the return to democracy, Greek education had been in a situation of an «extremely restrictive fashion» from the society who was pressing for changes because of the accumulated deadlocks and the country's effort to adapt itself to the socio-political conditions prior to its accession to the European Community³⁸.

³² At the primary education level, 1523 schools are being merged into 672 schools while at the secondary education level 410 schools are being merged into 205 schools. Decision No: 29988/Δ4, OGG 440B/18/03/ 2011.

³³ A. Ifanti, *Συγκεντρωτισμός και προσπάθειες αποκεντρωτικών πολιτικών στη διοίκηση της εκπαίδευσης στην Ελλάδα* [Concentration and efforts for decentration policies in the Greek educational administration], in Bouzakis (ed.), *Πανόραμα Ιστορίας της Εκπαίδευσης: Όψεις και απόψεις* (Τόμος Β') [Panorama of history of education: Aspects and views (Vol. B)], cit., pp. 735-750 (in Greek).

³⁴ I. Pirgiotakis, *Θετικές πλευρές του ελληνικού εκπαιδευτικού συστήματος: η αμφισβήτηση, ο λόγος και ο αντίλογος* [Positive aspects of the Greek educational system: the challenge, the discourse and the riposte], in Charalampous (ed.), *Μεταπολίτευση και εκπαιδευτική πολιτική, παρελθόν-παρόν-μέλλον* [Metapolitefsi and educational policy, past-present-future], cit., pp. 81-98 (in Greek).

³⁵ N. Terzis, *Μελέτη της εκπαίδευσης του νεοελληνισμού, πριν από το κράτος- έξω από το κράτος – στο κράτος* [Education's study of the neo-hellenism. Before the state – out of the state – in the state], Thessaloniki, Kiriakidis, 2010, p. 364 (in Greek).

³⁶ See Dimaras, *Η μεταρρύθμιση που δεν έγινε* [The reform that has never happened], cit.

³⁷ G. Pagakis, *Εκπαιδευτική πολιτική, μια ανθρωποκεντρική-κοινωνική θεώρηση* [Educational policy, a social-humanistic approach], «Δημόσιος Τομέας» [Public Sector], n. 124, 1996, pp. 14-17 (in Greek), p. 16.

³⁸ Bouzakis, *Εκπαιδευτικές μεταρρυθμίσεις 1974-2004: έγιναν, γίνονται* [Educational reforms 1974-2004: they happened, they are happening?], cit., p. 74.

Law 1566/1985, with the provisions of education democratization and modernization as well as with the new institutions predicted (Educational Institute, Institutions of democratic planning, institution of the school counselor), constitutes basically the fundamental law for the general education, valid till today³⁹. It moves in the direction of the welfare state and it was related to the changing of the political scene – the rise of Socialist Party to power⁴⁰. More specifically, for the promotion of popular participation, Prefectural and Municipal Education Committees as well as School Committees were established while schools are passed on to the municipalities. Even though the competencies assigned by the state are not essentials but mostly operational, this measure could be considered as a first step of decentralisation towards local self-government of first grade. Furthermore, administration is dissociated from the scientific – pedagogical guidance: the heads of Regional Education Directorates and Education Offices took up the administrative duties while the school counselors took up the guidance tasks. Hence, through this law, the educational decentralisation and democratisation (participation, social control, creative planning) are promoted⁴¹.

During the 1990s, important changes in the field of new technologies are observed worldwide, with the economic and cultural globalisation becoming a reality⁴². This evolution having an impact on society that has been transformed into a ‘society of knowledge’, affecting also the Greek education system. Particularly since late 1990s and early 2000s, a period of ‘modernisation’ and ‘convergence’ to European models had been started⁴³. Reform efforts have not only a national but also a European orientation, at the same time with the attempts to resolve long-term structural weaknesses of the educational system.

In 2002, with Law 2986 on the «Organisation of regional services of primary and secondary education, evaluation of the teaching work and staff, teachers in-service training and other provisions» begins a more systematic effort for the decentralisation of the education system in comparison to the previous laws, because of the regional services’ establishment. Thereafter, in 2010, Law

³⁹ A. Karafillis, *Νεοελληνική εκπαίδευση, δύο αιώνες μεταρρυθμιστικών προσπαθειών* [Neo-Hellenic education, two centuries of reform efforts], Athens, Critiki, 2002 (in Greek).

⁴⁰ G. Flouris, G. Pasiias, (2007), *Πολιτικές της γνώσης και μεταρρυθμίσεις στα προγράμματα σπουδών στην Ελλάδα (1975-2005): μία κριτική προσέγγιση* [Knowledge policies and reforms in curricula in Greece (1975-2005: a critical approach)], in Charalampous (ed.), *Μεταπολίτευση και εκπαιδευτική πολιτική, παρελθόν-παρόν-μέλλον* [Metapolitetsi and educational policy, past-present-future], cit., pp. 203-246 (in Greek).

⁴¹ T. Chatzistefanidis, *Ιστορία της Νεοελληνικής Εκπαίδευσης (1821-1986)* [History of Neo-Hellenic education (1821-1986)], Athens, Papadima, 1986, p. 351 (in Greek).

⁴² UNESCO, *L'éducation: un trésor est caché dedans*, Paris, UNESCO-Éditions Odile Jacob, 1996; Greek transl. *Εκπαίδευση: ο θησαυρός που κρύβει μέσα της-έκθεση της διεθνούς επιτροπής για την εκπαίδευση στον 21^ο αιώνα* (προεδρία Ζ. Ντελόρ), Athens, Gutenberg, 1999.

⁴³ S. Bouzakis, *Εκπαιδευτικές μεταρρυθμίσεις στην Ελλάδα. Πρωτοβάθμια και δευτεροβάθμια γενική και τεχνικοεπαγγελματική εκπαίδευση* [Educational reforms in Greece. Primary and secondary general education and technical-vocational education], Athens, Gutenberg, 2005 (in Greek).

3848 promotes the idea of a «New School», a school where everyone has an institutional and essential role: teachers, parents, students and local government.

According to Charalampous⁴⁴, despite the serious ideological and political differences between the two parties – New Democracy and PASOK – it is possible to notice some elements of consistency and continuity as far as the education policy is concerned. This situation is particularly marked the last decade where the concern about quality and efficiency affects the Greek education policy's directions. The same opinion adopts Mavrogiorgos claiming that the two parties present a peculiar form of consensus in pursuit of educational policy⁴⁵ although the Greek educational scenery was frequently transformed to an arena of political and ideological conflicts as well as to a privileged area of policy⁴⁶.

Since the mid-1990s and particularly since 2000, Greece embraces the European educational priorities as EU member state. Giving priority to quality in education and training has become vital to the EU's competitiveness and to the preservation of its social model⁴⁷. As the European education policy priorities were made up also priorities of the Greek education policy, the concern for modernization, quality and efficiency is strongly expressed in the declarations and the reform measures of the two government parties. The purpose of the reform efforts is the modernization and the quality improvement of the Greek education system, responding successfully to current challenges and prospects. The national discourse gives way to the European one. With the passage of the Maastricht Treaty as the starting point, it would appear that the EU is seeking to develop a European educational space⁴⁸, which commences being implemented after the Lisbon Treaty. In the promoting European educational landscape, convergence and harmonisation are linked to the reduction of national competence; at the same time, flexibility and competitiveness emerge as key principles in educational practices. The need for decentralisation at a regional level is also promoted for the more efficient management of existing resources

⁴⁴ D. Charalampous, *Μεταπολεμική και μεταπολιτευτική εκπαιδευτική πολιτική: από την ασυνέχεια στη συνέχεια* [Postwar and metapoliteftiki educational policy: from the discontinuity to continuity], in Charalampous (ed.), *Μεταπολίτευση και εκπαιδευτική πολιτική, παρελθόν-παρόν-μέλλον* [Metapolitefsi and educational policy, past-present-future], cit., pp. 121-144 (in Greek).

⁴⁵ G. Mavrogiorgos, *Πολιτικές για την επαγγελματική ανάπτυξη των εκπαιδευτικών: συνέχεια, ασυνέχεια και αντιφάσεις* [Policies for the professional development of teachers], in Charalampous (ed.), *Μεταπολίτευση και εκπαιδευτική πολιτική, παρελθόν-παρόν-μέλλον* [Metapolitefsi and educational policy, past-present-future], cit., pp. 191-199 (in Greek).

⁴⁶ A. Fragoudaki, *Εκπαιδευτική μεταρρύθμιση και φιλελεύθεροι διανοούμενοι* [Educational reform and liberal intellectuals], Athens, Themelio, 1977 (in Greek); I. Pirgiotakis, *Η ελληνική εκπαιδευτική κρίση: μύθοι και πραγματικότητες* [The Greek educational crisis: myths and realities], in I. Kanakis, I. Pirgiotakis (edd.), *Παγκόσμια κρίση στην εκπαίδευση* [Global crisis in education], Athens, Grigoris, 1991, pp. 177-205 (in Greek).

⁴⁷ European Commission, *White Paper on education and training. Teaching and learning: towards the learning society*, COM (95) 0590-C4-0597/95, 1995.

⁴⁸ *Ibid.*

(human and material)⁴⁹. Ideological signifiers such as «quality of education», «efficiency», «effectiveness», «modernising administration» and «autonomy» play a leading part in the national educational discourse, deriving from the «competitive knowledge economy», objective that was raised by the European Commission in Lisbon in 2000⁵⁰. Therefore, over the last decades, Greece has clearly expressed the adoption of the European educational orientations⁵¹ through the change in the institutional framework orientation that governs the organisation and the administration of primary and secondary education. More precisely, the attempt to enrol national education to the European commitment framework has begun to appear clearly after 2000 (with Law 2986/2002 and subsequently with Laws 3467/2006 and 3848/2010).

Conclusions

Further to the hereinabove analysis it arises that Greece, previously centralised, has evolved towards a decentralised model through a reduction of the state's competencies, the assignment of further administrative tasks to the middle levels and an increase to the competencies of schools. In general, Greece has paid emphasis to the international opening of its educational system and administration. This is realised within the framework of globalising reforms that defines a movement of convergence guidelines and means of action, currently noted amongst different school systems⁵².

In conclusion, the recent policies in Greece have led to a new educational system model. The rationale under which reform efforts have been attempted is the priority attributing to the quality of education, to modernisation and to efficiency. The undertaking of decentralization measures is presented as a result of these reforms together with the localisation of educational activity, the effort

⁴⁹ Refer in detail to the Commission's Communication of 10th January 2003 «Investing efficiently in education and training: an imperative for Europe» [COM (2002) 779 final] <http://europa.eu/legislation_summaries/education_training_youth/general_framework/c11066_el.htm>, last modified: May 11th, 2006 (last access: February 10th, 2012).

⁵⁰ Refer also to the Commission's Communication to the Council and to the European Parliament of 8th September 2006, «Efficiency and equity in European education and training systems» [COM (2006) 481 final]. According to this communication, when the Member States undertake reforms of their education and training systems, greater emphasis must be laid in education and training policies on the principles of efficiency and equity. These regulations change gradually and in depth the traditional forms of transactions between the state, the local government, the educational institutions of all levels and the persons; the State gradually withdraws from the management game by providing priority to freedom but without putting aside the principle of equality.

⁵¹ The effects of European educational discourse on Greek national educational policy are perceived even through the name change of the Education Ministry.

⁵² H. Buisson-Fenet, *L'administration de l'éducation nationale*, Paris, Puf, 2008, p. 83.

to reinforce the school unit as an organization of fruitful and critical reception, the more appropriate allocation of resources and the promotion of flexibility, participatory administration and evaluation⁵³. In general, the traditional foundations of the state-trainer are weakened and a «neo-liberal turning point» is attributed to education, which is recognised through the analysis of public policies⁵⁴. The question of sovereignty of the nation states with the parallel strengthening of transnational coalitions as well as the development of regional policies make the role of local communities and local government particularly important⁵⁵. This framework adopts the undertaking of decentralisation measures and the strengthening of local government. Of course, the level to which these measures have been adopted varies in every country, and in the case of Greece, the move to decentralisation and school autonomy appears to be taking slow steps.

⁵³ N. Mons, X. Pons, *Les standards en éducation dans le monde francophone. Une analyse comparative*, Neuchâtel, IRDP, 2006.

⁵⁴ B. Jobert, *Le tournant néolibéral en Europe. Idées et recettes dans les pratiques gouvernementales*, Paris, L'Harmattan, 1994; D. Gravaris, N. Papadakis (edd.), *Εκπαίδευση και εκπαιδευτική πολιτική μεταξύ κράτους και αγοράς* [Education and educational policy between state and the market], Athens, Savvalas, 2006 (in Greek).

⁵⁵ J.P. Peuziat, G. Rey, *La politique régionale entre cohésion et compétitivité: des territoires en action*, «Etudes Européennes», 2005, Last modified: 2009, <http://www.etudes-europeennes.eu/images/stories/Archives/8-4_Politique_rgionale_J-P_Peuziat_G._Rey.pdf> (last access: December 14th, 2011).

L'Olimpo fanciullo. Tracce storiche di una pedagogia del mito tra educazione, narrazione e didattica

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Children's Olympus. Historical traces of a myth's pedagogy between education, tales and didactics

ABSTRACT: The origins of the children's mythological books in Italy date back to 1911, when Laura Orvieto wrote *Storie della storia del mondo* ('Stories about the history of the world'), the first mythological adaptation for young Italian readers. Nevertheless the pedagogical debate on relationship between myth and education started with Plato, but developed during the Lutheran reform in Germany, when the Protestant intellectual Melancton regarded Homer as being important for youth education. That debate continued in following centuries in Germany: Goethe, Herbart, Steiner and many others attached pedagogical importance to myth. In their opinion, a new kind of cultivated man could emerge from the ideas and fancies expressed in myths. Such considerations were especially appreciated in Italy when, in 1923, the scholastic reform was launched by the fascist regime. That reform emphasized – with much ambiguities – the humanistic erudition and the study of classical mythology, which was promoted starting from the primary school. Historical evolutions and pedagogical sides of this debate are highlighted, with a special attention to the Italian situation.

EET/TEE KEYWORDS: Mythology; History of Education; Children's and Youth Literature; Pedagogical Thinking; Germany; Italy; XVIII-XX Centuries.

1. *Il senso educativo del mito*

Vi sono settori dove la ricerca storico-pedagogica è costretta a procedere necessariamente attraverso una ricucitura di lacerti, di schegge e di indizi, per tentare di ricostruire una trama e un senso altrimenti sfuggenti. A questo

proposito, nelle pagine seguenti si tenterà di illustrare gli esiti di un'indagine volta a collocare nei suoi aspetti cronologici ed educativi accertati, quanto emerge dalle riflessioni pedagogiche intorno al tema del rapporto tra mito, educazione e infanzia, con particolare riguardo alla situazione italiana. Per fare questo sono state individuate e analizzate per via comparativa le diverse e spesso frammentarie testimonianze e considerazioni autorevolmente elaborate nel passato intorno a tale complesso tema: se è vero che il mito come genere narrativo e come paradigma intellettuale ha una forte rilevanza nella storia culturale del continente europeo, è, tuttavia, altrettanto vero che non sempre è apparsa chiara la rilevanza formativa e immaginativa che i racconti ancestrali esercitano sull'infanzia. Da questa particolare situazione è emerso nel corso del tempo un insieme di osservazioni e riflessioni pedagogiche sul mito, che mostrano una forte attenzione al tema. Del resto, nella complessa storia delle civiltà i miti hanno rivestito molte funzioni diverse, spesso fra loro interrelate. I miti infatti sono elementi essenziali nelle tradizioni religiose, sociali e culturali di tutte le comunità umane, comprese quelle definite dalla modernità, come hanno significativamente mostrato le note analisi di Barthes, Dorflès e – più di recente – di Galimberti¹.

La funzione del mito cui dedicheremo attenzione in queste righe è quella pedagogica, dal momento che i racconti ancestrali hanno da sempre affiancato le diverse pratiche educative rivolte alle giovani generazioni, a partire dalle società che un tempo si designavano come 'primitive', mentre ora, più correttamente, si indicano come 'tradizionali'. In effetti mito e formazione nei millenni hanno intrecciato solide relazioni, connettendosi, per esempio, in modo ineludibile coi riti d'iniziazione: queste cerimonie di passaggio, spesso cruento, sono sempre accompagnate da momenti narrativi di tipo mitologico che spiegano ed illustrano agli iniziandi non solo il senso dell'esperienza che stanno attraversando, ma pure le origini remote delle regole sociali della comunità, di cui stanno per divenire membri a tutti gli effetti. Si pensi, a questo proposito, a quanto Fraser rilevava agli inizi del XX secolo nella sua fondamentale opera *Il ramo d'oro*: lo studioso britannico, esperto in saperi colti e folclorici, notava infatti che in numerose società tradizionali dalla Nuova Guinea all'Africa e alle Americhe, i miti totemici (espressi in forma di racconto, drammatizzazione, eventi sonori e mascheramenti) venivano presentati e fatti rivivere ai giovani novizi per trasmettere a questi ultimi un sapere iniziatico che consentiva ad essi di affrontare consapevolmente i passaggi rituali verso l'età adulta². In tale prospettiva il mito è pertanto un sapere narrativo e simbolico in grado di attribuire un senso a un'esperienza di formazione fondamentale, per coloro i

¹ R. Barthes, *Mythologies*, Paris, Éditions du Seuil, 1957; trad. it. *Miti d'oggi*, Torino, Einaudi, 1974; G. Dorflès, *Nuovi miti, nuovi riti*, Torino, Einaudi, 1979; U. Galimberti, *I miti del nostro tempo*, Milano, Feltrinelli, 2009.

² J.G. Fraser, *The Golden Bough: A Study in Magic and Religion*, London, Macmillan, 1922; trad. it. *Il ramo d'oro*, Torino, Bollati Boringhieri, 1990, pp. 801-811.

quali si trovano nella delicata fase di transizione tra lo stato infantile e quello adulto.

D'altra parte, come ha osservato Cassirer nella sua dettagliata analisi filosofica del pensiero mitico, il mito è una forma simbolica che permette al soggetto di prendere le distanze dall'immediato e dal vissuto per elaborare proprio su quelle esperienze dirette una particolare modalità espressiva. Modalità espressiva che consente all'uomo di dare un significato e un valore specifici alle esperienze attraversate³. Un significato e un valore che – aggiungiamo noi – non possono non avere per il soggetto che li elabora anche un significato formativo-educativo. Il mito rappresenta quindi un momento narrativo capace di attribuire un significato a un'esperienza e in grado di aiutare il soggetto ad interpretare un evento, un dato, una regola comunitaria: i racconti ancestrali sono pertanto uno dei primi strumenti di educazione sociale e di autoformazione messi a disposizione delle giovani generazioni. Tentare quindi un'analisi delle ragioni pedagogiche del mito significa, per molti versi, porre attenzione ad una delle radici più profonde delle teorie e delle pratiche educative, anche di quelle contemporanee.

2. *Le origini dell'attenzione pedagogica verso il mito*

Nell'ambito della cultura occidentale, uno dei primi autori a cogliere il forte nesso tra educazione e mito è Platone, per il quale, del resto, l'elaborazione di originali racconti mitici rappresentava un'efficace modalità, per esprimere in forma narrativa scorrevole quelle verità sapienziali e rigorose, che, con altri codici, potevano risultare ostiche da comprendere: a questo proposito il pensatore greco aveva creato miti filosofici peculiari coi quali era possibile attingere a conoscenze autentiche, come nel noto caso del mito della caverna. Ma è nel dialogo *La Repubblica*⁴ che emerge in modo chiaro e forte l'intuizione di Platone circa il senso pedagogico del mito per le nuove generazioni: in questo scritto il filosofo notava come le prime forme di narrazione offerte ai bambini dalle nutrici fossero proprio i miti che, recepiti in così tenera età, divenivano nei fatti uno straordinario strumento educativo, perché influenzavano in modo potente le menti ricettive dei più giovani. Per questo il pensatore suggeriva, nella sua prospettiva utopica di rinnovamento politico, che fossero i sapienti reggitori dello Stato a elaborare nuovi miti adeguati alla nuova società platonica e rispondenti così ad un intenzionale progetto educativo voluto dai governanti.

³ E. Cassirer, *Philosophie der symbolischen Formen*, Berlin, 1923-1929; trad. it. *Filosofia delle forme simboliche. Il pensiero mitico*, Firenze, La Nuova Italia, 1964, pp. 43-44.

⁴ Platone, *La Repubblica*, a cura di G. Reale, *Platone. Tutti gli scritti*, Milano, Bompiani, 2001, II, 377 b-c.

Detto in altri termini il rinnovato complesso di miti della *polis* platonica era inteso come paradigma narrativo, per forgiare un nuovo immaginario per le nuove generazioni. Un immaginario rispondente pienamente alle virtù politiche e comunitarie dell'ipotetica società pensata dal filosofo greco.

Tuttavia è solo molti secoli dopo, nel XVI secolo, con la Riforma Protestante e con uno dei suoi più importanti rappresentanti in terra tedesca, Melantone, che il mito divenne oggetto di intensa attenzione pedagogica: del resto Melantone fu sia un attento rinnovatore religioso, che un appassionato riformatore di scuole e curricula educativi. A parere di Melantone⁵, infatti, i classici avevano la triplice funzione pedagogica di essere maestri di lingua, di sapere e di moralità. Era opinione del pensatore tedesco che Omero in questa prospettiva fosse un vero maestro di umanità dal momento che nella sua *Odissea* erano celebrati valori fondamentali quali la pietà, la devozione, la costanza e il coraggio⁶. Melantone, riformando le scuole tedesche nello spirito della sua fede e nel rispetto dei classici, offrì alle regioni protestanti un paradigma educativo, in cui si assicurava alla cultura umanistica e ai miti omerici una posizione di prestigio, da condividere con la lettura diretta delle Sacre Scritture. Il giudizio positivo espresso da Melantone sulla poesia e sui contenuti degli scritti omerici contribuì a fondare e consolidare nella cultura tedesca una forte attenzione pedagogica verso l'*Odissea* che ha, come vedremo, nei fatti attraversato i secoli.

Il recupero dei miti omerici in chiave pedagogica non rimase confinato nella sola Germania riformata, ma trovò spazio pure nella Francia largamente cattolica di fine Seicento, quando fu redatta la prima opera ispirata a materiali mitologici, pensata espressamente per un lettore fanciullo e scritta in una lingua volgare. Si tratta de *Les Aventures de Télémaque* redatta dall'ecclesiastico François de Salignac de la Mothe-Fénelon⁷ per il suo giovane allievo, il delfino di Francia, duca di Borgogna, di cui era precettore. L'opera di Fénelon si inseriva in un ambito di educazione morale e politica per un giovane destinato al potere. Il romanzo *Les Aventures de Télémaque* usava come contesto e cornice narrativa i viaggi del giovane Telemaco, accompagnato dal saggio Mentore, alla ricerca del padre Ulisse da troppo tempo assente dalla patria. Tuttavia, le peregrinazioni di Telemaco erano l'occasione per mostrare al giovane delfino diverse forme di governo e diversi paradigmi di moralità: i temi narrativi del mito, del viaggio, dell'imprevisto e dell'avventura erano intrecciati tra loro da Fénelon, per suscitare l'attenzione del suo nobile pupillo intorno ai nodi etico-politici di cui si vuole renderlo edotto. *Les Aventures de Télémaque* fu una delle prime

⁵ Per approfondimenti sulla figura del riformatore religioso tedesco si rimanda al libro di H. Scheible, *Melanchton. Eine Biographie*, München, Verlag C.H. Beck, 1997; trad. it. *Filippo Melantone*, Torino, Claudiana Editrice, 2001.

⁶ Cfr. quanto viene riportato e analizzato a questo proposito in G.M. Bertin, *La pedagogia umanistica europea nei secoli XV e XVI*, Milano, Marzorati, 1961, pp. 235-238.

⁷ F. Fénelon, *Les Aventures de Télémaque*, 1699; trad. it. *Le avventure di Telemaco*, Torino, Utet, 1959.

opere narrative per l'infanzia⁸ intenzionalmente create da uno scrittore per un giovane fruitore, anche se lo stile pedante e arcadico, come pure la trama a tratti prevedibile, non rendono il libro particolarmente appetibile. È importante notare però che per un libro dedicato a un lettore molto giovane si sia allora pensato a un contenuto di tipo mitologico, anziché a materiali narrativi provenienti dalle Sacre Scritture, dalle fiabe, dagli aneddoti storici o dalle leggende religiose e profane, come invece già accadeva largamente. Agli occhi dell'ecclesiastico e pedagogo francese il mito omerico – seppur reinterpretato – aveva una moralità e un'efficacia narrativa tale da poter essere proposto come opera edificante ed educativa per un bambino destinato a regnare. È quindi importante notare come in certi settori del pensiero educativo europeo tra Cinquecento e Seicento si fosse consolidata, tanto in campo protestante quanto in quello cattolico, l'idea che Omero e la sua *Odissea* rappresentassero un materiale pedagogicamente rilevante e didatticamente efficace⁹.

Questa riscoperta del mito come forma narrativa vicina all'infanzia in parte, del resto, è stata rilevata, sempre tra Seicento e Settecento, anche da Vico¹⁰: il pensatore napoletano teorizzò, infatti, lo sviluppo della civiltà come processo in cui all'epoca divina si sono succedute quella eroica e infine quella umana, così come all'infanzia dell'uomo seguono l'età giovanile e poi quella adulta. Per Vico i primi uomini, come pure i fanciulli, non essendo in grado di comprendere i fenomeni naturali e gli accadimenti in modo razionale, ebbero la necessità di fingersi i caratteri poetici fantastici, la cui sapienza si esprimeva nel mito. Il mito come spiegazione fantastica dovuta all'immaginazione e ai robusti sensi degli uomini delle società primitive si accordava così con l'infanzia, che è espressione delle prime età biologiche dell'umano. Questo parallelismo tra sviluppo della civiltà e crescita dell'uomo verrà rielaborato, come vedremo, pure in seguito, con importanti riflessi anche sulle speculazioni pedagogiche intorno al rapporto tra mito e infanzia.

Ma sarà il Settecento tedesco – e siamo ancora una volta, è bene notarlo, in Germania – a consolidare la presenza del mito nel pensiero educativo. Infatti, in quel periodo andò progressivamente a costituirsi tra gli intellettuali tedeschi un forte interesse verso la letteratura, il pensiero e l'arte della Grecia classica. Un interesse che ebbe un fortissimo impatto culturale ed educativo culminante nell'elaborazione della *Bildung* umanistico-romantica¹¹. *Bildung*, che possiamo

⁸ Il delfino, quando fu affidato alle cure del Vescovo di Cambrai, aveva circa sette anni.

⁹ A questo proposito, come ulteriore elemento di riflessione in merito, si rimanda ai ricordi di Montaigne intorno alla propria educazione ricevuta in età infantile. Un'educazione in cui, ricorda lo scrittore francese del XVI secolo, la lettura diretta dei classici mitologici aveva avuto un gran peso sin dalla sua fanciullezza. Cfr. M. de Montaigne, *Sull'educazione – Saggi scelti*, Firenze, Le Monnier, 1954, pp. 68-69.

¹⁰ G.B. Vico, *La Scienza Nuova*, Torino, Utet, 1976, pp. 381-387.

¹¹ Per una trattazione approfondita intorno a questo tema si veda M. Gennari, *Storia della Bildung. Formazione dell'uomo e storia della cultura in Germania e nella Mitteleuropa*, Brescia, La Scuola, 1995.

tradurre col termine di «formazione», è un concetto chiave in campo pedagogico e non solo: in realtà affrontare il tema della *Bildung* nella sua complessità è molto arduo, perché si tratta di un concetto nato con il sorgere dell'identità tedesca nella svolta del medioevo, arrivando a una sua ricca compiutezza in tempi a noi più vicini. La *Bildung* è un'idea fondamentale per riconnettere quei frammenti di 'pedagogia del mito' che si stanno qui raccogliendo. Nella seconda metà del Settecento i più importanti intellettuali tedeschi giunsero alla conclusione che gli antichi elleni avevano elaborato una cultura universale e originale, dove ragione e sentimento trovavano una sintesi armonica. Pertanto, in quest'ottica, il soggetto poteva creare il sapere nel momento in cui egli si faceva artefice di una formazione personale mediata dai valori perenni individuati dalla cultura greca antica. Il soggetto in formazione, dunque, era invitato a ripercorrere con viva cura gli esiti della civiltà ellenica, contemplandoli in modo incessante.

Del resto, in quei decenni Winckelmann andava riscoprendo l'arte antica greco-romana, Schelling vedeva nel mito il prototipo della creazione artistica¹², Goethe confessava apertamente il suo debito poetico verso Omero¹³, Herder riscopriva le mitologie 'altre' del nord (l'*Edda* e i canti di Ossian), riconoscendo però esplicitamente che la stagione culturale greca aveva rappresentato un momento unico di formazione umana, in quanto in quella civiltà si trovavano gli ideali a cui guardare¹⁴. Goethe e Schiller perfezionarono il concetto di *Bildung*, recuperando dai greci antichi sia la tensione verso la ricerca filosofica che la coscienza mitica¹⁵: per essi la formazione integrale dell'uomo si sosteneva sui valori eterni della classicità espressi dall'arte, dai miti e dal pensiero dell'Ellade. Una classicità che pareva trovare compimento nella mediazione, auspicata dai due autori, tra *Bildung* tedesca e *Paideia* greca. Nella prospettiva appena delineata, il mito antico assumeva così una dignità educativa nella formazione dell'individuo, accanto agli altri aspetti culturali – tutti tra loro interrelati – generati dalla classicità.

3. Herbart e la riscoperta di Omero come educatore

Questa valorizzazione del mito classico in chiave educativa conobbe, sempre in Germania, un'ulteriore stagione di approfondimento pedagogico

¹² W.J. Schelling, *Filosofia dell'arte*, in M.F. Sciacca (ed.), *Grande antologia filosofica*, Milano, Marzorati, 1971, Vol. XVIII, pp. 206-211.

¹³ J.W. Goethe, *Poesia e verità*, in Id., *Goethe. Opere*, Firenze, Sansoni, 1944, Vol. I, pp. 1097-1100.

¹⁴ Sul pensiero di Herder intorno al mito si veda L. Mittner, *Storia della letteratura tedesca. Dal pietismo al romanticismo*, Torino, Einaudi, 1964, pp. 307-321.

¹⁵ Gennari, *Storia della Bildung. Formazione dell'uomo e storia della cultura in Germania e nella Mitteleuropa*, cit. pp. 74-75.

nel primo Ottocento grazie alle osservazioni e alle riflessioni di Herbart. L'importanza educativa di Omero era stata rilevata dal pensatore a seguito di una sua esperienza come precettore di due bambini di otto e nove anni: il filosofo oldenburghese aveva infatti osservato come l'*Odissea* rappresentasse per i suoi pupilli una narrazione interessante, che consentiva loro di inoltrarsi utilmente nei primi studi filologici e nella conoscenza dell'antichità classica; e questo perché quel poema era capace di affascinare quei giovani lettori con una materia attraente, educandoli contestualmente alla moralità e alla grandezza virile¹⁶. Sull'importanza di Herbart come filosofo e pedagogista non è certo il caso qui di ritornare.

Il dato per noi significativo delle riflessioni del pensatore oldenburghese riguarda la rilevanza da lui attribuita proprio al valore educativo di Omero, recuperando una tradizione culturale che in Germania risale alle considerazioni di Melantone. Pertanto, l'*Odissea* era considerata da Herbart come la narrazione più adeguata per i fanciulli a partire dagli otto anni, in quanto il racconto presentava modelli etici e umani in cui il bambino poteva e voleva riconoscersi¹⁷. Le azioni narrate dal poema di Omero, per il pensatore tedesco, non ripetevano monotoni e noiosi precetti morali che ben presto venivano rigettati dai giovani lettori, come accadeva davanti a taluni libri per l'infanzia dell'epoca. Ribadire in modo ripetitivo il valore del bene comportava per Herbart il rischio che la semplice attrattiva del cambiamento rendesse il male attraente per il lettore. A parere del pensatore oldenburghese questo problema non esisteva nell'*Odissea* dove la varietà della materia, il delicato tatto morale, la dignità dei personaggi eroici cantati da Omero permettevano al bambino non solo di godere delle azioni narrate, ma pure di avere un riferimento 'virile' verso cui tendere. Va notato che Herbart ha ribadito in più momenti l'importanza educativa della narrazione omerica, ma riteneva, tuttavia, che lo studio del rimanente corpus mitologico classico fosse da riservare ai giovani e non ai fanciulli, in quanto questi ultimi non avrebbero tratto alcun giovamento dalla conoscenza delle complesse teogonie antiche e dall'approccio con racconti 'sconvenienti' (a tutti è ben nota la licenziosità di taluni miti)¹⁸. La notazione del pensatore tedesco è significativa, perché uno dei nodi critici ricorrenti sia nella narrativa mitologica per ragazzi, che nell'approccio didattico ai miti è sempre stato proprio quello della 'sbrigliatezza' sensuale di talune storie ancestrali¹⁹.

¹⁶ J.F. Herbart, *Allgemeine Pädagogik aus dem Zweck der Erziehung abgeleitet*, 1806; trad. it. *Pedagogia generale derivate dal fine dell'educazione*, Firenze, La Nuova Italia, 1997, pp. 20-21. Vedi anche J.F. Herbart, *Umriss Pädagogischer Vorlesungen*, Göttingen, Druck und Verlag der Dieterichschen Buchhandlung, 1841 (prima ed. 1835); trad. it. *Compendio delle lezioni di pedagogia*, Roma, Armando, 1971, pp. 229-231.

¹⁷ Herbart, *Pedagogia generale derivate dal fine dell'educazione*, cit., pp. 20-21.

¹⁸ Herbart, *Compendio delle lezioni di pedagogia*, cit. p. 205.

¹⁹ A questo proposito si veda W. Grandi, *La musa bambina. La letteratura mitologica italiana per ragazzi tra storia, narrazione e pedagogia*, Milano, Unicopli, 2011, pp. 83-95.

Al di là di ciò, per Herbart era comunque impossibile che un autore moderno potesse elaborare un libro per bambini adeguato alle reali capacità di comprensione dei fanciulli: l'infanzia non poteva giungere, a suo parere, al punto di evoluzione morale e culturale in cui si trovavano gli scrittori a lui contemporanei. Solo un poeta vissuto all'epoca della fanciullezza dell'umanità era capace, per Herbart, di parlare all'infanzia con storie da essa completamente comprensibili. Sentiamo qui echeggiare quanto Vico aveva a suo modo già enunciato circa il parallelismo tra storia dell'evoluzione culturale dell'umanità e storia dell'evoluzione fisico-intellettuale dell'individuo. Infatti, secondo la teoria di Herbart, il bambino nella sua crescita è destinato a ripercorrere le tappe graduali di sviluppo della civiltà. E pertanto, i miti omerici sono la forma narrativa più adeguata all'infanzia, perché utilizzano modalità di racconto, di espressione e di metafora che la fanciullezza riconosce come proprie: di fatto nel processo di formazione personale, l'individuo ricapitola nei tratti essenziali il cammino compiuto dall'umanità nel corso del proprio incivilimento²⁰. Alla luce della contemporanea critica pedagogica della letteratura per l'infanzia le teorie herbartiane in merito alle letture da proporre ai bambini sono datate. Tuttavia è con Herbart che il mito omerico diventa oggetto di una fondata riflessione pedagogica. Al pensatore oldenburghese dobbiamo cioè una sicura trattazione delle possibilità educative connesse al mito: pur inserendosi in una tradizione speculativa di lunga data, Herbart è il primo pensatore a fornire ai racconti omerici una cornice culturale interrelata puntualmente con una teoria pedagogica.

4. *Altre voci pedagogiche tedesche sul mito*

L'attenzione di Herbart per Omero ebbe un seguito anche tra i suoi allievi e seguaci: va ricordato, per esempio, che dobbiamo al tedesco Tuiskon Ziller (1817-1882) – discepolo di Herbart – la sistematizzazione, talora un po' 'libera', dell'intuizione herbartiana circa la teoria delle epoche culturali; teoria per la quale nel programma di studio del ragazzo è necessario riprendere le varie fasi attraverso cui è passato lo sviluppo culturale umano: pertanto si invitava a stimolare nel fanciullo dapprima la facoltà percettiva, poi quella immaginativa (tramite il mito e la poesia) e da ultimo la facoltà intellettuale, percorrendo uno schema storico-evoluzionista che ebbe popolarità nella seconda metà dell'Ottocento, anche a seguito del diffondersi delle teorie darwiniane, apparentemente basate su processi analoghi²¹. Anche lo studioso e pedagogista

²⁰ F. Blättner, *Geschichte der Pädagogik*, Heidelberg, Quelle & Meyer, 1960; trad. it. *Storia della Pedagogia*, Roma, Armando, 1972, pp. 309-310.

²¹ E. Gelpi, *Storia dell'educazione*, Milano, Vallardi, 1967, p. 347.

tedesco di area cattolica Otto Willmann (1839-1920), attento seguace delle dottrine herbartiane, si interessò agli intrecci tra cultura classica e formazione, scrivendo, tra le altre cose, un saggio sul rapporto tra Omero e l'educazione²²; saggio che ebbe la prefazione dello stesso Tuiskon Ziller.

Negli anni in cui Herbart svolgeva le riflessioni appena ricordate, sempre in Germania e sempre con una viva attenzione al mondo dell'educazione e delle scuole, operava pure lo scrittore e studioso di antichità Gustav Schwab (1792-1850) che produsse diverse opere di divulgazione mitologia classica e nordica per giovani lettori, tra cui una famosa raccolta di miti greci che è rimasta a lungo la prima guida²³ a questo mondo narrativo complesso per i ragazzi che si affacciavano agli studi umanistici nei paesi di lingua tedesca. La prima edizione di quest'opera risale al 1839 con continue riedizioni nei decenni successivi: ancora nel 2003 ne è stata pubblicata una delle più recenti versioni in lingua italiana²⁴. I libri di Schwab furono considerati nel nostro Paese opere narrative per ragazzi come le fiabe, tanto da essere citati nei manuali di preparazione magistrale di storia della letteratura per l'infanzia accanto agli altri 'classici' per bambini²⁵.

In questo panorama tutto tedesco una menzione particolare merita infine la figura di Rudolf Steiner (1861-1925), il cui pensiero antroposofico e pedagogico pone molta attenzione al mito e alle sue possibili verità arcane. Un pensiero che tuttora è alla base della metodologia educativa delle centinaia di scuole in tutto il mondo che seguono i suoi dettami pedagogici e che, pertanto, si definiscono 'steineriane'. Il pensatore nacque ai margini dell'allora Impero d'Austria, ma visse soprattutto a Vienna, a Berlino e nella Svizzera tedesca: Steiner si dedicò ad approfonditi studi sugli scritti di Goethe e sul pensiero esoterico-teosofico, cercando di trovare corrispondenze e contatti tra questi vasti materiali culturali. Arrivò così a maturare una personale posizione filosofica che rielaborava i contenuti assimilati da tali ricerche spirituali in una chiave personale: se è vero che da più parti le teorie pedagogiche e scientifiche di Steiner sono state oggetto di perplessità, se non addirittura di critica, è altrettanto vero però che il suo pensiero può vantare realizzazioni notevoli non solo nel campo dell'educazione, ma pure in quello dell'agricoltura biologica, della medicina olistica, dell'architettura organica²⁶. Steiner dedicò molti dei suoi scritti – spesso

²² O. Willman, *Die Odyssee im erziehenden Unterrichte*, Leipzig, Verlag für erziehenden Unterricht, 1868.

²³ G. Schwab, *Sagen des klassischen Altertums*, Stuttgart, [s.n.], 1838-1840.

²⁴ G. Schwab, *Le più belle leggende dell'antichità classica*, Roma, Newton Compton, 2003.

²⁵ Cfr. G. Fanciulli, *Scrittori e libri per l'infanzia*, Torino, SEI, 1952, pp. 24-25.

²⁶ Vedi a questo proposito C. Wilson, *Rudolf Steiner. The man and His Vision*, Wellingborough, Aquarian, 1985; trad. it. *Rudolf Steiner. La vita e la dottrina del fondatore dell'antroposofia*, Milano, TEA, 1995; vedi pure A. Gallerano, G. Burrini, *L'antroposofia. Il messaggio di Steiner*, Milano, Xenia Edizioni, 1996.

raccolti direttamente dalla sua viva voce durante le sue conferenze – all’analisi dei miti, non limitandosi solo ai racconti ancestrali occidentali, ma allargando la sua attenzione pure alle mitologie di altre tradizioni lontane.

Per Steiner attraverso il mito è possibile seguire l’evoluzione spirituale e culturale dell’umanità: il mito per lui ha un forte valore simbolico e sa far vibrare di forza spirituale i singoli individui e le diverse comunità umane, procurando così l’armonia tra mondo fisico e mondi superiori²⁷. Non è quindi incoerente che nella pedagogia di Steiner il mito in talune situazioni assuma un ruolo educativo forte. Per esempio, nella peculiare visione steineriana dello sviluppo dell’individuo vi è un periodo di particolare ‘crisi’ che coincide con il raggiungimento dei nove anni d’età quando, per il fondatore dell’Antroposofia, il bambino diventa irrequieto, si ritira un po’ dai contatti con gli adulti, chiede ai suoi educatori di diventare degni del rispetto che essi vogliono dall’infanzia²⁸. Il bambino non può essere lasciato solo in questa delicata fase di passaggio, in cui egli intraprende una nuova conquista del mondo. Perciò nella didattica steineriana questa tappa evolutiva viene affrontata, facendo ricorso anche al racconto di saghe mitologiche nordiche, che contengono immagini forti ritenute idonee a stimolare il nuovo incontro tra la realtà esterna e i fanciulli²⁹.

5. *Dalle terre tedesche all’Italia: Gino Capponi e il recupero di Omero*

Ma ora facciamo un passo indietro e torniamo di nuovo ai primi decenni del XIX secolo. Il clima di grande attenzione al valore educativo dei miti omerici nei paesi di lingua tedesca del primo Ottocento è confermato anche dall’esperienza scolastica messa in essere a Hofwyl, località nel cantone svizzero-tedesco di Berna, dall’aristocratico elvetico Philipp Emanuel von Fellenberg (1771-1844)³⁰ pressoché coetaneo di Herbart. L’esperienza didattica di Hofwyl si sviluppava su più livelli: vi erano infatti una scuola per i poveri, una scuola agraria, un asilo, alcuni corsi di preparazione magistrale e un ginnasio. Von Fellenberg riteneva fondamentali i contenuti storici e filologici. L’esperimento scolastico di

²⁷ R. Steiner, *Leggende e misteri antichi (nella loro occulta verità)*, Milano, Editrice Antroposofica, 2008, pp. 28-36. Il volume raccoglie i discorsi di alcune conferenze che l’autore tenne tra il 1904 e il 1907.

²⁸ R. Steiner, *Vita spirituale del presente ed educazione*, Milano, Editrice Antroposofica, 2008, pp. 135-137. Il volume raccoglie i testi di alcune conferenze che l’autore tenne nel 1923.

²⁹ T. Homberger, *Esperienze di un insegnante di classe: i primi otto anni di scuola*, «Arte dell’educazione. Rivista semestrale di pedagogia dell’Associazione degli Insegnanti delle Scuole Rudolf Steiner di lingua italiana», vol. 1, n. 2, secondo semestre 1995, pp. 49-52.

³⁰ Per una sintesi efficace dell’esperienza educativa del von Fellenberg vedi *Filosofia e pedagogia. Profilo storico e analisi delle istituzioni educative*, Torino, SEI, 1985, Vol. III, pp. 107-108.

Hofwyl attirò l'attenzione di numerose personalità dell'epoca interessate a un rinnovamento pedagogico.

Nel 1820 anche Gino Capponi visitò queste scuole, rimanendo particolarmente colpito dagli insegnamenti e dalle pratiche didattiche in uso nel *gymnasium*. L'intellettuale fiorentino rilevava che in questa particolare sezione delle scuole di von Fellenberg veniva dato grande spazio allo studio degli scrittori greci più antichi, capaci – a detta del Capponi – di «insinuare nei fanciulli in tutta la purità loro quei sentimenti, dei quali è cosa essenziale che siano nutriti i primi anni della loro infanzia»³¹. Tra questi scrittori antichi studiati nella scuola svizzera primeggiava Omero che, notava il Capponi, era l'autore preferito dai fanciulli dai dieci ai dodici anni i quali, frequentando quell'istituto, gareggiavano tra loro a recitare i versi omerici, inventavano giochi ispirati alle storie del poeta greco e, infine, perdevano il sonno per leggere di nascosto quelle avventure poetiche. Capponi riteneva che questa attenzione didattica verso Omero fosse estremamente positiva in quanto gli alunni si assuefacevano così a «pensieri maschi e vigorosi»³². Nelle parole del pensatore fiorentino ancora una volta si avverte l'eco delle riflessioni su Omero svolte da Melantone e da Herbart. Forse per la prima volta un intellettuale italiano interessato ai temi pedagogici raccoglieva queste sollecitazioni sul mito di derivazione tedesca. Del resto è lo stesso Capponi a riconoscere che l'oblio educativo, cui Omero pareva destinato a essere condannato nel nostro Paese, era motivo di «gran vergogna per noi italiani»: l'autore fiorentino riteneva tale oblio causato dalla trascuratezza e dal desiderio di seguire mode diverse, sicché nella penisola ci si era dimenticati di essere i primi eredi di quel retaggio classico, abbandonato agli «ultramontani»³³. Infine fu sempre Capponi che riconobbe al mito e al meraviglioso un ruolo fondamentale nei processi educativi in quanto entrambi consentono all'infanzia di elevarsi dalle contingenze più comuni per tendere verso mete più alte: l'autore denunciò così il fatto che le tendenze educative a lui contemporanee avevano voluto dare rilevanza alla sola ragione, con la conseguenza di aver escluso il mito che, per Capponi, era «educatore e sovrano» dell'uomo e dei popoli³⁴.

6. *La ritrovata e ambigua dignità pedagogica del mito in Italia dalla riforma Gentile attraverso il regime fascista*

Le tracce di mito per l'infanzia che si possono individuare nel nostro Paese durante l'Ottocento sono poche ed esclusivamente limitate ai libri di testo delle

³¹ G. Capponi, *Gli istituti d'Hofwyl e segnatamente il gymnasium* (1822), in Id., *Scritti pedagogici*, Brescia, La Scuola, 1968, pp. 31.

³² *Ibid.*, pp. 32-33.

³³ *Ibid.*, p. 33.

³⁴ G. Capponi, *Sull'educazione. Frammento* (1841), in Id., *Scritti pedagogici*, cit., p. 132.

scuole elementari. Fino al 1911 con la pubblicazione del libro di mitologia per bambini *Storie della storia del mondo* di Laura Cantoni Orvieto³⁵ – primo libro italiano narrativo del genere pensato espressamente per l'infanzia, su cui si tornerà tra breve – non è esistita una vera letteratura mitologica per ragazzi come invece già era edita da decenni nei paesi di lingua anglosassone. Gli unici frammenti di miti per gli allora lettori italiani giovanissimi si trovavano, appunto, solo nei volumetti e sussidiari scolastici: tali brani sostanzialmente si limitavano a riassumere in breve alcuni racconti ancestrali romani (come le vicende di Romolo e Remo) o talune narrazioni di tipo moralistico come l'episodio di Ercole al bivio tra Vizio e Virtù³⁶.

Ma il mito fu portato rapidamente all'attenzione dell'infanzia con la riforma scolastica Gentile del 1923, grazie alla quale la cultura umanistica divenne il cardine del sistema d'istruzione nel nostro Paese sin dai suoi primi gradi. E fu proprio l'allora direttore generale dell'istruzione elementare, il pedagogista siciliano Giuseppe Lombardo Radice, a spiegare pochi mesi dopo l'avvio della riforma, a un uditorio composto anche di maestri elementari, l'importanza di proporre Omero agli scolari dell'istruzione primaria. Lombardo Radice – che del resto aveva largamente contribuito a stendere i programmi riformati delle scuole elementari – chiarì le ragioni di tale indicazione appoggiandosi, non a caso, ad Herbart: egli spiegò al suo pubblico che l'idea di proporre Omero ai bambini era valida proprio perché fondata sulla giusta osservazione del pensatore tedesco, per il quale i fanciulli 'moderni' potevano comprendere e apprezzare interamente il poeta che fu cantore della fanciullezza dell'umanità. Inoltre, aggiungeva Lombardo Radice, l'aver letto in adattamento e traduzione le opere di Omero già alle scuole elementari, avrebbe aiutato quegli alunni a gustare meglio i versi del poeta greco in lingua originale una volta giunti al liceo³⁷.

Quest'ultima piccola considerazione del pedagogista siciliano in realtà svela molto del progetto educativo gentiliano volto a connettere fortemente in senso propedeutico e gerarchico i diversi gradi scolastici; pertanto in un'ottica di prevalenza della cultura classico-umanistica nella scuola italiana, anche la mitologia aveva una sua ragione d'essere come presenza curricolare sin dalle scuole elementari. Non è certo un caso se proprio a partire dagli anni '20 e '30 del Novecento, in corrispondenza con l'avvio e i successivi aggiustamenti della riforma Gentile, l'editoria per ragazzi in Italia iniziò ad offrire grande spazio

³⁵ L. Cantoni Orvieto, *Storie della storia del mondo. Greche e barbare*, Firenze, Bemporad, 1911.

³⁶ Vedi, per esempio, per il primo caso G.A. Silvestri, *Quarto anno di scuola del giovinetto italiano. Letture per la classe 4^a elementare*, Torino, Paravia, 1897, pp. 93-95, mentre per il secondo caso G. Mestica (ed.), *Favole, novelle e lettere di Gasparo Gozzi per uso delle scuole elementari e mezzane*, Firenze, G. Barbera Editore, 1892, pp. 152-155.

³⁷ G. Lombardo Radice, *Accanto ai maestri. Nuovi saggi di propaganda pedagogica*, Torino, Paravia, 1925, p. 233.

al mito in collane specifiche o in collane più generaliste per giovani lettori. Si pensi alla collana specifica sui racconti ancestrali “Miti, Storie, Leggende” edita dalla casa editrice Paravia di Torino a partire dal 1926, curata personalmente sino alla sua morte nel 1958 da Luisa Banal³⁸; o si pensi ancora alla collana più generalista “La Scala d’Oro” edita dalla torinese Utet a partire dal 1932 e curata da Vincenzo Errante e Fernando Palazzi³⁹, che accoglieva tra le riduzioni di grandi romanzi e le opere divulgative anche molti adattamenti mitologici. Si noti inoltre che sempre in quel periodo sono stati pubblicati oltre agli altri libri di mitologia per bambini di Laura Orvieto⁴⁰ – come *Il natale di Roma* del 1927 e *Storie di bambini molto antichi* del 1937 – anche gli adattamenti di Gherardo Ugolini⁴¹ – scrittore per ragazzi, insegnante elementare e pubblicitista di pregio – che fece uscire i suoi numerosi volumi mitologici per giovani lettori a partire dal 1925 per la casa editrice La Scuola di Brescia. Si è trattato dunque di un’epoca straordinaria per la letteratura mitologica italiana per ragazzi, che praticamente sorse negli anni ’20 e si consolidò a partire da allora. Un periodo intenso che non si è più ripetuto in termini qualitativamente e quantitativamente così importanti. Un periodo che ha però posto le basi editoriali per tutta la pubblicistica mitologica per ragazzi successiva e che segnala in modo forte lo stretto legame tra editoria mitologica e pratica didattica⁴².

La riforma Gentile e il rinnovato interesse didattico verso la classicità e il mito si situarono nel contesto socio-politico determinato dal regime fascista, che ebbe nei confronti dei racconti ancestrali latini – come pure nei riguardi della storia italica – un forte interesse di tipo propagandistico, retorico e ideologico. Nel sistema politico mussoliniano i riferimenti mitologici erano costanti e continui: «dai figli della lupa» ai «colli fatali» la retorica fascista era colma di rimandi espliciti ai racconti ancestrali della romanità, tentando di saldare i miti della fondazione delle città eterna agli scopi del regime; la retorica fascista passava così in modo disinvolto dalle narrazioni avvolte dalla

³⁸ Sulla figura di Luisa Banal e della sua collana mitologica cfr. A. Faeti, *Guardare le figure*, Torino, Einaudi, 1972, pp. 286-288. Cfr. anche Grandi, *La musa bambina. La letteratura mitologica italiana per ragazzi tra storia, narrazione e pedagogia*, cit., pp. 62 e 116-119.

³⁹ Per una visione d’insieme sulla collana “La Scala d’Oro”, i suoi curatori e i suoi autori cfr. P. Pallottino, *Luci e ombre della Scala d’Oro*, in *Conformismo e contestazione nel libro per ragazzi. Storie e Sperimentazione*, Bologna, Cappelli, 1979, pp. 63-90.

⁴⁰ Sulla figura di Laura Cantoni Orvieto cfr. C. Poesio, *Laura Orvieto*, Firenze, Le Monnier, 1971, e C. Del Vivo, *Introduzione*, in L. Orvieto, *Viaggio meraviglioso di Gianni nel paese delle parole*, Firenze, Leo S. Olschki-Fondazione Carlo Marchi, 2007, pp. IX-XXI.

⁴¹ Su Gherardo Ugolini, la sua vita e i suoi libri per ragazzi vedi S. Fava, *Percorsi critici di letteratura per l’infanzia tra le due guerre*, Milano, Vita e Pensiero, 2004, pp. 211-215; vedi anche A. Fappani, *Enciclopedia Bresciana*, Brescia, Editore Opere San Francesco di Sales-La voce del popolo, 2005, Vol. XX; infine Grandi, *La musa bambina. La letteratura mitologica italiana per ragazzi tra storia, narrazione e pedagogia*, cit., pp. 105-108.

⁴² Gli esempi recenti e passati in merito sono numerosi, basta aprire una qualsiasi rivista professionale per docenti di scuola primaria, per scoprire diverse proposte di uso del mito nelle pratiche didattiche (di storia, geografia, lingua), e questo a partire dagli anni ’20 del secolo scorso.

leggenda di Romolo, di Remo e dei sette re, ai fatti storici accertati di Cesare, di Augusto e delle conquiste imperiali, piegando così mito e storia ad assumere una stessa posizione, dove essi si fondevano e si confondevano, per sostenere in modo capzioso, fumoso, ma emotivamente coinvolgente i destini imperiali d'Italia. Un esempio di questo uso strumentale del mito in sede educativa è rappresentato da un discorso tenuto da Mussolini all'università di Perugia nel 1926, dove il 'duce' argomentava l'ineludibilità del fato imperiale dell'Italia proprio a partire da racconti mitologici: la cosa estremamente significativa per noi è che questa allocuzione mussoliniana era spesso antologizzata nei libri di testo⁴³ delle scuole elementari e di quelle di grado superiore, sancendo così nei fatti una visibilità didattica dell'uso propagandistico del mito. In tale discorso Mussolini affermava che «la storia o la leggenda» davano notizia di alleanze e imprese dei primi re romani, per potenziare la presenza navale dei quiriti nel Mediterraneo, secondo un'intenzione che fu poi continuata dal popolo di Roma anche in tempi storici successivi: pertanto, secondo il capo del fascismo, la «tetragona volontà», che gli antichi romani avevano mostrato sin dai tempi mitici, doveva valere anche per il perseguimento di supremazia dei mari intrapresa di recente dal regime. Ovvero si intendeva ricollegare le ragioni delle scelte mussoliniane al solco ideale di supremazia militare perseguita dall'Italia sin dalle sue ancestrali radici mitiche. Ovviamente si tratta di un discorso di nessuna consistenza storica e razionale, ma capace di incantare l'uditorio con orizzonti immaginari di forte presa emotiva. Un discorso che, una volta riportato sui libri di testo, intendeva fornire agli alunni delle elementari (e oltre) una particolare visione ideologica delle scelte politiche, le quali così parevano soffuse da un'aura di 'fato' e di destino – quasi metafisico, perché praticamente ancestrale e archetipico – che sottraeva gli ordini del regime da qualsiasi vaglio critico di natura razionale e contingente.

Tale approccio al mito è riconfermato in modo molto più esplicito dal ministro dell'educazione nazionale Bottai nel 1941⁴⁴ quando, in una particolareggiata circolare sui libri di testo e le biblioteche scolastiche, il gerarca tra le molte cose dedicò alcune riflessioni alla letteratura mitologica per bambini e ragazzi: il ministro difendeva l'uso degli adattamenti dei racconti ancestrali per i giovani lettori, perché questi ultimi si potevano così avvicinare ad un patrimonio culturale che era indispensabile per gli «eredi della civiltà greco-romana» che ancora vivevano in «un'aura di classicismo». Bottai aggiungeva inoltre che il mito viveva di fantasia e pertanto non bisognava togliergli quel senso di misterioso e di arcano da cui è costituito, pena la sua distruzione. Nel mito,

⁴³ A questo proposito il brano in questione è riportato, per esempio, in U. Ghiron, *Palpiti nuovi. Classe IV*, Palermo-Roma, Sandron Editore, 1927, s.i.p., ma pure in G. Leonardi, *Lavoro italico. Letture per le scuole secondarie di avviamento al lavoro*, Bologna, Sandron Editore, 1931, Vol. II, pp. 195-196.

⁴⁴ *Circolare ministeriale 6 gennaio 1941 – XIX, n. 31005*, in A. Ascenzi, R. Sani (edd.), *Il libro per la scuola nel ventennio fascista*, Milano, Vita e Pensiero, 2005, pp. 236-278.

proseguiva il gerarca, vi era una moralità universale che i ragazzi dovevano avvertire, anche se non riuscivano a spiegarsela. Nel mito, come nella fiaba, per Bottai c'era un senso di misteriosa verità che andava preservato e, in definitiva, offerto intatto agli scolari. Il mito, dunque, nella pratica educativa fascista era un contenuto indispensabile, in quanto radice identitaria e fonte di verità misteriose: due qualità molto utili per gli scopi della retorica e della pedagogia di regime.

Va notato infine che, con la seconda guerra mondiale, si pubblicarono diversi adattamenti mitologici per ragazzi dedicati alle saghe delle potenze amiche: per esempio, nel 1941 – proprio in coincidenza con l'entrata in guerra della Finlandia a fianco dei Paesi dell'Asse – fu pubblicato il primo adattamento per ragazzi dell'antico poema mitologico finnico *Kalevala*⁴⁵; tale poema, nonostante i suoi forti colori fiabeschi e l'attenzione che aveva suscitato sin dalla sua prima traduzione italiana nei primi anni del Novecento, non aveva sino ad allora interessato l'editoria per ragazzi. Sempre in quel periodo si ripubblicarono per la collana torinese di Luisa Banal, in piena guerra, *Nei campi elisi del Giappone. Miti, riti e leggende*⁴⁶ (1943, già uscito nel 1929), *La leggenda dei Nibelungi*⁴⁷ (1944, edito la prima volta nel 1931) e *La leggenda di Gudruna*⁴⁸ (1944, una saga germanica minore uscita già nel 1933). Va detto che con onestà gli autori di tutti questi libri si astennero sempre nei loro scritti da qualsiasi manifestazione di adesione al regime – anzi, tali volumetti sono largamente godibili pure ora e, del resto, l'adattamento citato del *Kalevala* è ancora oggi disponibile sul mercato. Tuttavia non può non colpire che, in piena guerra tra bombardamenti e razionamenti, veniva posta una certa attenzione editoriale proprio a questi particolari prodotti narrativi.

7. L'abbandono della retorica e il recupero del mito come fatto culturale dal secondo dopoguerra italiano

Nel 1945 su pressione degli Alleati e su indicazione del pedagogista statunitense Washburne (la cui formazione era riconducibile alle posizioni di Dewey) furono emanati dei nuovi programmi per la scuola elementare dove, per la classe terza, erano riportati espliciti riferimenti alla mitologia in stretto rapporto con gli apprendimenti di storia antica⁴⁹. Tali programmi a questo proposito dichiaravano:

⁴⁵ E. Primicerio, *Finlandia terra d'eroi: racconti del Kalevala*, Firenze, Marzocco, 1941.

⁴⁶ G. Rovida, *Nei campi elisi del Giappone: miti, riti e leggende*, Torino, Paravia, 1929.

⁴⁷ R. Usiglio, *La leggenda dei Nibelungi*, Torino, Paravia, 1931.

⁴⁸ M. Savi Lopez, *La leggenda di Gudruna*, Torino, Paravia, 1933.

⁴⁹ *Programmi di studio per le scuole elementari – D.M. 9 febbraio 1945; D. Lgt. 24 maggio 1945, n. 549*, riportato in F.V. Lombardi (ed.), *I programmi per la scuola elementare dal 1860 al*

gli alunni saranno intrattenuti a osservare e confrontare forme vecchie e nuove di abitazione, di utensili, strumenti di lavoro, mezzi di trasporto, indumenti, ecc. e gioiranno della narrazione viva e spigliata, quasi fiabesca, di visioni, miti, leggende dei popoli della più lontana antichità, dell'Egitto, di Grecia, di Roma»⁵⁰.

Le indicazioni ministeriali eliminavano nei fatti ogni precedente eccesso retorico e nazionalista: in primo luogo perché aprivano lo studio anche ai miti di altri popoli antichi oltre i romani; in secondo luogo perché ponevano la mitologia accanto a tutti gli altri dati ideali e materiali che definiscono le civiltà come concrete culture storiche. Parallelamente anche l'editoria per ragazzi e per la scuola si adattò al nuovo clima didattico: se da un lato talune collane già presenti nei decenni precedenti – come “Miti, Storie, Leggende” di Luisa Banal – continuarono a ripubblicare con accortezza taluni volumi del passato accanto a novità inedite, molti scrittori come Teodosio Capalozza – autore di volumetti per ragazzi piuttosto apprezzati nei decenni precedenti – colsero l'occasione per provarsi su un nuovo terreno narrativo e divulgativo. Per restare a Capalozza, nel 1948 pubblicò, infatti, una serie di quattro volumetti mitologici che riprendevano il dettato ministeriale, proponendo in ordine i miti egizi, i miti greci, una sintesi dell'*Odissea* e una sintesi dell'*Eneide*⁵¹. I libri di testo, poi, offrivano numerosi brani mitologici presi dai volumi dei principali autori di adattamenti dell'epoca: se, ad esempio, si prende il testo per le scuole elementari *Nel giardino fiorito. Letture per la terza classe*⁵², si nota che su 118 proposte di lettura – tra prose, poesie, brevi racconti ameni – almeno dodici – e tra i più ‘corposi’ – erano brani di natura mitologica tratti dai volumi di autori quali Mary Tibaldi Chiesa e Laura Orvieto. Praticamente il dieci per cento dei testi erano racconti ancestrali, nei quali i contenuti narrativi e i riferimenti ai quadri storici di civiltà prevalevano nettamente sui rimandi di natura retorico-nazionalista. Cosa che, per converso, non si riscontra, con un'analisi di tipo comparativo, in analoghi prodotti scolastici pubblicati durante il regime fascista, dove invece i riferimenti mitologici avevano una netta natura ideologica.

Il forte legame che nella scuola elementare (e non solo) a partire dal 1945 si è creato tra il mito e lo studio dei quadri storici di civiltà non si è mai più sciolto ed è rimasto nei fatti uno degli elementi costanti nelle pratiche didattiche: anche se i programmi scolastici successivi non hanno più avuto espliciti richiami al mito, sia l'editoria scolastica che la prassi quotidiana d'aula (come mostrano le proposte didattiche mensilmente edite sulle riviste per docenti) hanno sempre mantenuto questo intenso legame tra racconti ancestrali e approfondimenti storici e narrativi. Anzi, il mito ha progressivamente allargato il proprio campo

1955, Brescia, La Scuola, 1975, pp. 477-518.

⁵⁰ *Ibid.*, pp. 500-501.

⁵¹ T. Capalozza, *I quattro libri favolosi*, Milano, Tipografia Raimondi, 1948.

⁵² P. Gigli P., G. Martelli, *Nel giardino fiorito. Letture per la terza classe*, Milano, La Fiamma, 1949.

d'azione didattica dal momento che oggi è spesso utilizzato in situazioni molto varie, non ultime quelle relative alle pratiche interculturali, dove i miti di popoli e genti migranti diventano sovente materiale per favorire l'incontro e la reciproca conoscenza.

8. *Nuove voci pedagogiche italiane sul mito*

Anche la riflessione pedagogica italiana sul mito ha avuto dal secondo dopoguerra una rinascita: diverse e importanti voci pedagogiche si sono esercitate su questo tema, mostrando una profondità e una rilevanza d'analisi che è doveroso affrontare, anche se brevemente.

Una delle riflessioni pedagogiche sul mito più significative è quella elaborata da Giovanni Maria Bertin. Una riflessione sviluppata alla luce della tragica esperienza dell'ultimo conflitto mondiale, quando i miti nazifascisti e l'ideologia degli interessi di classe giunsero a un confronto sanguinoso. Bertin nel suo saggio *Crisi educativa e coscienza pedagogica* ha denunciato la natura potenzialmente irrazionale e barbarica – quindi pericolosa – dei miti ai quali, del resto, si contrappongono in un triste parallelismo le ideologie, spesso unilaterali e intolleranti. Al mito e all'ideologia Bertin oppone l'idea di utopia, ovvero la richiesta inesausta e *in itinere* di «un mondo migliore: di un mondo cioè cui sia dato al maggior numero di uomini [...] il massimo della vitalità individuale e collettiva»⁵³. La profetica e precisa disanima di Bertin offre gli strumenti per evidenziare gli aspetti più irrazionali e mortiferi del mito, evidenziando, a chiunque desideri approcciarsi pedagogicamente a quelle narrazioni, i pericoli insiti nell'uso retorico e propagandistico dei racconti ancestrali.

Anche nel campo degli studi pedagogici sulla letteratura per l'infanzia il mito inteso sia come forma culturale, che come genere narrativo è stato al centro di rilevanti riflessioni. Si pensi ad Antonio Faeti che ha sviluppato un originale approccio ermeneutico alle avventure di Pinocchio proprio a partire dalle considerazioni sul mito elaborate da alcuni studiosi di culture tradizionali come Mircea Eliade ed Elémire Zolla: seguendo tali tracce Faeti ha mostrato l'appartenenza del burattino di Collodi all'universo del mito, in quanto Pinocchio ripercorre nelle sue vicende i gradi più significativi dei riti d'iniziazione e dell'epos quali la nascita virginale, l'affidamento a un padre putativo, l'attraversamento della morte e della rinascita, l'incontro coi mostri marini. Faeti ricorda pure come in molte tradizioni i modelli narrativi esistenziali di riferimento per una comunità vengano esposti in forme domestiche e puerili: cosa che accade puntualmente pure con le storie di Pinocchio che parlano di

⁵³ G.M. Bertin, *Crisi educativa e coscienza pedagogica*, Roma, Armando, 1971, pp. 31-33.

verità perenni, ricorrendo a umili vicende⁵⁴. Con Faeti il mito diventa una categoria interpretativa capace di svelare all'analisi pedagogica gli aspetti a un tempo sapienziali ed educativi dei classici della letteratura per ragazzi. Inoltre, nell'ambito di un'aggiornata ricerca pedagogica del rapporto tra infanzia e fiaba, gli studi italiani contemporanei hanno sempre posto il mito come uno degli elementi simbolici e culturali fondanti la dimensione del fiabesco e, in generale, della narrazione.

Gianna Marrone individua, per esempio, nella mitologia e nella fiaba una profonda forza vitale attraverso cui gli individui nel corso della loro esistenza vengono in possesso degli strumenti simbolici – seppur non ‘giustificati’ dalla razionalità – con cui affrontare i grandi problemi della vita connessi con l'origine e la fine: si tratta cioè di contenuti narrativi che consentono all'uomo – e ancor più al bambino – di cercare risposte ai misteri della propria esistenza e di controllare le profonde angosce legate ai sentimenti di paura⁵⁵. Franco Cambi, poi, ha evidenziato le connessioni tra fiaba e mito dal momento che entrambe le forme narrative riescono ad esprimere quel bisogno di ‘arte del raccontare’ presente sin dalle comunità umane più arcaiche⁵⁶. Luciana Bellatalla ha, infine, ricostruito i rapporti tra il mito tradizionale e la figura di Peter Pan: per l'autrice il mito è uno strumento di educazione, perché tramanda i fondamenti paradigmatici di una cultura e spinge a guardare oltre le apparenze. Luciana Bellatalla ritiene, quindi, che Peter Pan sia un vero mito nuovo e autentico, perché il racconto delle avventure dell'eroe di Barrie è una narrazione esemplare che allude a verità ‘altre’ rispetto a quelle apparenti⁵⁷.

Nell'ambito degli studi di storia dell'infanzia va evidenziato il contributo di Egle Becchi all'approfondimento del legame tra mito e prime età della vita: la studiosa ha infatti analizzato alcune figure mitiche di fanciulli come Ermes e Pan bambini che hanno la capacità di rappresentare, in modo efficace, l'immagine del *puer-senex*, ossia del fanciullo divino abile allo stesso tempo sia delle bravate giocose dell'infanzia, che della saggezza dei vegliardi⁵⁸. Anche nell'ambito della pedagogia generale contemporanea sono emerse alcune riflessioni particolarmente significative intorno al tema della relazione tra mito ed educazione. Una delle più originali è quella che Vanna Iori ha condotto a partire da una sua documentata ricerca sulle connessioni tra educazione e magia. Poiché gli studi antropologici hanno chiarito la genesi comune del mito

⁵⁴ A. Faeti, *Le figure del mito. Segreti, misteri, visioni, ombre e luci nella letteratura per l'infanzia*, Cesena, Il Ponte Vecchio, 2001, pp. 11-15.

⁵⁵ G. Marrone, *Fiaba e fumetto due 'media' per il bambino*, Roma, Edizioni Seam, 1993, p. 15.

⁵⁶ F. Cambi, *Società arcaica e società ideale nella fiaba*, in F. Cambi, S. Landi, G. Rossi (edd.), *L'immagine della società nella fiaba*, Roma, Armando, 2008, pp. 17-25.

⁵⁷ L. Bellatalla, *Il mito di Peter Pan tra narritività e educazione*, in A. Avanzini, L. Bellatalla, *Peter Pan. Il racconto, il mito, il senso educativo*, Milano, Franco Angeli, 2009, pp. 83-85 e 98-102.

⁵⁸ E. Becchi, *I bambini nella storia*, Roma-Bari, Laterza, 1994, pp. 40-48 e 393-396.

e della magia come modalità per affrontare i grandi temi della vita, Vanna Iori afferma che le implicazioni pedagogiche di un'indagine sul mito sono suggerite dal fatto che la magia è spesso la traduzione rituale degli insegnamenti etici e culturali che una società esprime nei suoi miti (i quali, sia detto per inciso, Eliade considera «summa pedagogica»). Per l'autrice dunque avviare un processo di analisi pedagogica sui rituali mitico-magici che ci circondano significa sottrarre l'esperienza educativa a schemi troppo angusti: in questo senso la stessa esperienza educativa può essere ricondotta verso una dinamica formazione umana orientata contro qualsiasi dogmatismo chiuso o razionalismo antropocentrico⁵⁹.

Maria Teresa Moscato ha, invece, indagato i rapporti che i miti e le metafore intrattengono con il processo educativo. La studiosa ha infatti ripercorso i miti della classicità greca, reinterpretrandone i contenuti e i rimandi in chiave pedagogica, anche alla luce delle teorie junghiane sugli archetipi: questi ultimi sono inafferrabili se non quando si materializzano nelle figure archetipiche presenti nelle fiabe, nell'arte, nei sogni e, appunto, nei miti. Per Maria Teresa Moscato alcune di queste figure archetipiche appartengono al processo educativo (come le diadi genitore/figlio e maestro/discepolo). L'analisi di tali particolari figure archetipiche del mito offre molte informazioni sul costituirsi dell'oggetto 'educazione' nella coscienza⁶⁰.

Alla luce di quanto è emerso in questo breve e parziale percorso tra i legami che uniscono il mito alle realtà dell'infanzia e dell'educazione, possiamo concludere che la presenza dei racconti ancestrali nelle riflessioni pedagogiche e nelle pratiche didattiche ha una storia lunga, la quale, tuttavia, per il nostro Paese è, tutto sommato, recente. Per quanto il mito sia uno dei fondamenti tradizionali della nostra cultura, esso solo a partire dal Novecento è divenuto patrimonio diffuso anche per l'infanzia. E questo evento ha due radici: la prima risale al mondo germanico dove i rinnovamenti culturali dovuti alla controriforma e alla *Bildung* avevano posto attenzione al mondo classico e al suo retaggio omerico; la seconda è rintracciabile nel mondo anglosassone in cui, a partire dall'Ottocento, diversi autori importanti avevano redatto interessanti adattamenti per bambini di storie mitologiche. All'inizio del Novecento queste istanze si radicano fortemente anche in Italia dando il via, da un lato, a pratiche scolastiche più attente al mito sin dai suoi gradi elementari, da un altro lato, a una produzione narrativa di stampo mitologico pure per i lettori più giovani. E così attraverso la storia della presenza del mito in educazione è possibile ricostruire alcune parti non secondarie dello sviluppo educativo e immaginativo del nostro Paese.

⁵⁹ V. Iori, *Educazione e magia*, Bologna, Cappelli, 1983, pp. 46-47 e 59.

⁶⁰ M.T. Moscato, *Il sentiero nel labirinto. Miti e metafore nel processo educativo*, Brescia, La Scuola, 1998, pp. 10 e 21-22.

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Torino benefica: l'Istituto per l'educazione dei ciechi

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Charitable Turin: the Institute of education of the blind

ABSTRACT: The essay retraces, since its beginnings, the history of the Institute for the blind in Turin, founded in 1879 thanks to the initiative of Count Ernesto Riccardi di Netro who, in the same years, set up various charities in the Piedmont Capital. The initiative, of secular and liberal nature, represented, with the free school for rickets, a novelty in a context – that of education and assistance to the poorer classes, and suffering from an illness or permanent deficits – that, since the Carlo-Alberto age (1831-1849), had been distinguished by the primacy of the clergy and religious congregations. Financed by the nobility and rich bourgeoisie with a system of public subscription, the institute was not aimed at hospitalization only, but at providing a complete education: from literacy, to basic instruction in various subjects, to gymnastics, finally to apprenticeship – a novelty that soon encountered obstacles, especially from the widespread mentality that advocated a policy of confinement for persons with disabilities.

EET/TEE KEYWORDS: Blind; Special School; Special Education; Handicap; Equal Opportunity; Italy; XIX Century.

1. *Le origini*

Il cinque febbraio 1872 un anonimo cittadino decideva di devolvere all'amministrazione del capoluogo piemontese diecimila lire destinate all'apertura in Torino di un istituto per ciechi. A questa somma, insufficiente allo scopo e impegnata dalla giunta municipale in buoni del tesoro, si aggiunsero, nel 1875, dodicimila lire del testamento di Antonio Assalini, vincolate alla realizzazione dell'iniziativa entro quattro anni dalla morte del

benefattore¹. Ernesto Riccardi di Netro, assessore comunale all'istruzione e uno dei promotori della Reale Società ginnastica e della scuola per rachitici², prese a cuore il progetto: il 17 dicembre 1876, al termine di una lunga fase di contatti personali e di sensibilizzazione sui locali organi di stampa, indisse una pubblica adunanza nell'intento di individuare i mezzi più idonei ed efficaci a tradurre in atto il nobile proposito.

Nel corso dell'assemblea venne eletto un comitato promotore che, composto da uomini di primo piano dell'aristocrazia subalpina (i conti Giovanni Rebaudengo, Federico Sclopis, Massimo Biandrà), da professionisti (il dottor Alberto Gamba, l'avvocato Edoardo Pantas) e da esponenti di diverse confessioni religiose (il teologo Giovanni Genta, il pastore valdese Giovanni Pietro Meille e il professore dell'università israelitica Samuele Ghiron), rappresentava un vero e proprio gruppo di lavoro con il compito di condurre ricerche di settore, analizzare bisogni ed esigenze del territorio, definire finalità e caratteristiche della nascente istituzione, proporre soluzioni alle difficoltà di natura pratica ed organizzativa³. Furono raccolte notizie sui principali istituti per ciechi italiani (Milano, Napoli, Firenze, Roma) e stranieri (Parigi, Dresda, Losanna, Edimburgo) alla ricerca di un modello cui ispirare la propria azione educativa. Venne avviata, con l'ausilio delle autorità amministrative locali, un'indagine statistica sui non vedenti attraverso l'invio di una circolare ai comuni, alle congregazioni di carità e alle opere pie. L'analisi delle cifre confermava l'opportunità di una scelta non riconducibile alla semplice logica del ricovero: dei 279 ciechi residenti a Torino ben 199 erano, infatti, già ospitati in istituti a carattere assistenziale. Alcuni vivevano all'interno del Cottolengo, altri al Regio Ricovero della Mendicità, sorto nel 1837 come luogo di accoglienza per gli accattoni o gli inabili privi di mezzi⁴, altri ancora all'Ospizio della Carità,

¹ I documenti relativi alla donazione dell'anonimo torinese e al lascito testamentario di Assalini sono conservati in Archivio storico del comune di Torino (d'ora in poi ACT), *Affari d'istruzione e di beneficenza*, cartella 24, fascicolo 20.

² Per una biografia del conte cfr. D. Regis, *Commemorazione di Ernesto Riccardi dei conti di Netro*, Torino, Tip. G. Bruno e C., 1892; D. Chiaves, *Ernesto Riccardi di Netro: discorso commemorativo*, Torino, Tip. L. Roux e C., 1894 (poi riproposto dall'autore all'interno dei *Discorsi commemorativi di glorie italiane*, Torino, Roux Frassati e C., 1896, pp. 177-184).

³ Completavano l'elenco: Paolo Balbo di Vinadio; Pier Angelo Barberis; Filiberto Boratti; Carlo Canton; Gherardo Carrone di S. Tommaso; Alberto Gazzelli di Rossana; Paolo Massa; Luigi Mattirolo; Domenico Montaldo; Emilio Mylius; Giuseppe Nigra; Luigi Pagliani; Ernesto Riccardi di Netro; Augusto Salino; Daniele Sassi; Emilio Sineo; Carlo Trocelli. Sulla nomina del comitato promotore e sulla sua successiva suddivisione in un ufficio di presidenza e in quattro sottogruppi (organico, tecnico, statistico, finanziario) si vedano le due lettere che, indirizzate al sindaco il 19 e il 26 dicembre 1876, si trovano all'interno del già citato fascicolo.

⁴ In ordine alle finalità e alle caratteristiche dell'istituzione benefica cfr. Archivio di Stato di Torino, *Opere pie di qua dai monti*, mazzo 235. Sull'argomento si vedano inoltre i contributi di P. Baricco, *Il Ricovero della mendicità di Torino*, Torino, Tip. Bona, 1884 e di S. Goio, *Il regio ricovero di mendicità di Torino nella sua origine e nel suo svolgimento: cenni storici*, Torino, Coi tipi degli Artigianelli, 1898. Tra gli studi più recenti si segnala il volume di L. Bono, *Il Carlo Alberto già Regio Ricovero di Mendicità: una casa di riposo nella nostra Torino*, Torino, s.n., 2003.

dove nel 1855, grazie alla donazione di 50 mila lire del conte Luigi Tarino, era stata aperta una sala con diciotto posti letto riservati a questa specifica categoria di soggetti⁵. Se dal dato riferito al capoluogo piemontese si passa a quello dei circondari della provincia (459 ciechi) la percentuale delle persone affette da cecità presenti nelle strutture di pubblica e privata beneficenza subisce un considerevole calo con un rapporto, seppur ancora significativo, di uno a quattro.

L'idea di garantire anche una forma d'istruzione ai non vedenti rappresentava una novità nel panorama torinese dell'epoca sebbene non il primo tentativo in ordine di tempo: non bisogna dimenticare l'esperienza dell'istitutore vercellese Giovanni Battista Scagliotti che, all'epoca della Restaurazione, aveva avviato, con scarsa fortuna, una scuola per sordomuti e ciechi⁶. A beneficio dei primi era sorta nel frattempo la Regia Scuola Normale che, trasformata poi in un istituto convitto, si avvaleva di un sacerdote come responsabile dell'attività didattica⁷; nessuna analoga iniziativa, invece, aveva avuto come destinatari i secondi. È una disparità di trattamento che si comprende alla luce della diversa considerazione, maturata all'interno del mondo cattolico e negli ambienti della società civile subalpina, nei confronti delle due tipologie di disabilità: la mancanza dell'udito, causa del completo isolamento dell'individuo dalla realtà circostante, rendeva necessaria un'azione educativa ai fini di promuovere una conoscenza dei contenuti della fede senza contare che tale *handicap* non pregiudicava la possibilità di commettere reati a scapito della sicurezza dei cittadini e della tutela dell'ordine costituito; la privazione della vista, oltre a consentire, attraverso la narrazione, l'accostamento alle verità religiose, costituiva, agli occhi delle autorità, un fattore di scarsa pericolosità sociale⁸. La

⁵ Cfr. Regio Ospizio Generale di Carità di Torino, *Inaugurazione di un istituto pei ciechi: 26 agosto 1855*, Torino, Tip. Speirani e Tortone, 1855. Il numero dei non vedenti accolti nella struttura era destinato ad aumentare dopo il 1865, anno in cui veniva soppresso il sifilocomio dell'Opera Bogetto annessa all'Ospedale di Carità. Una breve cronistoria è contenuta in G. Strafforello (ed.), *La patria. Geografia dell'Italia. Provincia di Torino*, Torino, UTET, 1907, pp. 161-164.

⁶ L'istitutore vercellese aveva appreso a Vienna l'arte di istruire i sordomuti e i ciechi con il ricorso, rispettivamente, al sistema misto (mimica associata al linguaggio verbale) e al metodo della scrittura con i simboli a rilievo. Sulla storia della sua esperienza nel capoluogo torinese cfr. M.A. Pirello, *G.B. Scagliotti e l'istruzione dei sordomuti a Torino nel primo Ottocento*, Tesi di laurea, Università degli studi di Torino, Facoltà di Magistero, A.A. 1992-1993 e M.C. Morandini, *L'istruzione dei sordomuti a Torino nell'Ottocento*, in R. Sani (ed.), *L'educazione dei sordomuti nell'Italia dell'800*, Torino, SEI, 2008, pp. 39-109.

⁷ Riguardo alle origini e all'evoluzione della scuola normale, avviata da Carlo Alberto negli anni Trenta dell'Ottocento, cfr. M.C. Morandini, *La conquista della parola. L'educazione dei sordomuti a Torino tra Otto e Novecento*, Torino, SEI, 2010.

⁸ Non è un caso che nell'ampio resoconto fornito nel 1841 al sovrano in merito allo stato della beneficenza nel regno (ben oltre 260 pagine) compaia un'unica frase riferita ai non vedenti: in essa il conte Berardo di Pralormo rileva l'impossibilità di fornire dati sul numero «dei ciechi nati, pei quali non havvi ancora alcun apposito stabilimento» (Regia Segreteria degli Affari Interni, *Relazione a S.M. sulla situazione degli istituti di beneficenza dopo l'editto 24 dicembre 1836*, Torino, Stamperia Reale, 1841, p. 134).

popolazione, come si evince dalla memorialistica locale, vedeva addirittura nella presenza delle persone cieche agli angoli delle chiese una piacevole occasione di svago⁹.

D'altra parte in un contesto come quello dell'età Carlo albertina, dove tutte le esperienze di natura educativa ed assistenziale erano affidate al clero e alle congregazioni religiose (il caso più eclatante è quello rappresentato dalla Società degli Asili infantili)¹⁰, non erano ipotizzabili forme di intervento, in favore dei ceti poveri o di persone affette da malattie o da *deficit* permanenti, promosse da uomini di tendenze velatamente laiche o liberali. Non è quindi un caso che l'apertura dell'istituto dei ciechi, connotato in senso aconfessionale e laico, si collochi negli anni Settanta dell'Ottocento, in un clima politico caratterizzato da forti contrasti tra Stato italiano e Chiesa cattolica e da una visione della beneficenza non più circoscritta ai concetti di carità e pietà religiosa in linea anche con il nuovo orientamento positivistico nella cultura e nel settore delle scienze. È interessante notare lo stretto legame con il quasi concomitante avvio della scuola gratuita per ragazzi rachitici (1872) attestato dalla comune impostazione educativa e dalla presenza delle stesse figure di rilievo tra i promotori: si pensi, ad esempio, a Ernesto Ricardi di Netro, a Edoardo Pantas e ad Alberto Gamba, rappresentante quest'ultimo di quella categoria di medici che in questi anni, a Torino come in altre città della penisola, iniziavano a svolgere un ruolo importante nella cura, non solo fisica, delle classi popolari¹¹. Va inoltre tenuto presente che il principio dell'istruzione obbligatoria, sancito dalla legge Casati nel 1859, non era stato esteso ai soggetti con disabilità: non esistevano, quindi, nemmeno vincoli a livello normativo in merito all'apertura di scuole destinate ai non vedenti¹².

Il comitato della nascente istituzione era alla costante ricerca di nuovi introiti: i proventi, alquanto modesti, di una tombola di beneficenza organizzata

⁹ Si legge sul *bòrgno* 'd S. Austin, uno dei ciechi canori cittadini: «Attorno al *bòrgno* si radunavano comari e compari ad ascoltare le facili armonie, così come facevano le domestiche della vicina piazza centrale del mercato, dove la musa pizzaiola aveva trovato echi di larga ispirazione» (L. Collino, *Torino incipriata e romantica*, Torino, F. Casanova e C., 1931, p. 251).

¹⁰ In merito alla nota vicenda della Società degli Asili infantili cfr. R. Bettica, *Storia della società delle scuole infantili di Torino dal prerisorgimento ad oggi*, «I problemi della pedagogia», vol. 24, n. 6, 1978, pp. 811-840 e vol. 25, n. 1, 1979, pp. 37-54; C. Dogliani, *La società delle scuole infantili di Torino dalla fondazione (1839) alla prima guerra mondiale*, «Bollettino storico-bibliografico subalpino», vol. 94, n. 2, 1996, pp. 594-602 e 606-612; M.C. Morandini, *Tra pubblico e privato. Boncompagni educatore e ministro*, Milano, Educatt, 2012, pp. 7-29.

¹¹ Sulle origini della scuola gratuita per rachitici cfr. M.C. Morandini, *Tra educazione e assistenza: la scuola speciale per ragazzi rachitici di Torino*, «History of education & children's literature», vol. 7, n. 2, 2012, pp. 241-257.

¹² Il progetto relativo all'estensione dell'istruzione obbligatoria ai sordomuti e ai ciechi, presentato nel 1872 dal ministro Cesare Correnti, era infatti rimasto lettera morta. Bisogna attendere il regio decreto del 31 dicembre 1923 perché tale principio venga tradotto in legge. Sull'argomento cfr. R. Sani, *L'educazione dei sordomuti in Italia prima e dopo l'Unità. Itinerari, esperienze, discussioni*, in Id. (ed.), *L'educazione dei sordomuti nell'Italia dell'800*, cit., pp. 30-37.

nell'ambito di una fiera enologica e in occasione del congresso ginnico, previsto a Torino nella primavera del 1877, erano insufficienti allo scopo; né si poteva contare esclusivamente sui numerosi ma occasionali gesti di solidarietà di circoli, associazioni, commercianti o privati che devolvevano incassi di eventi e serate o l'equivalente della vendita di oggetti¹³. Si pensò, pertanto, di ricorrere alle tradizionali forme di sottoscrizione: il pagamento, per tre anni consecutivi, di almeno dieci lire dava diritto al titolo di socio azionista; la qualifica di socio perpetuo o fondatore era invece conferita a coloro che versavano, rispettivamente, lire 100 o 1.000 oppure assicuravano una rendita nel primo caso di 5, nel secondo di 50 lire¹⁴. Nell'appello rivolto alla cittadinanza, il 12 dicembre 1877, si legge:

Quando la carità cittadina avrà col generoso suo concorso aumentato in proporzione dei bisogni quel primo fondo che all'uopo già costituirono con benefiche elargizioni il signor Assalini di Genova ed un anonimo Torinese, anche la città avrà, al pari di Milano, di Genova, di Firenze, di Roma e di Napoli, un apposito istituto in cui vengono al povero cieco impartite quelle cure e quei conforti speciali che la specialità della sventura richiede. E questi, pur non vedendo la mano provvidenziale che lo accoglie per istruirlo ed educarlo al lavoro, potrà stringerla con riconoscenza e benedirlo; e la nuova istituzione rimarrà non ultimo certo fra i monumenti che onorano non pure la patria, ma l'umanità¹⁵.

Problematica appariva anche la ricerca di una sede idonea. In un primo tempo l'attenzione cadde sull'antico convento del Monte dei Cappuccini che, ceduto nel 1873 dal Demanio al comune di Torino, ospitava, nella parte non abitata dai frati e solo parzialmente occupata, il club alpino italiano fondato da Quintino Sella. I locali disponibili, però, parte di un complesso vetusto, necessitavano di costosi interventi strutturali, stimabili attorno alle 35 mila lire, somma che non comprendeva le spese della manutenzione ordinaria. Esistevano, poi, controindicazioni di natura igienico-sanitaria: dalla scarsa aerazione delle stanze all'umidità di un luogo in prossimità del fiume. Non era stata esclusa la possibilità di stabilirsi presso una delle opere pie presenti sul territorio:

¹³ Se i comici del circolo drammatico-umanitario torinese devolvevano il ricavato di una recita straordinaria presso il teatro D'Angennes, il commerciante Enrico Montabone, nel banco sotto i portici di Palazzo Carignano, vendeva, durante gli ultimi giorni della festa di carnevale, piante e fiori a beneficio del nascente istituto. Non va dimenticata nemmeno la cospicua offerta di lire 30 mila da parte delle Opere Pie S. Paolo.

¹⁴ Verrà poi aggiunta una quarta categoria, quella dei soci cooperanti, cioè di coloro che prestavano gratuitamente, a beneficio dell'istituto, la propria opera «mentale o professionale». Per avere un'idea del progressivo e costante aumento di adesioni all'iniziativa cfr. *Elenco dei cospicui benefattori. Soci fondatori, perpetui, triennali e cooperatori*, in P. Rossi, *Monografia storico-finanziaria-morale dell'Istituto per i ciechi: pubblicata nel suo venticinquesimo anno*, Torino, Paravia, 1905, pp. 80-88.

¹⁵ Comitato promotore, *Circolare dell'Istituto pei ciechi con cui espone il suo operato e chiede il soccorso della carità pubblica* (12 dicembre 1877), in ACT, *Affari d'istruzione e beneficenza*, cartella 24, fascicolo 20. Il testo fu pubblicato integralmente, lo stesso giorno, dalla «Gazzetta Piemontese» sotto la voce *Istituto pei ciechi di Torino* (n. 342, p. 3).

l'esperienza poco felice della fondazione Tarino all'interno del ricordato Ospizio della Carità aveva indotto tuttavia a scartare tale ipotesi. Le ragioni di carattere finanziario non rendevano proponibile nemmeno la costruzione *ex novo* di un fabbricato: l'unica soluzione realistica rimaneva pertanto quella di comprare o prendere in affitto uno stabile adatto alle esigenze di un istituto per ciechi.

Nell'aprile del 1878 il comitato promotore si sciolse per consentire l'insediamento del consiglio di amministrazione che, secondo le norme dell'articolo 4 dello Statuto approvato il 25 febbraio del 1877, doveva essere composto di nove membri: due in rappresentanza della provincia, due del municipio e cinque dell'assemblea generale dei soci¹⁶. Furono scelte persone che figuravano tra i promotori dell'iniziativa al fine di assicurare una continuità di intenti e di azione con la fase precedente: l'unica eccezione era rappresentata da Arrigo Assalini, designato dalla giunta comunale in memoria del padre¹⁷. Il nuovo direttivo, presieduto da Ernesto Ricardi di Netro, deliberò l'acquisto di una piccola casa con giardino nel borgo della Crocetta, una zona che l'ampia piazza d'Armi separava dalla città: nelle 42 mila lire, cifra richiesta dall'Opera S. Luigi Gonzaga proprietaria dell'edificio, confluirono anche le 5 mila stanziolate dalle autorità cittadine sul bilancio del 1879. Lirica e a tratti suggestiva è la descrizione della sede all'interno del saggio di Nino Pettinati:

In un sito ridente e ben soleggiato, la distesa dei campi alle spalle, un contorno di pioppi alla fronte, c'è una casina bianca a due piani cui è annesso un orticello [...]. La casina – egli scriveva – come è bianca di fuori, è bianca, linda al di dentro; tutto è luce, aria, profumo [...]. Questo, è vero, è l'albergo della sventura, ma la sventura amata, alleviata, tradotta in sorriso... Non vi sentite quasi ispirati? In quella calma profonda, in quella solitudine dei campi, mentre due ciechi s'accordano sul violino, mentre un altro più lontano studia a memoria, a pian terreno stridono i telai, di sopra prega un bambino, non vi par che si scriva una pagina di profonda, di vera, di soave poesia?¹⁸

Il 1° gennaio 1879, come annunciavano i manifesti affissi agli angoli delle strade, era prevista l'apertura della scuola con l'ammissione di ragazzi ciechi di età compresa tra otto e sedici anni (ai dieci iniziali se ne aggiunsero altri due tra marzo e aprile): erano richiesti, come ulteriori requisiti, la residenza

¹⁶ Il 24 maggio 1877 venne emanato un regio decreto che approvava lo Statuto e riconosceva al nuovo ente il carattere di corpo morale. Cfr. Istituto per i ciechi in Torino, *Statuto organico e regolamento d'amministrazione*, Torino, Vincenzo Bona, 1882, pp. 3-6. Nel 1879 il principe Amedeo, duca di Aosta, assunse la carica di presidente onorario, sostituito, nel 1890, dal figlio Emanuele Filiberto di Savoia. Tra le visite dei membri della casa regnante all'istituto merita una segnalazione quella della regina Margherita, avvenuta l'11 maggio 1897.

¹⁷ L'assemblea dei soci elesse il conte Riccardi di Netro, il teologo Genta, il cavaliere Mylius e gli avvocati Mattirolo e Nigra. Il conte Gazzelli di Rossana e l'avvocato Paolo Massa furono designati dalla provincia. Il cavaliere Pier Angelo Barberis affiancò Arrigo Assalini in rappresentanza del comune.

¹⁸ N. Pettinati, *Torino benefica*, in *Torino 1880*, Torino, Roux e Favale, 1880, pp. 851-852. Sulla suddivisione e organizzazione degli spazi interni cfr. *Istituto per i ciechi*, «Gazzetta Piemontese», n. 18, 18 gennaio 1879, p. 3.

nella provincia di Torino e il rilascio di un certificato attestante una sana costituzione fisica e la mancanza di deficit intellettivi¹⁹. Il pagamento della retta era subordinato alle condizioni economiche della famiglia: in caso di povertà era prevista, infatti, l'accettazione gratuita o a una quota mensile agevolata (20 lire invece del prezzo pieno di 40) grazie ai posti di fondazione temporanea o perpetua a carico di facoltosi cittadini, enti locali (comuni e province) o associazioni (dall'Opera Pia S. Paolo alle casse di risparmio)²⁰. Sotto la guida di don Giovanni Turchi²¹, sacerdote che aveva acquisito la necessaria competenza teorica e pratica presso i maggiori istituti italiani, gli alunni imparavano a leggere, a scrivere e a far di conto secondo il metodo Braille²² oltre ad apprendere nozioni di religione, storia sacra, geografia e grammatica. Allo studio di queste discipline si affiancava l'insegnamento musicale che comprendeva anche il canto e il suono di uno o più strumenti. Non veniva trascurata l'attività fisica, utile a correggere alcuni difetti comuni nella postura (il dondolare le braccia, il camminare curvo), né quella manuale all'interno di una scuola-laboratorio che, condotta da un abile maestro, era finalizzata alla produzione di manufatti. Non era invece necessario provvedere alle cure di carattere medico perché a Torino era attivo, dal 1844, un ospedale oftalmico, poi unito a quello infantile, che rispondeva ai bisogni di circa un migliaio di cittadini non abbienti del capoluogo e dei centri limitrofi²³.

I progressi degli allievi erano documentati, a distanza di pochi mesi, dalla cronaca di una visita all'istituto, apparsa sulle pagine della «Gazzetta

¹⁹ Una puntuale e dettagliata ricostruzione delle fasi che caratterizzarono la nascita e lo sviluppo dell'istituto torinese è contenuta in F. Gobetti, *L'istituto dei ciechi di Torino*, Torino, s.n., 1979-1980. Per le vicende relative, invece, al secondo dopoguerra si veda F. Levi, *Un mondo a parte: cecità e conoscenza in un istituto di educazione (1940-1975)*, Torino, S. Zamorani, 1997.

²⁰ Nel periodo compreso tra il 1879 e il 1905 i posti gratuiti e semigratuiti furono ben 33: 12 perpetui, 21 temporanei. Cfr. Rossi, *Monografia storico-finanziaria-morale dell'Istituto per i ciechi: pubblicata nel suo venticinquesimo anno*, cit., p. 71.

²¹ Giovanni Turchi conservò la carica di rettore fino al 1882. Alla guida della sezione maschile dell'istituto si alternarono, negli anni successivi, Giuseppe Cima, Emiliano Carlevatti e Luigi Mattalia.

²² Per uno sguardo all'evoluzione metodologica nel panorama italiano cfr. E. Ceppi, *I minorati della vista: storia e metodi educativi*, Roma, Armando, 1969 (ultima edizione 1992); M. Alliegro, *L'educazione dei ciechi: storia, concetti, metodi*, Roma, Armando, 1991; G. Pesci, S. Pesci, *Le radici della pedagogia speciale*, Roma, Armando, 2005, p. 33 e *passim*. Sulla storia dei singoli istituti cfr. G. Piersantelli, *L'istituto dei ciechi: cent'anni di storia*, Genova, Agis-Stringa, 1969; *Istituto per ciechi «Ardizzone Gioeni»: 90° anniversario*, Catania, CUECM, 2001; G. Bascapè, M. Canella, S. Reborà, *Luce su luce: l'impegno della solidarietà dalla carità alla scienza. Istituto dei ciechi di Milano: la storia, gli uomini, il patrimonio*, Milano, Istituto dei ciechi, 2003; M.L. Alfieri, P. Terranova, *Un istituto nel cuore della città: 125 anni di vita dell'istituzione per i ciechi a Reggio Emilia*, Reggio Emilia, Antiche porte, [2008].

²³ Le origini risalivano al 1° gennaio 1838 con l'apertura di un dispensario pubblico su iniziativa dell'oculista Casimiro Sperino, poi coadiuvato dai colleghi Valerio e Maffoni: si trattava di una struttura sorta come ambulatorio e ospedale chirurgico diurno. Sulla figura del fondatore si veda A. Gamba, *Casimiro Sperino (1812-1894): commemorazione*, Torino, Tip. Dell'Unione tipografica editrice torinese, [1894].

Piemontese». Dalla descrizione puntuale e accurata, di cui proponiamo un ampio stralcio, emerge lo stupore per la modalità serena e gioiosa che caratterizzava il processo di apprendimento:

Una porticina riesce in un andito e poco poi in cortiletto e in un giardino all'aperto. Vi entrammo che i poveri ciechi giocavano e si divertivano. Sicuro, i poveretti in due mesi hanno pigliato tanta conoscenza dei luoghi, delle cose, delle voci, che vanno, vengono, a braccetto, sciolti, chiamandosi a nome, salutandosi, zufolando, giocherellando, saltando perfino, sicuri come se ci vedessero a occhi aperti. A prima vista è spettacolo doloroso veder tanti occhi spenti, abbacinati! Eppure quei fanciulli son rassegnati, sono anzi allegri, contenti e vispi e paiono non addarsi della loro disgrazia. A un tratto una voce li chiama: Attenti! Agli esercizi ginnastici! Un grido di compiacenza accoglie questo invito. Oh sì, la ginnastica! E come la fanno bene! Che precisione di movimenti! Braccia avanti, in alto, di fianco, a posto; marcie con battimani, esercizi colle bacchette; tutto eseguito con una perfezione, con un sorriso, con una compiacenza che fa meraviglia. Li lasciamo in cortile e passiamo a visitare i locali [...]. I poveri ciechi son raccolti nella scuola, seduti sui loro banchi in giro [...]. Da metà gennaio a oggi, quei giovanetti hanno imparato a leggere; certamente leggono coi polpastrelli delle dita i caratteri in rilievo impressi su d'un cartoncino apposito. Due o tre danno un saggio di lettura, un altro di computo, un altro di nozioni grammaticali... Il Rettore insegnante scrive frattanto, sopra un foglio apposito a punti rilevati, sistema Braille, i nostri nomi abbastanza barbari, certo sconosciuti la dentro. E un di quei poveri ciechi li legge d'un fiato²⁴.

Il compiacimento per i risultati ottenuti traspare anche dalle parole indirizzate ai soci nel corso della prima assemblea generale, tenuta il 22 febbraio 1880. Nel testo, pubblicato dalla tipografia torinese De Rossi, si esprime viva soddisfazione per un miglioramento fisico, morale e intellettuale degli allievi superiore alle più rosee aspettative: in poco più di un anno evidente era stata la trasformazione di «quelle tenere pianticelle avvizzite e cadenti», diventate forti, robuste e sane; sorprendente era lo stesso profitto scolastico che, proporzionato alle capacità dei singoli, denotava l'efficacia di una scelta volta non solo ad alternare studio e attività fisica per non affaticare eccessivamente spirito e corpo, ma anche a tenere conto degli interessi, delle inclinazioni e della posizione sociale di ciascuno²⁵.

Si trattava però solo del primo passo verso la realizzazione di un progetto di più ampio respiro che, accanto all'auspicata apertura di una sezione femminile, contemplava l'idea di istituire una casa di ricovero destinata ai ciechi adulti di entrambi i sessi «non più suscettibili di una istruzione speciale». Non era esclusa nemmeno la possibilità di attivare una struttura di accoglienza e di lavoro per

²⁴ *Una visita all'Istituto dei ciechi*, «Gazzetta piemontese», n. 93, 3 aprile 1879, p. 2. Alcuni giorni prima si era recato presso l'istituto il sindaco della città, Luigi Ferraris: nell'occasione aveva ricevuto in dono un saggio di scrittura Braille ancora privo dei segni di maiuscola e di punteggiatura. Una copia del testo è conservata in ACT, *Affari d'istruzione e beneficenza*, cartella 24, fascicolo 30.

²⁵ Cfr. *Relazione del Consiglio d'Amministrazione all'Assemblea generale dei soci* (22 febbraio 1880), Torino, Tip. De Rossi, 1880, pp. 9-11.

ospitare coloro che, al termine del percorso di educazione e d'istruzione, non erano in grado di fare ritorno alle proprie case. Occorreva a tal fine un più incisivo concorso di privati, di enti pubblici e di corpi morali nell'erogazione di sovvenzioni e sussidi. Le entrate disponibili non consentivano di provvedere alle diverse categorie di soggetti affetti da cecità, ma erano sufficienti a garantire la sicurezza economica: basta confrontare le cifre relative al bilancio attivo (231, 666, 73) e a quello passivo (181, 981, 60) del 1880 per rendersi conto della solidità finanziaria dell'istituto e comprendere, quindi, la decisione di porsi alla ricerca di una sede più ampia. Grazie anche ai soldi ricavati dalla vendita della casa in borgo Crocetta, venne acquistato, alla barriera di Nizza, una zona periferica della città in piena espansione, un terreno di 6.600 metri quadrati, dove sorgevano alcuni capannoni di proprietà della Fabbrica Italiana delle ceramiche²⁶. L'ingegnere Trocelli, coadiuvato dal geometra Golzio, costruì il nuovo edificio che, inaugurato nel luglio del 1880, aveva una capienza di sessanta posti letto da suddividere equamente tra maschi e femmine²⁷: le prime sei allieve furono accolte nell'autunno di quello stesso anno in un'apposita sezione, diretta dalla maestra Orsolina Turchi²⁸. Il rettore e la rettrice erano affiancati, nell'esercizio dell'attività didattica, da cinque insegnanti interni o esterni: nel caso delle giovinette era prevista, secondo le consuetudini del tempo, anche la presenza di un'ispettrice con funzioni di sorveglianza e di controllo²⁹.

2. *La vita tra le mura dell'Istituto*

La vita quotidiana degli allievi e delle allieve era scandita dai ritmi e dall'organizzazione degli spazi e delle attività contemplate negli articoli del regolamento 8 giugno 1882³⁰. L'accento era posto, in primo luogo, sulla necessità

²⁶ La somma versata era di 166 mila a fronte delle 50 mila ricavate dalla vendita dello stabile. Il precedente tentativo di acquistare dall'Accademia di Agricoltura una casa e i terreni confinanti con la sede in borgo Crocetta non aveva sortito l'esito sperato.

²⁷ Per una descrizione dettagliata del nuovo e più ampio edificio cfr. Rossi, *Monografia storico-finanziaria-morale dello Istituto per i ciechi pubblicata nel suo venticinquesimo anno*, cit., pp. 48-51.

²⁸ Maestra originaria di Castelnuovo don Bosco, in provincia di Asti, assunse la carica di rettrice dopo quattordici anni di onorato servizio presso le scuole elementari di Pergola e del paese natale. Nel 1894 abbandonò l'istituto per aprire, sempre a Torino, un «ricovero per poveri ciechi e povere cieche già fatti grandicelli», esperienza che diresse fino al 1919, anno della morte. Cfr. *In memoria di Orsolina Turchi*, «I poveri ciechi di corso Napoli», n. 1, 1920, pp. 6-8; Gobetti, *L'istituto dei ciechi a Torino*, cit., pp. 25-26.

²⁹ L'elenco del personale dell'istituto comprendeva, inoltre, due impiegati amministrativi e sette inservienti. Presso la struttura prestavano gratuitamente la propria opera alcune figure del comparto sanitario: un medico, un dentista e un farmacista.

³⁰ Il regolamento, deliberato dall'assemblea generale dei soci, aveva ottenuto l'approvazione della Deputazione Provinciale di Torino il 14 settembre di quello stesso anno. Nella versione,

di promuovere un clima di «serena indulgenza» non solo nelle ore dedicate allo studio: alla sollecitazione rivolta agli insegnanti, in merito all'utilizzo di «modi affettuosi e cortesi» con la scolaresca, faceva riscontro, infatti, l'invito agli inservienti ad assumere un atteggiamento garbato, rispettoso e attento alle esigenze dei giovani ospiti³¹.

Era una preoccupazione destinata a caratterizzare l'intervento educativo anche negli anni successivi:

All'affetto nell'ammonire e nel correggere noi volemmo – si legge in una relazione morale – che molto si badasse da tutti, perché ne pare che nessuno più del cieco ne abbisogni essendo, egli inclinato a temere che non lo si ami quanto il veggente... In tal guisa il cieco si persuaderà che le persone, alle cui cure è affidato, desiderano di tutto cuore la sua educazione, e ad esse affezionandosi ne asseconderà l'utile proposito³².

Non mancavano, tuttavia, disposizioni precise e puntuali volte ad assicurare l'ordine e il mantenimento della disciplina: in linea con la normativa vigente all'interno dei collegi, era proibito acquistare provviste e trattenere presso di sé somme di denaro; allo stesso modo venivano circoscritte, entro momenti ben definiti, le occasioni di uscita dall'istituto e le visite dei parenti. In caso di violazione delle regole spettava al rettore o alla rettrice infliggere le punizioni: non era esclusa la possibilità di ricorrere all'espulsione a fronte di gravi forme di negligenza o insubordinazione³³. La condotta esemplare nelle aule, nei laboratori e durante la ricreazione diventava oggetto di un pubblico encomio o della concessione di un piccolo premio di natura pecuniaria. Il compito di favorire lo sviluppo della dimensione etica, affidato ai responsabili delle due sezioni e indirettamente al Direttore dell'Interno³⁴, era esteso al sacerdote, tenuto non solo a garantire la conoscenza delle verità di fede e l'accostamento ai sacramenti agli alunni cattolici (gli altri potevano essere educati in un locale

pubblicata successivamente, le principali modifiche riguardavano l'introduzione della figura del direttore di Economia nel consiglio amministrativo e una più precisa e puntuale definizione delle condizioni finanziarie richieste per attivare posti gratuiti a carico di enti pubblici o di singoli benefattori. Cfr. Istituto pei ciechi di Torino, *Regolamento di amministrazione approvato nelle sedute del 24 giugno 1877 e 3 giugno 1888*, Torino, Tip. L. Roux e C., 1889, pp. 7-20.

³¹ Si vedano, nello specifico, gli articoli 33 e 34 del regolamento. Cfr. Istituto pei ciechi in Torino, *Statuto organico e regolamento d'amministrazione*, cit., p. 17.

³² Gobetti, *L'istituto dei ciechi di Torino*, cit., p. 21.

³³ Nei primi venticinque anni si segnala un unico caso con l'allontanamento dall'istituto di tre allievi per non meglio precisati atti d'indisciplina. Qualche volta erano gli stessi ciechi a esprimere, in modo fermo e risoluto, il proposito di far ritorno alle proprie case nella convinzione di essere in grado, una volta raggiunta la libertà, di provvedere a se stessi attraverso il lavoro: di fronte a tale atteggiamento, spesso caparbio e ostinato, la direzione era costretta a cedere, mantenendosi però irrimovibile circa l'impossibilità di un'eventuale riammissione.

³⁴ Il direttore dell'Interno era, insieme ai colleghi della Contabilità, della Segreteria e del Contenzioso, una delle quattro figure cui erano riconosciute, all'interno del consiglio di amministrazione, specifiche attribuzioni.

distinto da un proprio ministro del culto)³⁵ ma anche a dedicare, ogni settimana, una conferenza a temi di «vita domestica e sociale» nell'intento di promuovere nell'uditorio «l'intimo senso del dovere, la convinzione dell'utilità nell'obbedire, la sottomissione spontanea e benevola ai comandi, l'affetto reciproco fra chi vive sotto il medesimo tetto e gode degli stessi vantaggi»³⁶.

L'educazione religiosa e morale era parte di un più ampio programma che comprendeva, inoltre, «l'istruzione scolastica, musicale e industriale»: la durata del percorso di studi, inizialmente a totale discrezione degli insegnanti, chiamati a valutare ogni singolo caso sulla base «della attitudine e capacità» degli allievi, venne fissata, dopo il 1888, in un quinquennio, come quella della scuola elementare pubblica. Erano previsti momenti di ricreazione nei quali gli alunni si dedicavano al gioco (i maschi alla trottola, le femmine al girotondo e al salto alla fune)³⁷: le passeggiate, seppur rare, rappresentavano un'altra occasione di svago oltre ad essere benefiche per la salute. Agli esami di fine anno, sostenuti alla presenza di docenti esterni, la percentuale dei promossi risultava sempre elevata: nel 1893, ad esempio, solo uno dei trentasei candidati fu rimandato. Ai ciechi, non in tenera età e adeguatamente preparati, fu riconosciuto il titolo di «sottomaestri» con la responsabilità delle prime tre classi del corso inferiore: da Antonio Clerico, esperto di violino, al più noto Giovanni Brossa, destinato a una brillante carriera culminata con l'incarico di direttore didattico³⁸; a questa particolare categoria di istitutori veniva corrisposta una «gratificazione» come forma di ricompensa, ma anche di risarcimento per i mancati introiti di cui beneficiavano i compagni grazie all'impiego nelle attività lavorative³⁹.

³⁵ Fino al 1905 non si segnala nessun alunno di fede non cattolica: la libertà religiosa, tutelata dall'articolo 30 del regolamento, rappresentava quindi un'affermazione di principio più che il tentativo di rispondere a un'esigenza concreta. L'istituto si era avvalso prima di sacerdoti esterni, poi di cappellani interni e, infine, dell'opera dei padri rosminiani.

³⁶ Rossi, *Monografia storico-finanziaria-morale dello Istituto per i ciechi pubblicata nel suo venticinquesimo anno*, cit., p. 38.

³⁷ Un accenno ai giochi preferiti dai ciechi dell'istituto di Torino è contenuto in *Cuore* di De Amicis: «Tirano la trottola, e a sentire il ronzo che fa girando, vanno dritti a pigliarla senza sbagliare. Fanno correre il cerchio, giocano ai birilli, saltano con la funicella» (p. 102).

³⁸ Giovanni Brossa (Poirino, 1875-Torino, 1939): dopo aver frequentato l'istituto, dove giovanissimo divenne maestro dei suoi compagni, conseguì la licenza magistrale a Valsalice e, nel 1916, il diploma universitario di perfezionamento riservato a coloro che provenivano dalle scuole normali. Nel 1927 s'iscrisse anche al corso di specializzazione della scuola di metodo per istitutori di ciechi, aperta a Roma tre anni prima. Nominato direttore didattico dell'istituto, nel 1925 fondò a Torino la sezione locale dell'Unione italiana ciechi. Per ulteriori notizie cfr. *Piccola cronaca*, «La famiglia cristiana», n. 9, 1939, pp. 3-4; *La morte del direttore dell'istituto dei ciechi*, «La stampa», n. 180, 31 luglio 1939, p. 2.

³⁹ All'articolo 31 del regolamento del 1882 si auspicava la creazione, mai di fatto realizzata, di una scuola normale nei locali dell'istituto, volta alla preparazione di «buoni maestri nei vari rami d'istruzione»: è ragionevole individuare nella mancanza di adeguate risorse economiche il fattore all'origine dell'accantonamento della proposta.

Il materiale didattico era costituito da una serie di libri, scritti in Braille e impressi in minima parte presso la stamperia dell'istituto⁴⁰, oltre che da una collezione di oggetti (una sorta di piccolo museo scolastico) finalizzata a favorire una conoscenza dei primi rudimenti del sapere con il ricorso al tatto⁴¹. Non potevano mancare gli strumenti musicali, a corda (pianoforte, violino) o a fiato (flauto, clarinetto), indispensabili per lo studio di una disciplina di primo piano nell'educazione dei non vedenti⁴². Molteplici erano, infatti, le ragioni che consigliavano di investire tempo ed energie in tale ambito d'insegnamento: dalla più volte riscontrata inclinazione naturale alla capacità di infondere sollievo in un animo tendente alla tristezza; dall'acquisizione di una specifica competenza ai fini di un positivo inserimento nella vita sociale alla volontà di promuovere il sentimento del bello attraverso l'armonia dei suoni o della voce umana. Grazie al progressivo aumento degli allievi fu possibile creare, nei primi anni Ottanta, due orchestre, distinte per sesso: si esibivano nei saggi musicali, in programma ogni anno a maggio e a settembre al termine dell'assemblea generale dei soci, in serate di beneficenza o in feste private. Degno di nota è, ad esempio, il concerto tenuto il 2 luglio 1884 nell'ambito delle manifestazioni connesse all'esposizione nazionale di Torino: sotto la direzione di Maurizio Giovannetti e Andrea Mayer, maestri rispettivamente di piano forte e di violino, venivano proposte al pubblico arie eseguite da solisti, da due o più allievi o dall'intero corpo musicale⁴³.

Questo imponente evento, destinato a catalizzare sul capoluogo piemontese l'attenzione della penisola, poteva configurarsi come una preziosa vetrina anche per i prodotti a carattere manifatturiero realizzati dai non vedenti: si trattava, nello specifico, di «oggetti da panieraio, come trecce, stuoie, zerbini in cocco

⁴⁰ Nel 1882 il ministero aveva donato all'istituto un torchio proveniente dall'Officina Carte Valori di Torino: tra i libri stampati a uso interno figurano le celeberrime *Prime letture* di Giuseppe Taverna. Agli inizi del Novecento il servizio non era più attivo: il profitto che se ne ricavava, infatti, era scarso a fronte delle spese sostenute.

⁴¹ Interessante è la descrizione dell'utilizzo da parte del maestro di una piccola casa di legno scomponibile in più parti: «La fa toccare dai ciechi incominciando dal tetto; e scendendo di piano in piano in maniera ch'essi si accorgano delle finestre che ha e del portone per il quale ci si entra, li fa arrivare alle fondamenta. Poi incominciando dal tetto, a poco a poco lo rimuove, e quindi fa toccare tutte le divisioni del piano superiore, uguale cosa fa per il secondo e per il primo (supponendo che la casa abbia tre piani). Sceso al pian terreno ricompono la casa in senso inverso, andando dal primo piano sopra il pianterreno, al secondo e al terzo e al tetto che ripone al posto suo. Poi, venendo a ciascuna stanza in particolare, fa che per mezzo del tatto i ciechi acquistino l'idea dei mobili delle stanze, degli utensili e delle stoviglie per la cucina e per la sala da pranzo» (Rossi, *Monografia storico-finanziaria-morale dello Istituto per i ciechi pubblicata nel suo venticinquesimo anno*, cit., p. 21).

⁴² Per un'accurata descrizione in ordine alle principali differenze nelle modalità di apprendimento e di esecuzione di un brano musicale cfr. *ibid.*, pp. 27-28.

⁴³ Un elenco dettagliato del programma è contenuto nell'articolo *Concerti di beneficenza*, «Gazzetta Piemontese», n. 122, 2 luglio 1884, p. 1. Nel mese di maggio anche i ciechi dell'Istituto di Milano avevano tenuto due concerti nel calendario delle iniziative promosse per l'Esposizione universale torinese.

ed erba sparto, canestri, scope» (nel caso delle giovinette anche «di lavori di maglia all'uncinetto o con ferri da calza»)⁴⁴. Nella galleria, sede delle mostre allestite dalle istituzioni scolastico-educative rivolte alle diverse categorie di soggetti svantaggiati, era ospitata anche una rappresentanza di ciechi e cieche, sollecitati a fornire una prova delle proprie abilità nello studio e nell'esecuzione di lavori manuali. Emblematica, ancora una volta, è la testimonianza offerta dai redattori della «Gazzetta Piemontese»:

In mezzo agli svariati oggetti usciti dalle loro mani stanno seduti ad un banco quasi tutti i giorni, e specialmente nelle ore pomeridiane, alunni ciechi dell'uno e dell'altro sesso che danno saggio – si legge in un articolo – di ciò che sono capaci di fare innanzi al pubblico che sempre numeroso si affolla attorno a quei banchi [...]. Interrogati dai visitatori ciechi e cieche rispondono solleciti, con buon garbo e sovente anche con ispirito, dando notizie di sé, dei compagni, dello studio, dell'istituto. Quasi tutti dicono che il loro passatempo più caro è la musica alla quale tutti quanti si dedicano, e dimostrano ai loro maestri e benefattori la più viva riconoscenza⁴⁵.

I proventi ricavati dalla vendita dei manufatti andavano a beneficio in parte dell'istituto, in parte degli allievi e delle allieve sotto forma di deposito su un libretto della Cassa di Risparmio⁴⁶. Era un'utilità non circoscritta alla sfera economica: l'avviamento a un mestiere favoriva, infatti, anche l'acquisizione dei concetti di ordine e di disciplina oltre ad allontanare dal non vedente i pensieri futili e tristi connaturati al suo animo. La volontà di assicurare, attraverso adeguati sbocchi professionali, un positivo inserimento nel tessuto sociale incontrava, però, numerosi ostacoli: paradossalmente la stessa attività produttiva dell'istituto, in grado di praticare una politica concorrenziale dei prezzi grazie all'utilizzo di una manodopera a basso costo, rendeva scarsamente competitivo il lavoro del cieco che intendeva mettersi in proprio.

Ne è una chiara espressione, a distanza di pochi anni, la scelta di istituire una sezione professionale che, quasi completamente riservata ai ragazzi giunti al termine del percorso di studi, rappresentava una rinuncia al dichiarato obiettivo dell'autosufficienza sotto il profilo finanziario. Si configurava, infatti, come una

⁴⁴ *Relazione del Consiglio d'Amministrazione all'Assemblea generale dei soci* (22 febbraio 1880), cit., p. 9 e Rossi, *Monografia storico-finanziaria-morale dello Istituto per i ciechi pubblicata nel suo venticinquesimo anno*, cit., p. 32. Degna di nota, in tale ambito, fu l'opera di Giovanni Battista Varrone che, consigliere dal 1890 al 1894, aveva maturato una significativa esperienza durante i viaggi compiuti presso gli istituti per ciechi di Belgio e Francia.

⁴⁵ *I ciechi all'esposizione*, «Gazzetta Piemontese», n. 166, 17 giugno 1884, p. 2. La giuria dell'esposizione conferì all'istituto la medaglia d'oro, come riconoscimento per il notevole ed efficace lavoro svolto. Analogò fu il premio ottenuto nella successiva edizione del 1898.

⁴⁶ Il denaro, come consuetudine, veniva riscosso dai ciechi al momento dell'uscita dall'istituto. Nessuna ipotesi era però esclusa: «Se essi muoiano nell'Istituto, tale somma – si legge all'articolo 41 – andrà a favore dei loro eredi testamentari o legittimi. E potranno anche gli stessi allievi disporre della somma sovraddetta con atto tra i vivi a favore di *congiunti* col consenso del Consiglio d'Amministrazione» (*Regolamento* [8 giugno 1882], in Istituto per i ciechi in Torino, *Statuto organico e regolamento d'amministrazione*, cit., p. 18).

sorta di «laboratorio protetto» che, ispirato a una logica di natura assistenziale, non era incline a favorire l'emancipazione e lo spirito di iniziativa. D'altra parte è sufficiente leggere le condizioni richieste per l'attribuzione dei posti disponibili per rendersi conto della continuità tra il corso d'istruzione elementare da un lato e la nuova sezione dall'altro:

I posti – è scritto all'articolo 4 del regolamento – saranno conferiti dal Consiglio collo stesso criterio adottato per la Sezione dei più giovani; e così vi saranno posti gratuiti nella misura consentita dalle condizioni finanziarie dell'istituto, e posti a pagamento di pensione annua di lire 500. Potranno anche essere conferiti posti a mezza pensione ai ciechi, le cui famiglie versino in istrette condizioni finanziarie; avranno sempre identico trattamento così i ricoverati paganti come i gratuiti⁴⁷.

Una nuova consapevolezza sembra emergere all'inizio del Novecento di fronte al fenomeno di bambini e bambine che, diventati uomini e donne in istituto, avevano vissuto un'esistenza «mutilata di esperienze e di affetti». Interessante è l'accento posto sull'incompletezza di un processo di crescita e di maturazione all'interno di un contesto che, di fatto, con la preoccupazione di tutelare il cieco dai pericoli e dai rischi del mondo esterno, lo isolava dal consorzio civile:

Diversi sono i bisogni e le aspirazioni dell'adulto, che vogliono essere considerati, perché altrimenti accade che il cieco – si legge, infatti, nella relazione morale del 1903 – resti nell'Istituto, ove non abbia parenti, o amici che lo accolgano nella loro casa, ma la sua sarà una vita stentata che gli farà crescere nel cuore un'avversione all'Istituto stesso, ove non potrà godere la libertà alla quale aspira. Imperocché è cosa che può essere avvertita da tutti coloro che hanno posto mente alle inclinazioni umane, che fra i venticinque e i trent'anni si manifesta nell'individuo una spiccata tendenza a vivere una vita più autonoma, a provvedere alle cose sue, a formarsi un peculio con il frutto totale o parziale del proprio lavoro⁴⁸.

Era un'affermazione destinata, tuttavia, a non trovare riscontro nella realtà: non a caso il progetto di aprire una casa lavoro, finalizzata a occupare durante il giorno i non vedenti adulti che dimoravano in città, rimase lettera morta. Le aspirazioni dei ciechi alla libertà, ritenute di per sé legittime, si scontravano, infatti, con la mentalità che, diffusa tra i cittadini facoltosi dediti alla beneficenza, continuava a individuare nelle istituzioni totali, e quindi in una politica di reclusione, l'unica possibile risposta ai bisogni dei soggetti disabili.

Tra il 1879 e il 1905 gli alunni furono 186 con una percentuale di femmine pari al 43%: di ciascuno conosciamo nome e cognome, anno e luogo di nascita, data d'ingresso e di uscita dall'istituto. Dall'esame dei dati è possibile ricavare alcune interessanti notizie in merito ai criteri di ammissione, alla provenienza

⁴⁷ *Regolamento per la sezione professionale*, in Istituto pei ciechi di Torino, *Regolamento di amministrazione approvato nelle sedute del 24 giugno 1877 e 3 giugno 1888*, cit., p. 21.

⁴⁸ Rossi, *Monografia storico-finanziaria-morale dello Istituto per i ciechi pubblicata nel suo venticinquesimo anno*, cit., pp. 63-64.

geografica e al periodo trascorso all'interno della struttura. Gli allievi venivano accolti in tutti i mesi dell'anno a dimostrazione di una certa flessibilità nello svolgimento dei programmi. Al significativo numero iniziale di frequentanti per entrambe le sezioni (12 ciechi e 6 cieche) corrispose nel corso degli anni una generale tendenza al ribasso con notevoli margini di oscillazione: per i ragazzi si passa dalle 9 unità del 1886, alle 3 del 1896, alle 2 del 1902; per le ragazze dalle 5 del 1887, alle 3 del 1895, alla sola Salono Maria nel 1904⁴⁹. È un fenomeno pienamente comprensibile se si considera che l'accettazione di nuovi nominativi era subordinata, di volta in volta, allo stato delle finanze. Gli iscritti erano, in massima parte, originari delle diverse province del Piemonte (i torinesi rappresentavano circa il 20% del totale): non mancano, tuttavia, ciechi provenienti da altre regioni non necessariamente limitrofe (Liguria, Valle d'Aosta, Lombardia, Emilia, Sardegna, Puglia, Basilicata)⁵⁰. Esigua risulta la quota di coloro che erano stati ammessi oltre i 16 anni, termine massimo consentito dal regolamento: non era invece infrequente il caso di alunni accolti a 6 o 7 anni, in anticipo, quindi, rispetto alla soglia minima prevista. Non sembra esistere una correlazione diretta tra l'età d'ingresso e il periodo, abbastanza vario, di permanenza: dei 75 alunni ritornati a casa (meno della metà della cifra complessiva) 13 avevano limitato la frequenza ad un arco di tempo inferiore o pari al biennio; 18 (in netta prevalenza maschi) avevano completato il percorso di studi entro il quinquennio in linea con la durata della scuola elementare per i normodotati; 11 (di cui sei femmine) erano rimasti tra le mura dell'opera pia per più di 10 anni. Gli ultimi dati, ancora più significativi se letti alla luce della sproporzione numerica tra i due sessi, mostrano come l'istituto rappresentasse un luogo di rifugio e di protezione soprattutto per le donne, più deboli e difficilmente in grado di trovare una propria collocazione nel mondo esterno: basti pensare che ben 55 erano quelle ospitate all'interno della struttura nel 1905 (alcune dall'epoca dell'apertura o dagli anni immediatamente successivi). Se è vero che, secondo il quadro fornito dalla statistica, erano ancora numerosi anche gli uomini, è altrettanto vero che la loro presenza era in parte giustificata dalla possibilità di accedere alla sezione professionale che, promossa nel 1887, era ad appannaggio esclusivo dei ciechi maschi.

L'esperienza, sorta grazie alla generosità, all'impegno e alla politica lungimirante del conte Ricardi di Netro, era destinata nel 1926 a trasformarsi in uno dei dieci istituti italiani ritenuti idonei a soddisfare l'assolvimento dell'obbligo scolastico sancito con regio decreto cinque anni prima.

⁴⁹ Non mancano eccezioni nella sezione femminile con una conferma (anni 1880 e 1896) o, addirittura, un innalzamento del numero (7 frequentanti nel 1881 e 1897). È un fenomeno che si spiega, presumibilmente, con la notevole disparità tra maschi e femmine rispetto al dato iniziale. Cfr. *Elenco degli allievi e Elenco delle allieve*, in *ibid.*, pp. 72-78.

⁵⁰ Nell'elenco figurano anche allievi nati all'estero: da Giordano Candido (Principato di Monaco) a Meinrad Mosoni (Zermatt); da Gioachino Pantalone a Marietta Perrone, entrambi del Cairo; da Emilio Panetti (Costantinopoli) a Grenna Teresa (Montevideo).

*Sources and
Documents*



Fonti e
Documenti

La Sezione Maestre e Maestri della Camera del Lavoro di Milano (1893-1898)

Parte prima*

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Male and female teachers Section of the Chamber of Labour in Milan (1893-1898). First part

ABSTRACTS: The history of the of male and female teachers Section of the Chamber of Labour in Milan is, for the very first time, retraced from its establishment in 1893 up to the year 1898, thanks to the thorough examination of archival documentation preserved in the Archives of the Giangiacomo Feltrinelli Foundation in Milan, more precisely in the Luigi Musini Fund, which has never been analysed to date. The remaining minutes of the Meetings of the Section (i.e. concerning the years 1894-1898) are here reproduced, preceded by an introduction in which a state of the art of the historical-educational research on the teachers' associations in Italy is accurately rebuilt, and then retraced the historical events which marked constitution, development and dissolution of this association – a harbinger of a new teachers' movement which would led finally to the birth of the National Teachers' Union.

EET/TEE KEYWORDS: Teachers Organisation; Teaching Profession; Female Work; Teacher Role; Social Perception; Milan; Italy; XIX Century.

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Premessa

È ben noto agli studiosi storico-educativi del nostro paese come la ricerca sulla nascita e lo sviluppo dell'associazionismo magistrale sia ancora in gran parte da esplorare. È solo a partire dagli anni Settanta che si sono avuti i primi studi inerenti i maestri italiani e volti ad approfondire la loro opera, il loro status sociale, le loro rivendicazioni e battaglie, le loro iniziative e organizzazioni professionali¹; più recentemente, infine, si sono avuti ampi e interessanti studi anche in merito alle riviste magistrali sorte insieme con le associazioni insegnanti².

Mentre, come rilevato da Ester De Fort³, risultano ormai indagate nelle loro linee di fondo la costituzione delle principali associazioni magistrali nazionali quali l'Unione Magistrale Nazionale e la Tommaseo⁴, come notato invece da Alberto Barausse «risultano [ancora] scarsi gli studi su specifiche esperienze di associazionismo magistrale»⁵.

¹ Per quanto riguarda gli studi sulla scuola e sull'associazionismo degli insegnanti elementari si segnalano in particolare gli studi di Ester De Fort: E. De Fort, *La scuola elementare dall'unità alla caduta del fascismo*, Bologna, il Mulino, 1996; Ead., *L'associazionismo degli insegnanti elementari dall'età giolittiana al fascismo*, «Movimento operaio e socialista», vol. IV, n. 4, 1981, pp. 375-409; Ead., *L'associazionismo magistrale dall'inizio del secolo alla Prima guerra mondiale*, in *Storia della scuola e storia d'Italia dall'Unità ad oggi*, Bari, De Donato, 1982; Ead., *I maestri di scuola*, in F. Della Peruta, S. Misiani, A. Pepe (edd.), *Il sindacalismo federale nella storia d'Italia*, Milano, Franco Angeli, 2000, pp. 184-218. Per le vicende delle associazioni degli insegnanti secondari si rinvia agli studi di L. Ambrosoli, *La Federazione Nazionale Insegnanti Scuole Medie dalle origini al 1925*, Firenze, La Nuova Italia, 1967. Più in generale, per un discorso sulla scuola italiana, si veda L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla legge Casati al centrosinistra*, Brescia, La Scuola, 2001. Per una riflessione sulla storia della cultura scolastica si veda D. Julia, *Riflessioni sulla recente storiografia dell'educazione in Europa: per una storia comparata delle culture scolastiche*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 3, 1996, pp. 119-147.

² A questo riguardo si vedano: G. Chiosso (ed.), *Scuola e stampa nell'Italia liberale. Giornali e riviste per l'educazione dall'Unità a fine secolo*, Brescia, La Scuola, 1993; Id. (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, Brescia, La Scuola, 1992. Si segnala inoltre M. Cattaneo, L. Pazzaglia (edd.), *Maestri, educazione popolare e società in «Scuola italiana moderna», 1893-1993*, Brescia, La Scuola, 1997.

³ De Fort, *I maestri di scuola*, cit., p. 184.

⁴ Cfr. A. Barausse, *L'Unione Magistrale Nazionale. Dalle origini al fascismo, 1901-1925*, Brescia, La Scuola, 2002; L. Pazzaglia, *L'associazionismo magistrale: le iniziative della «Nicolo Tommaseo»*, in Id. (ed.), *Cattolici, scuola e trasformazioni socioculturali in Italia tra Otto e Novecento*, Brescia, La Scuola, 1999.

⁵ Barausse, *L'Unione Magistrale Nazionale*, cit., p. 8. Ma si vedano in particolare: C. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento. Il contributo di Maria Magnocavallo (1869-1956)*, Brescia, La Scuola, 2005; Ead., *Maestri e istruzione popolare a Milano negli anni della prima guerra mondiale*, «History of Education & Children's Literature», vol. 2, n. 1, 2007, pp. 143-172; Ead., *Il Comune di Milano e l'istruzione dei giovani lavoratori. Le civiche scuole serali e festive superiori fra Unità ed età giolittiana*, «History of Education & Children's Literature», vol. 4, n. 2, 2009, pp. 197-224.

Inserendosi proprio in questa lacuna il presente lavoro vuole, quindi, fare luce sull'esperienza specifica di un'importante associazione magistrale sorta a Milano nel 1893: la Sezione Maestre e Maestri della locale Camera del Lavoro.

Attraverso la lettura dello statuto costitutivo del 1893 e la pubblicazione dei verbali delle sedute tenute dalla Sezione negli anni di attività che vanno dal 1894 al 1898, infatti, si vogliono ricostruire i primi anni di vita dell'associazione del capoluogo lombardo tracciando un quadro non solo delle sue attività, ma dei dibattiti interni, delle fratture e ricomposizioni delle varie parti che lo componevano, delle difficoltà che dovettero essere affrontate. Emergono, preponderanti, le figure di alcuni dei maestri e maestre che facevano parte della Sezione e che seppero darne quasi un 'volto' influenzandone le linee guida e la condotta. La Sezione, relativamente piccola nel numero di soci se confrontata con altre associazioni aderenti alla Camera del Lavoro in quegli stessi anni, fu nonostante ciò molto attiva non solo localmente, ma anche sul piano nazionale. Uno dei limiti delle sezioni magistrali di fine Ottocento era, infatti, l'eccessiva connotazione mutualistica e localistica⁶; di questo limite, come si vedrà successivamente, la Sezione milanese sembra essere ben consapevole, tant'è che si impegnò sempre nella promozione di convegni e partecipazione a congressi il cui scopo era cercare di avvicinare e riunire la classe magistrale per promuoverne le rivendicazioni e le attese⁷. Un avvicinamento che non sarà, però, di facile attuazione sia per le divisioni interne tra maestri stessi (le più evidenti delle quali erano quelle tra maestri 'di città' e maestri 'di campagna' e tra insegnanti di scuole elementari e superiori) che per il clima socio-politico che vi era in quegli anni in Italia e che alla nascita del Partito Socialista contrapponeva la spinta reazionaria dei governi Crispi, Di Rudinì e Pelloux.

1. *La Camera del Lavoro di Milano*

La città di Milano di fine Ottocento fu una delle prime città in Italia in cui si iniziò ad assistere al passaggio verso un sistema di fabbrica il quale, modificando radicalmente il volto della città⁸, portò sempre più all'affermazione di un nuovo

⁶ Cfr. Barausse, *L'Unione Magistrale Nazionale*, p. 9.

⁷ Sulla scarsa tutela giuridica ed economica della classe magistrale si vedano: G. Vigo, *Il maestro elementare italiano nell'Ottocento. Condizioni economiche e status sociale*, «Nuova Rivista Storica», n. 1-2, 1997, pp. 43-84; C. Ghizzoni, *Essere maestri in Italia fra Otto e Novecento*, *ibid.*, pp. 454-491.

⁸ Le analisi storiche, sociali ed economiche dello sviluppo industriale milanese sono numerose: qui si consigliano R. Romano (ed.), *Lavoro e società nella Milano del Novecento*, Milano, Franco Angeli, 2006; G. Luzzatto, *L'evoluzione economica della Lombardia dal 1860 al 1922*, in *La Cassa di Risparmio delle Province Lombarde nell'evoluzione economica della regione*, Milano, Cariplo, 1923, pp. 449-526; A. Saporì, *L'economia milanese dal 1860 al 1915*, in *Storia di Milano*, Vol. XV, Milano, Fondazione Treccani degli Alfieri per la storia di Milano, 1962, pp. 865-

soggetto sociale: la classe operaia. La progressiva presa di coscienza degli operai della propria importanza lavorativa e sociale insieme con la sempre più pressante necessità di veder riconosciuti i propri diritti e migliorate le proprie condizioni lavorative fecero sì che già a partire dal 1888 si iniziasse a progettare, nel capoluogo lombardo, la nascita di una Borsa del Lavoro, sul modello delle francesi *Bourses de travail*⁹, allo scopo di «liberare i lavoratori [...] dai vessatori condizionamenti dei sensali e dei mediatori»¹⁰. Gli iniziali scontri tra socialisti, operaisti e radicali frenarono, senza però bloccarlo, il progetto di creazione della borsa del lavoro i cui lavori furono affidati ad una apposita commissione denominata Comitato di studio e propaganda fra le società operaie aderenti¹¹. Nel febbraio-marzo 1890 tale Comitato pubblicò un opuscolo in cui per la prima volta fece la sua comparsa il termine «Camera del Lavoro»¹², presentata come un'istituzione al servizio dell'intera classe operaia e non solo dei suoi affiliati; sempre per opera del Comitato, inoltre, il 30 marzo 1890 fu indetta un'adunanza pubblica presso il Teatro della Canobbiana in cui, dinanzi a un pubblico di quasi cinquecento persone la maggior parte delle quali operai, fu infine decretata la costituzione della Camera del Lavoro di Milano¹³.

936; S. Zaninelli, *La Lombardia verso l'industrializzazione: dalla crisi agraria al primo conflitto mondiale*, in G. Are (ed.), *Storia dell'industria italiana*, Milano, Etas Libri, 1977, pp. 62-101; G. Fiocca (ed.), *Borghesi e imprenditori a Milano dall'unità alla prima guerra mondiale*, Roma-Bari, Laterza, 1984; A. Colli, *Cent'anni di «grandi imprese» lombarde*, in D. Bigazzi, M. Meriggi (edd.), *Storia d'Italia. Le regioni dall'Unità a oggi. La Lombardia*, Torino, Einaudi, 2001, pp. 478-529. Per un approfondimento sociologico dello sviluppo urbano milanese si consiglia, infine, S. Vicari Haddock, *La città contemporanea*, Bologna, il Mulino, 2004, pp. 49-52.

⁹ Le *bourses de travail* erano associazioni assistenziali a carattere locale la cui funzione consisteva prevalentemente nella promozione dell'incontro tra domanda e offerta di lavoro e nella vigilanza sulla corretta applicazione della normativa a tutela dei prestatori d'opera. Per approfondimenti: G. Molinari, *Les Bourses du travail*, Paris, Librairie Guillaumin et C.ie, 1893; F. Pelloutier, *Histoire des Bourses du travail: origine, institutions, avenir*, Paris, A. Costes, 1946; P. Schöttler, *Die Entstehung der "Bourses du Travail". Sozialpolitik und französischer Syndikalismus am Ende des 19. Jahrhunderts*, Frankfurt, 1982; trad. fr. *Naissance des Bourses du travail: un appareil idéologique d'Etat a la fin du 19. siècle*, Paris, Puf, 1985.

¹⁰ F. Della Peruta, *Milano. Lavoro e fabbrica, 1815-1914*, Milano, Franco Angeli, 1987, p. 155.

¹¹ Il Comitato di studio fu costituito nel dicembre 1889 da 15 membri provenienti dalle associazioni che avevano sostenuto il progetto camerale (quali Consolato operaio, Fascio dei lavoratori, Associazione fra i tipografi operai più altre associazioni minori) con il compito di propagandare l'idea della Borsa del lavoro presso le classi operaie e di studiare un progetto per la sua concreta attuazione: cfr. M. Antonioli, J. Torre Santos, *Riformisti e rivoluzionari. La Camera del lavoro di Milano dalle origini alla Grande guerra*, Milano, Franco Angeli, 2006, pp. 7-40.

¹² Cfr. Comitato di studio e propaganda fra le società operaie aderenti, *La Borsa del lavoro in Milano. Suoi scopi, benefici e modo di funzionare*, Milano, Tipografia degli Operai, 1890.

¹³ Gli studi sulla Camera del Lavoro di Milano sono ormai numerosi e in grado di far ben emergere le vicende storiche della sua costituzione e attività nel corso degli anni. In particolare si segnala la collana intitolata "Storia della Camera del Lavoro di Milano" edita dalla casa editrice Franco Angeli. Per una storia della Camera dalle origini fino a inizi Novecento si vedano: Antonioli, Torre Santos, *Riformisti e rivoluzionari*, cit.; M. Bonaccini, R. Casero, *La Camera del Lavoro di Milano dalle origini al 1904*, Milano, Sugarco, 1975; Comune di Milano, *Milano e la*

La presenza di diverse associazioni all'interno del progetto di costituzione della Camera, però, portò subito in evidenza la prima criticità: la sottolineatura, infatti, del carattere esclusivamente operaio della Camera stessa da parte del Comitato faceva sì che alcune associazioni pure aderenti ma che non erano totalmente operaie (tra cui l'importante Associazione generale degli operai, vicina all'ambiente radicale) mettessero in dubbio la propria partecipazione al progetto stesso. Proprio su questo punto nel corso del dibattito emerse lo scontro tra la posizione socialista in base alla quale gli operai dovevano organizzarsi all'interno della Camera tramite delle Sezioni uniche distinte per arti e mestieri e quella radicale contraria a tale soluzione¹⁴. A ciò si affiancò il problema della difficile approvazione della Camera da parte della Giunta municipale di Milano il cui regolamento non permetteva che all'interno di una stessa associazione potessero convivere più «società della stessa arte»¹⁵. Tutto ciò portò, quindi, a una temporanea sospensione del progetto di costituzione della Camera; quando l'8 ottobre 1890 il Comitato promotore indisse una nuova adunanza per discutere della fondazione della Camera, delle iniziali settantatré associazioni aderenti al progetto se ne presentarono solo trentuno, evidenziando la netta diserzione delle associazioni radicali. Ottenuta dal Comune la promessa di un finanziamento annuo di quindicimila lire, si aprì un dibattito sulla possibile imposizione ai soci di una quota annua: ciò era, evidentemente, in contrasto con l'iniziale progetto di creazione della Camera il quale ne prospettava un impegno volto a tutti i lavoratori e non solo agli associati e portò al fallimento dell'assemblea stessa¹⁶.

La ripresa del progetto di costituzione della Camera del Lavoro ebbe luogo a partire dall'adunanza del 31 gennaio 1891: si approvò il principio in base al quale i soci erano tenuti al versamento di una quota annuale per sostenere le spese della Camera mentre, per ciò che concerneva l'adesione di società esclusivamente operaie, si risolse la questione facendo un distinguo tra amministrazione e rappresentanza e fissando solo quest'ultima di esclusiva spettanza della classe operaia¹⁷.

Risolte ormai le questioni più impellenti, la Camera del Lavoro poté proseguire senza ulteriori intoppi nel suo lavoro di costituzione; il Comune di Milano, oltre al contributo monetario annuo, concesse anche l'uso di un'ala del Castello Sforzesco per dotare la Camera di locali per le adunanze delle varie

Camera del lavoro. 1891-1914, Milano, s.e., 1983; I. Granata, A. Scalpelli (edd.), *Alle radici della democrazia: Camera del lavoro e Partito socialista nella Milano di fine Ottocento*, Roma, Ediesse, 1998. Sul ruolo delle donne nella Camera F. Imprenti, *Operaie e socialismo: Milano, le leghe femminili, la Camera del lavoro (1891-1918)*, Milano, Franco Angeli, 2007.

¹⁴ Cfr. Antonioli, Torre Santos, *Riformisti e rivoluzionari*, cit., p. 22.

¹⁵ *La Camera del lavoro*, «Il Secolo», 1-2 aprile 1890, p. 1.

¹⁶ Cfr. Antonioli, Torre Santos, *Riformisti e rivoluzionari*, cit., pp. 26-32.

¹⁷ Cfr. *L'adunanza operaia di ieri sera per la Camera del lavoro*, «La Lombardia», 1 febbraio 1891, p. 1.

associazioni aderenti¹⁸ e nei quali la Camera si insediò stabilmente a partire dal 29 settembre 1891¹⁹. Delle società rappresentate nella Camera solo in ventitré ottennero l'assegnazione di un proprio spazio: molte altre società ne rimasero, infatti, prive; se ciò può essere imputato principalmente alla mancanza di un numero adeguato di locali, ha anche come altro motivo il fatto che altre associazioni erano in attesa dell'approvazione del proprio statuto per entrare a far parte ufficialmente della Camera del Lavoro di Milano²⁰. Tra esse può annoverarsi anche la Sezione Maestre e Maestri.

2. *La costituzione della Sezione Maestre e Maestri della Camera del Lavoro di Milano*

La Sezione Maestre e Maestri della Camera del Lavoro di Milano prese ufficialmente l'avvio a partire dal 2 marzo 1893. Già dalle righe iniziali dello Statuto della nascente organizzazione si evince chiaramente la vocazione operaia e socialista della Sezione stessa, sebbene venga con forza ribadito il principio dell'apoliticità e laicità della Camera e delle associazioni che la compongono²¹:

I maestri, per la maggior parte figli di lavoratori, lavoratori essi stessi, destinati ad educare ed istruire i futuri lavoratori, hanno il dovere di far causa comune colla grande famiglia degli operai. Ed è oramai tempo che cada quel baluardo, mantenuto nella Società da una grottesca aristocrazia, da un'ingiusta diffidenza, che ha tenuto finora diviso chi lavora colla mente da chi lavora col braccio. Sul campo del lavoro, di questa nuova potenza, migliore d'ogni altra, noi dobbiamo sentirci fratelli: l'unione delle due forze: l'intellettiva e la manuale, raggiunge e fa completo uno dei più fecondi e robusti principii della modernità. Ché, se noi volessimo

¹⁸ Cfr. *La Camera del lavoro*, «Il Secolo», 5-6 febbraio 1891, p. 1 e *Per la Camera del Lavoro*, «La Lombardia», 6 febbraio 1891, p. 1. Per una descrizione fisica delle sale e degli ambienti, la prima di una Camera del Lavoro in Italia, si veda anche *La Camera del lavoro*, «Il Secolo», 26-27 settembre 1891, p. 1. Il 19 agosto 1894 la sede venne spostata in Via del Crocefisso n. 15-17 dotando la Camera di uno stabile più ampio e in grado di ospitare un maggior numero di associazioni e di soci. Cfr. *L'inaugurazione della nuova sede della Camera del lavoro*, «Il Secolo», 15-16 agosto 1894, p. 1.

¹⁹ Cfr. Antonioli, Torre Santos, *Riformisti e rivoluzionari*, cit., p. 38.

²⁰ Cfr. Bonaccini, Casero, *La Camera del Lavoro di Milano dalle origini al 1904*, cit., pp. 51-53. Per le due autrici sarebbero state circa quaranta le società in tale situazione, ma Antonioli e Torre Santos contestano tale cifra giudicandola eccessiva (Antonioli, Torre Santos, *Riformisti e rivoluzionari*, cit., p. 40, nota).

²¹ In base all'articolo 3 dello Statuto della Camera del Lavoro, infatti: «Non si potrà assolutamente tenere nella Camera del Lavoro alcuna riunione avente carattere politico o religioso essendo la Camera del Lavoro affatto estranea, e tale dovendo rimanere, alle suddette questioni» in 'Archivio della Fondazione Giangiacomo Feltrinelli di Milano', Fondo Luigi Musini, fasc. Sezioni magistrali della Camera del Lavoro (1893-1909) (da qui in poi AFGF, LM, SMCL), *Statuto della Sezione maestre e maestri della Camera del lavoro di Milano*, 2 marzo 1893.

trovare tra gli operai e i maestri una differenza, pensiamo che v'ha soltanto questa: noi abbiamo assunti, coll'istruzione, maggiori e più seri doveri dei loro²².

Compito primario della Sezione era, quindi, l'educazione dei figli della classe operaia, un dovere cui tutti i maestri avrebbero dovuto sentirsi chiamati per concorrere all'opera di rinascita sociale, politica, morale ed economica della società e della Nazione e per abbattere pregiudizi, ignoranza, miseria e ingiustizia. I primi soci aderenti alla Sezione furono trenta²³: Francesco Anelli, Umberto Biraghi, Aristide Canevaro, Eugenio Celsi, Carlotta Clerici²⁴, Luigi Craici, Teresa Crivelli, Enrico Croce, Augusta Cuniberti, Giovanna De Murmann, Luigi Ferrario, Carlo Formigoni, Luigi Grassi, Giovanni Griffini, Camilla Locatelli, Linda Malnati²⁵,

²² *Ibid.*

²³ I fondatori iniziali furono dodici, ma già alla firma dello Statuto i soci aderenti avevano raggiunto il numero di trenta. Tre mesi dopo la firma dello statuto i soci erano arrivati a quota cento iscritti. Per questi dati si veda: *Maestri e Maestre alla Camera del Lavoro*, «Figli del Popolo», numero unico, 4 giugno 1893, p. 1.

²⁴ Carlotta Clerici (1851-1924) fu maestra e socialista. Si iscrisse nel 1892 al Partito Socialista e al suo interno vi fondò, cinque anni dopo, il movimento femminile socialista insieme con Anna Kuliscioff e all'inseparabile compagna Linda Malnati. Impegnata nei problemi specificatamente femminili e nella richiesta del suffragio, fu espulsa insieme con la Malnati dal PSI nel 1913. Poco dopo fondò, con altre compagne, l'Unione femminile socialista la quale si schierò apertamente contro l'ingresso italiano nel conflitto mondiale. Grazie a questa presa di posizione, nel 1918 guidò il comitato de *L'Avanti*, risolvendo le sorti del giornale. Difese strenuamente fino alla vecchiaia l'idea per cui fosse ormai tempo per il PSI di accogliere e sostenere le istanze delle donne lavoratrici e propose la creazione di un Segretariato Femminile socialista che svolgesse opera di propaganda presso le donne e ne favorisse l'ingresso nelle organizzazioni socialiste. Per approfondimenti sulla sua figura: R. Farina (ed.), *Dizionario biografico delle donne lombarde: 568-1968*, Milano, Baldini & Castoldi, 1995, pp. 314-315; Archivio Centrale dello Stato, Casellario Politico Centrale (da qui in poi ACS, CPC), b. 1379, *Clerici Carlotta*.

²⁵ Linda Malnati (1855-1921) fu maestra elementare e importante esponente socialista. Convinta dell'importanza di istruire i giovani, in particolar modo le ragazze, per promuovere la rigenerazione della società, per lei l'insegnamento fu una missione e una passione. Altrettanto importante fu per la Malnati la lotta per il miglioramento delle condizioni lavorative delle maestre italiane attraverso lo strumento dell'associazionismo: per tale motivo fondò a Milano nel 1890, insieme ad Anna Kuliscioff e Carlotta Clerici, la sezione femminile alla Camera del Lavoro, mentre nel 1893 fu fra i dodici promotori della Sezione Maestre e Maestri e tra i fondatori della Lega per la tutela degli interessi femminili (per approfondimenti sulla Lega v. nota 130). Alternò all'attività politica anche quella di autrice di testi scolastici, pubblicista e conferenziera. Nel 1903, insieme con la maestra Riva fondò il Comitato per il risveglio dell'attività femminile (sul tema v. nota 118) e, nonostante la delusione per l'indifferenza mostrata dal Partito Socialista sul tema del diritto di voto alle donne, continuò a operare all'interno del partito in favore della propaganda verso le lavoratrici, mantenendo aperto il dialogo con le componenti moderate e cattoliche del femminismo milanese. Apertamente pacifista durante il primo conflitto mondiale, fondò con la Clerici il Comitato pro-umanità per promuovere la neutralità italiana al conflitto. Tra i suoi scritti conviene ricordare: *Cento letterine ad uso delle classi elementari* (1886); *La refezione scolastica* (1901) e *Per l'Università popolare. Agli operai iscritti alla Camera del lavoro* (1901). Per notizie su Linda Malnati si rimanda a: ACS, CPC, b. 2961, *Malnati Linda*; E. Scaramuzza, *Malnati Linda*, in *Dizionario Biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, vol. 68, 2007, pp. 243-246. All'importante figura della maestra socialista può essere contrapposta l'altrettanto importante figura, in ambito cattolico, della maestra Maria Magnocavallo (1869-1956) la quale

Livia Mantovani, Vittorio Emanuele Mariani²⁶, Luigi Melli, Aquilino Moro, Oriele Ottolini-Beolchi, Giovanni Piazza, Giuseppe Pizzen, Alfredo Riboni, Francesco Robbiani, Isabella Somasca, Pirro Tornaghi, Enrico Tovaglieri e Giovan Battista Zanoletti. Com'è possibile evincere dai verbali di seguito pubblicati, la maggior parte di questi soci fu molto attiva all'interno della Sezione ed è possibile rilevarne una presenza assidua e partecipativa a riunioni e iniziative, indice di come questi maestri e maestre avvertissero fortemente l'importanza del proprio ruolo educativo delle masse operaie.

Lo Statuto della Sezione era composto da tredici articoli elencanti gli obiettivi dell'associazione e i mezzi per il raggiungimento degli stessi, oltre che la composizione della Sezione stessa.

In base allo Statuto i soci erano divisi in «effettivi», ossia i maestri che esercitavano il proprio mestiere a Milano, e «corrispondenti», intendendo così i maestri di provincia²⁷. A tutti i soci spettava il versamento di una quota

fu fra le promotrici, nel 1905, della Lega Magistrale Milanese, uno dei nuclei costitutivi della «Nicolò Tommaseo» (di cui fu presidente dal 1928 al 1930). Su quest'altra importante figura dell'associazionismo magistrale femminile milanese si veda ora Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento*, cit.

²⁶ Vittorio Emanuele Mariani (1859-1939) fu maestro e direttore scolastico milanese. Sebbene sia stato un esponente di spicco non solo all'interno della Sezione Maestre e Maestri milanese, ma anche a livello nazionale con la nomina a consigliere, nel 1901, nel Consiglio direttivo dell'Unione Magistrale Nazionale, manca a tutt'oggi una scheda biografica completa sulla sua figura. Si riportano qui le notizie su di lui conservate presso il Casellario Politico Centrale: «È uno degli elementi più istruiti e cauti, e quindi più temibile del partito socialista. Fu tra gli organizzatori del Circolo Operaio Milanese, istituzione del Consolato, dal quale più tardi si distaccò per assumere un indirizzo schiettamente socialista. Partecipò alla formazione del Circolo di Studi sociali sorto nel 1883 con identico fine di quello esistente nel 1877 e sciolto per decreto Prefettizio. Prese parte, per conto del Circolo Operaio, al Congresso della Confederazione Operaia in Brescia, dove fece prevalere i suoi concetti socialisti in ordini del giorno, che più accentuatamente si esplicarono nell'altro Congresso tenuto a Mantova nel Dicembre 1885 per iniziativa dal Partito Operaio Italiano, nelle cui assemblee fu anzi Presidente di turno. Aiutò poi il partito cogli scritti e col denaro e nel 1886 firmò La Rivendicazione d'onore del partito Operaio Italiano, contro gli attacchi dell'On. Cavallotti ed avvenuto poi lo scioglimento del partito, egli si incaricò di ricostituirlo. Un tempo si prestò a tenere nella abitazione riunioni degli affiliati e fu in corrispondenza col Circolo Giovanile Democratico di Alessandria ed in rapporti intimi col Comitato Centrale del Partito Operaio Italiano. Da qualche tempo si è però ritirato dalla politica d'azione e non frequenta quasi più le riunioni. Di buona condotta morale; segue la scuola di Carlo Marx». Ancora nel 1904 un'altra nota riportava: «a seguito della nota scissura verificatasi nel partito socialista, il Mariani si schierava fra gli intransigenti e [...] veniva nominato membro effettivo della Commissione esecutiva della Camera del Lavoro, composta interamente da elementi rivoluzionari [...] è convenientemente vigilato». Con il passare degli anni, però, Mariani, nominato nel frattempo direttore della scuola comunale di Via Borgognone a Milano, venne sempre più ritirandosi a vita privata tant'è che, nel 1929, la Regia Prefettura di Milano con atto del 26 aprile ne chiedeva la radiazione dallo schedario dei sovversivi motivando la richiesta con la constatazione che «conduce vita ritirata e si dimostra favorevole all'attuale Regime». Per approfondimenti: ACS, CPC, b. 3061, *Mariani Vittorio Emanuele*.

²⁷ AFGF, LM, SMCL, *Statuto della Sezione maestre e maestri della Camera del lavoro di Milano*, 2 marzo 1893 (artt. 5 e 6).

annuale alla Camera del Lavoro di cinquanta centesimi, cui andava poi aggiunta una quota per le spese particolari della Sezione Maestre e Maestri che era di cinquanta centesimi al mese per i soci effettivi e di una lira all'anno per i soci corrispondenti²⁸.

Ogni anno, nel mese di ottobre, l'assemblea dei soci della Sezione eleggeva un proprio Comitato Direttivo di cinque membri scelti fra i soci residenti a Milano il quale aveva compiti di rappresentanza e distribuzione delle mansioni²⁹.

Tra gli scopi che l'organizzazione si proponeva come ineludibili si ritrovano la difesa ed il miglioramento degli interessi morali ed economici della classe magistrale e la cooperazione di maestre e maestri con il movimento operaio. Per la difesa degli interessi degli insegnanti, la Sezione si proponeva di: impiegare letture, conferenze e congressi per dar modo ai soci di studiare e approfondire questioni didattiche, educative e sociali; tutelare i diritti della classe magistrale tramite stampa, voti collettivi, pratiche legali e voti collettivi; provvedere al collocamento dei colleghi disoccupati e aiutarli tramite aiuti morali ed economici; promuovere l'istituzione delle scuole popolari³⁰ e praticare la cooperazione³¹.

Per ciò che concerneva, invece, la collaborazione con le altre classi lavoratrici, la Sezione milanese si poneva in primo luogo il raggiungimento della rigorosa applicazione della legge sull'obbligatorietà scolastica unita con l'assoluta gratuità della scuola al fine di permettere a ogni fanciullo di concludere la scuola primaria; altri mezzi da impiegarsi erano poi la propaganda presso gli operai per promuoverne l'interesse verso le Scuole Comunali, renderli consapevoli dei propri doveri e diritti, farli partecipi dell'impegno del Comitato a favore dell'istituzione di scuole professionali e ricreatori laici festivi³².

Il primo Comitato nominato dalla Sezione fu composto dai soci Carlotta Clerici, Enrico Croce, Linda Malnati, Vittorio Emanuele Mariani e Aquilino Moro³³.

²⁸ *Ibid.* (art. 7).

²⁹ *Ibid.* (art. 8).

³⁰ Nell'originale in grassetto.

³¹ AFGF, LM, SMCL, *Statuto della Sezione maestre e maestri della Camera del lavoro di Milano*, 2 marzo 1893, art. 3.

³² *Ibid.* (art. 4).

³³ Nel 1894 il Comitato fu costituito da: Ambrogina Besana-Viglezzi, Carlotta Clerici, Luigi Ferrario, Carlo Formigoni, Vittorio Emanuele Mariani, Angelo Merlini e Silvia Rossi (cfr. AFGF, LM, SMCL, Verbali delle sedute dell'assemblea della Sezione maestre e maestri della Camera del Lavoro di Milano [I] (da qui in poi VS I), *Seduta del giorno 8 novembre*); nel 1895 ne erano membri: Vittorio Emanuele Mariani, Ambrogina Besana-Viglezzi, Giovanni Piazza, Guglielmo Maffi, Carlotta Clerici, Luigi Ferrario e Lora Vismara (in seguito dimissionaria e sostituita da Giulia Grancini). Cfr. AFGF, LM, SMCL, Verbali delle sedute dell'assemblea della Sezione maestre e maestri della Camera del Lavoro di Milano [II] (da qui in poi VS II), *Assemblea del 14 nov. 1895*. Nel 1896 furono, invece, eletti: Carlotta Clerici, Ambrogina Besana-Viglezzi, Giulia Grancini, Luigi Craici, Giovanni Griffini, Guglielmo Maffi (dimessosi poi per motivi di salute e sostituito da Luigi Ferrario) e Luigi Montalbetti (cfr. AFGF, LM, SMCL, Verbali delle sedute dell'assemblea della Sezione maestre e maestri della Camera del Lavoro di Milano [III] (da qui in

Pochi mesi dopo la nascita della Sezione, per meglio ribadire il principio fondativo esplicitato nella prima parte dello Statuto fondativo e far conoscere presso i soci della Camera, i colleghi maestri e gli operai in generale gli obiettivi, i programmi e le battaglie che la Sezione si poneva come basilari della propria azione, alcuni soci provvidero anche alla pubblicazione, il 4 giugno 1893, di un numero unico di quattro pagine intitolato «Figli del Popolo»³⁴. Sulla prima pagina del giornale era possibile, infatti, leggere:

Una nostra collega [il riferimento è a Linda Malnati] si fece un giorno questa domanda: «Perché i maestri non sono alla Camera del Lavoro?». Pochissimo tempo dopo, per iniziativa di quella collega, coadiuvata da pochi volenterosi, si riusciva, in una dozzina, a costituirvi una Sezione. A quella domanda non si poteva rispondere meglio. I soci promotori si erano detto: se è vero che le Camere del Lavoro hanno per iscopo principale di riunire in una grande famiglia tutti i lavoratori di una città, perché possano meglio provvedere ai loro interessi, forti di un'organizzazione intelligente e compatta, impedendo che vengano per tal modo conculcati i loro diritti, e mettendoli in grado di conquistarne dei nuovi; Se è vero che tendono a migliorare, oltre che le condizioni degli individui, anche gli individui stessi, istruendoli con lezioni, conferenze, insegnamenti pratici, forniti con tutti i mezzi più razionali e adatti per arrivare alla mente della massa lavoratrice; Se è vero che anche il maestro è un lavoratore salariato, che, cresciuto nel popolo, all'educazione ed istruzione di questi ha votata la sua vita; Se è vero tutto ciò, perché i maestri non devono entrare a far parte della Camera del Lavoro? Non devono entrare nella casa del popolo, che è destinata a diventare, col tempo, la rocca inespugnabile, dietro la quale si sentirà forte e sicuro chi lavora e produce?³⁵

Particolarmente significativo appare l'appello a raccolta di tutti i maestri d'Italia e l'invito a formare anch'essi delle Sezioni per meglio concorrere tutti insieme al raggiungimento degli obiettivi comuni:

Voi quindi, maestri tutti d'Italia, voi cui sono affidate le nuove generazioni,orgete! Un raggio di speranza brilli sulla vostra fronte; il ricordo dei soprusi patiti, il pensiero d'essere stati finora gli eterni dimenticati, l'attrattiva della nuova epopea, che la storia sta preparando, vi svegli, e venite, voi che tanto potete, ad aggiungere l'opera vostra a quella

poi VS III), *Assemblea del 22 ottobre 1896*). L'ultima elezione del Comitato, nel 1897, vide infine votati: Carlotta Clerici, Giulia Grancini, Lora Vismara, Luigi Ferrario, Guglielmo Maffi, Vittorio Emanuele Mariani e Luigi Montalbetti (cfr. *ibid.*, *Assemblea del 18 novembre 1897*). Fin da subito, come è possibile evincere dai verbali, il numero dei membri fu elevato da cinque a sette. Nella seduta del 18 novembre 1897 Vittorio Emanuele Mariani propose una modifica nella nomina del Comitato chiedendo che fossero eletti cinque membri del corpo insegnante milanese e due maestri di campagna (ma residenti a Milano). Dopo una breve discussione fu votata dall'assemblea la proposta di Luigi Ferrario secondo la quale, a partire dalla votazione dell'anno 1898, ai sette membri già votati dai soci sarebbero dovuti poi aggiungersi altri due membri rappresentativi dei soci corrispondenti (cfr. *ibid.*).

³⁴ Numero unico pubblicato a Milano proprio a opera della Sezione Maestre e Maestri e il cui ricavato era destinato al Ricreatorio laico annesso alla Camera del Lavoro (v. nota 128).

³⁵ *Maestri e Maestre alla Camera del Lavoro*, «Figli del Popolo», cit., p. 1. L'articolo è anonimo, ma un'indicazione a penna sul testo originale riporta il cognome "Moro", dando modo quindi di dedurre che molto probabilmente l'autore dell'articolo fu il socio Aquilino Moro.

degli altri fratelli. Che l'esempio dei colleghi di Milano possa incitare ancor voi a fare qualche cosa e per voi e per tutti. Nel saluto che i vostri colleghi della Sezione Milanese vi mandano dal cuore, sappiate scorgere un appello. In ogni città dove funziona una «Camera del Lavoro» piantate liberamente, coraggiosamente la vostra Sezione; non vi scorraggino gli ostacoli, l'indifferenza, l'apatia, la malignità. Solo in tal modo noi potremo stringere le file, far correre fra tutti i colleghi della penisola reciprocamente le nostre idee, ed accordarci sui mezzi più acconci al raggiungimento di quegli ideali che formeranno la poesia della nostra vita di oscuri e modesti lavoratori³⁶.

Come si è già rilevato, non sarà facile per le sezioni magistrali mettere in pratica un progetto di creazione di un organismo rappresentativo nazionale, ma l'appello milanese è comunque il segno di come tale esigenza fosse chiaramente avvertita dai maestri e maestre delle Sezione e di come fin dal loro atto costitutivo essi si proponessero di promuovere la collaborazione fra colleghi. Ne è un chiaro esempio la preponderante opera di propaganda operata fin dai suoi esordi dal Comitato anche al di fuori del capoluogo lombardo e che ben emerge dai verbali. In quello del 1° marzo 1894, ad esempio, si fa riferimento all'attività del Comitato per la promozione, nelle città in cui aveva sede la Camera del Lavoro, dell'istituzione delle Sezioni dei maestri:

[Il Comitato] è lieto di poter riferire che in parecchie città, come a Firenze, Parma, Cremona, Pavia [...] si sono già costituite o sono in via di costituzione [le sezioni maestri], modellandosi sul ns. Programma-Statuto; da altri siti ci arrivano domande di schiarimenti, consigli, ecc. Il Comitato continuerà nella sua iniziativa fino alla costituzione di una Federazione di tutti i Maestri aggregati alle Camere del Lavoro³⁷.

Ancora nel 1897, poi, su richiesta della locale Camera del Lavoro di Lodi, la Sezione inviò alcuni soci per aiutare nell'istituzione della sezione dei maestri del circondario³⁸.

Un altro tema importante che, come si è visto, emerse già nello Statuto ma che fu poi ripreso sulle pagine di «Figli del Popolo» fu quello del potenziamento a Milano delle scuole popolari. Con una lettera aperta al sindaco della città, infatti, si volle ribadire il concetto per cui al popolo spettasse il diritto di poter raggiungere un adeguato grado di educazione per meglio stimolare la voglia di lavorare e, quindi, migliorare le proprie condizioni economiche e sociali. Per meglio incentivare la formazione popolare, il Comune aveva il compito di promuovere la scuola:

Nell'educazione, la scuola, quantunque non sia nulla più d'un coefficiente, ebbe sempre un'influenza di gran momento; ma ora le venne ingrandita smisuratamente la propria responsabilità, e andrà tanto più ingigantendo, quanto più andranno imponendosi i quesiti sociali, che già influiscono su città e villaggi. Gli è perciò che la scuola, nel mentre diventava

³⁶ *Ibid.*

³⁷ AFGF, LM, SMCL, VS I, *Assemblea del 1° Marzo 1894*.

³⁸ AFGF, LM, SMCL, VS III, *Assemblea del 18 novembre 1897*.

(in questo scorcio del secolo XIX) l'emanazione di una scienza profondissima, è diventata eziandio l'istituto necessario a tutti, tanto più necessario, quanto ha maggior bisogno il povero lavoratore di rimediare ai contatti grossolani ed alle influenze della sua miseria pecuniaria e sociale, riparando in una interna vita mentale che sorregge la nobiltà di uomo e rifornisca valore morale. La scuola ha una somma immensa di doveri, una responsabilità squisitamente delicata, oggi che deve assecondare e guidar la rivoluzione, della quale assistiamo al preludio. La politica, la morale, l'educazione in famiglia, l'istruzione in case e fuori, la società, la donna, tutto accenna a rinnovellarsi in una fase che assai poco avrà di comune con la presente e colle antecedenti. Il passo dell'epoca attuale è gigantesco, sublime, ma difficile e terribile. Non può adempiere l'amministrazione comunale questi doveri d'ordine educativo, se trascura d'istituire scuole apposta, e di richiamar le sussistenti a quella dottrina ed a quella linea di condotta che sono designate dalla pedagogica e dalle peculiari condizioni sulla popolazione³⁹.

La Sezione aveva, però, ben chiari i problemi che affliggevano le scuole popolari milanesi e, in particolare, quello dell'alto tasso di abbandono da parte dei fanciulli e nel corso della sua attività, come si vedrà in seguito, propose una serie di misure cui il Comune avrebbe dovuto ricorrere per mettere un freno al dilagante fenomeno.

Scopo degli aderenti della Sezione era quindi, in primo luogo, illuminare l'alunno sulle sue capacità e sui suoi possibili sbocchi professionali, rendendolo infine in grado di «reggere la pubblica cosa insieme agli altri cittadini»⁴⁰ ossia renderlo un elettore⁴¹.

3. *L'attività della Sezione (1894-1898)*

La lettura dei verbali 1894-1898 permette di ricostruire con chiarezza tutta l'attività messa in campo dalla Sezione Maestre e Maestri nei suoi primi anni di vita e di far emergere il ruolo attivo ricoperto dall'organizzazione non solo all'interno della Camera del Lavoro, ma anche in seno all'Associazione Magistrale e, in generale, nella vita cittadina milanese.

Una delle prime questioni su cui i soci si trovarono a discutere nella riunione del 1° marzo 1894 fu, ad esempio, quella dell'imposizione da parte dell'ispettore

³⁹ *La scuola per il popolo (Lettera aperta al sindaco di Milano)*, «Figli del Popolo», cit., p. 1.

⁴⁰ *Ibid.*

⁴¹ All'epoca vigeva la legge elettorale 7 maggio 1882 n. 725 emanata dal governo Depretis e in base alla quale in Italia il diritto di voto era riservato a tutti i maschi di età superiore ai ventuno anni in grado di esibire la licenza del biennio elementare statale libero e gratuito stabilito dalla legge Coppino del 1877, indipendentemente dal reddito. In mancanza di questo requisito poteva comunque votare chi era in possesso di un reddito pari o superiore a 19,80 lire. Con questa legge il corpo elettorale raggiunse una proporzione del 7 per cento rispetto al totale della popolazione. La bibliografia in merito alla legge elettorale 1882 è amplissima. Qui si rimanda a S. Rodotà, *Libertà e diritti in Italia. Dall'Unità ai giorni nostri*, Roma, Donzelli, 1997, pp. 42-43.

scolastico Borghesio di una Circolare la quale dava indicazioni circa i programmi didattici degli insegnanti. Vista da più soci come un'ingerenza nel lavoro del maestro, oltre che come un atto illegale, tale circolare fu fortemente criticata e, con un ordine del giorno, respinta⁴².

Un'altra delle prime questioni su cui la Sezione si trovò a discutere nella stessa seduta fu, anche, quella dell'aumento degli stipendi ai maestri e della parità retributiva tra maestri e maestre. Fin dalla legge Casati del 1859, infatti, alle maestre spettava uno stipendio inferiore di un terzo rispetto a quello dei colleghi uomini. Dalle analisi fatte da Susanne Wilking nel suo studio sulle maestre elementari milanesi risulta che nel capoluogo lombardo a inizi Novecento la disparità contributiva tra uomini e donne delle varie categorie magistrali fosse pari a circa il 15%⁴³.

Dopo aver affrontato numerose discussioni sulla questione, la Sezione milanese, nell'assemblea del 25 febbraio 1897, votò infine un ordine del giorno con cui si chiedeva:

1. Aumento decoroso e sensibile degli stipendi iniziali, con particolare riguardo a quello delle maestre ed a quello dei maestri di seconda categoria. – L'aumento degli stipendi per le maestre sia tale d'avvicinarli il più possibile a quelli dei maestri. 2. Aumento decoroso e sensibile per tutte le categorie prima dei 10 e prima dei 15 anni di servizio. 3. I suddetti aumenti decorrano dal 1 Gennaio 1897. 4. Gli aumenti quinquennali decorrano dalla data della prima assunzione in servizio⁴⁴.

È interessante rilevare come, sebbene i soci dell'organizzazione non arrivassero a chiedere la parità retributiva tra insegnanti di sesso maschile e quelli di sesso femminile, si volle comunque promuovere il principio dell'aumento degli stipendi al corpo insegnante femminile tale da renderlo quasi allo stesso livello di quello dato agli uomini.

È importante sottolineare come sulla questione degli stipendi l'organizzazione lavorasse di comune accordo con l'Associazione Magistrale milanese⁴⁵.

⁴² AFGF, LM, SMCL, VS I, *Assemblea del 1° Marzo 1894* e AFGF, LM, SMCL, VS II, *Assemblea del 12 dicembre 1895*.

⁴³ S. Wilking, *Le maestre elementari a Milano e l'Associazione magistrale milanese dalla fine dell'Ottocento al 1914*, in A. Gigli Marchetti, N. Torcellan (edd.), *Donna lombarda 1860-1945*, Milano, Franco Angeli, 1992, p. 212.

⁴⁴ AFGF, LM, SMCL, VS III, *Assemblea del 25 febbraio 1897*.

⁴⁵ L'Associazione Magistrale Milanese (AMM) fu fondata nel settembre 1893. Aveva per scopo il miglioramento morale e materiale delle condizioni dei maestri elementari non mancando, però, di allargare l'ambito dei suoi compiti a questioni più propriamente politiche quali la promozione dell'incremento dell'istruzione pubblica; il tutto per mezzo di conferenze, discussioni, petizioni, congressi, assistenza, la pubblicazione di un «Bollettino dell'Associazione magistrale milanese» e la stampa dell'organo mensile «Vita magistrale». Sul ruolo delle maestre elementari milanesi e l'Associazione magistrale si rinvia a: Wilking, *Le maestre elementari a Milano e l'Associazione magistrale milanese dalla fine dell'Ottocento al 1914*, cit., pp. 200-224; C. Ghizzoni, *Maestre cattoliche e associazionismo magistrale a Milano in età giolittiana*, in S. Bartoloni (ed.), *Per le strade del mondo. Laiche e religiose fra Otto e Novecento*, Bologna, il Mulino, 2007, pp. 181-212.

Nell'analisi dell'azione svolta dalla Sezione tra il 1894 e il 1898 è necessario, infatti, fare un importante distinguo tra l'opera della Sezione stessa e quella dell'Associazione Magistrale: sebbene entrambe si trovassero spesso a lavorare insieme e di comune accordo, la Sezione volle sempre ribadire la propria indipendenza di principi e d'azione. Per cui, anche in questo caso, sebbene la Sezione deliberasse di lavorare insieme con la Magistrale per promuovere un'agitazione degli insegnanti allo scopo di ottenere degli aumenti paritari per maestri e maestre, il socio Ferrario non mancò di sottolineare come:

In quanto al lavoro da farsi in comunione colla Magistrale, egli è di parere contrario; crede che non possa né si debba stare assieme nel lavoro, poiché la linea di condotta e i principî delle due Associazioni sono molto diversi: quelli della Magistrale battono una strada, noi ne calchiamo un'altra: ognuno lavora per proprio conto⁴⁶.

Proprio sulla questione degli stipendi e della collaborazione con l'Associazione Magistrale, poche sedute dopo, si arrivò anche alla netta presa di posizione dei soci Pizzen e Malnati secondo i quali:

Pizzen crede che noi siamo [...] fuori di via, perocché vogliamo in pari tempo attendere a due scopi troppo diversi: quello del miglioramento economico come classe professionale e quello del trionfo dell'idea altruistica che ci ha condotti alla Camera del Lavoro. Vorrebbe che si limitasse l'opera nostra a ciò solo che ha attinenza con la quistione sociale, e abbandonassimo quanto riguarda esclusivamente il nostro interesse materiale all'altra associazione; tanto più che di questa, per la maggior parte, noi siamo soci e i più attivi ed influenti. [...] Malnati ritiene anch'essa che assolutamente sia necessario scindere il nostro lavoro da quello della Società Magistrale; e aggiunge inoltre: «Ritornassimo ancora ai 12 promotori è necessario star solo o qui, o là»⁴⁷.

Nonostante ciò, la Sezione partecipò sempre attivamente ai lavori dell'Associazione tramite propri soci e rappresentanti eletti all'interno della commissione della società magistrale.

Una di queste, ad esempio, fu la Commissione civica degli studi. Richiesta dal Soprintendente alla Camera del Lavoro per coadiuvarlo nel controllo dell'operato dei maestri, la Sezione fu invitata a parteciparvi con la nomina di due membri. Nel corso della discussione, però, emerse subito ciò che fu definito il «non senso»⁴⁸ della Commissione stessa: come potevano, infatti, i maestri ispezionare se stessi? Se, infatti, compito della Commissione era il controllo delle scuole sarebbe stato più opportuno che fosse composta da elementi tecnici e non, quindi, dal corpo insegnante. Dopo ampia discussione prevalse il principio per cui fosse da preferire una Commissione composta da maestri in quanto sarebbero stati gli unici in grado di operare in modo equo e rispettoso

⁴⁶ AFGF, LM, SMCL, VS I, *Assemblea del 1° Marzo 1894*.

⁴⁷ *Ibid.*, *Assemblea del 9 gennaio 1895*.

⁴⁸ AFGF, LM, SMCL, VS II, *Assemblea del 7 febbraio 1895*.

verso i propri colleghi portando vantaggio a tutta la classe insegnante. A questo proposito si presentò anche un ordine del giorno in base al quale:

L'Assemblea della Sezione Maestre e Maestri della Camera del Lavoro, invitata a scegliere i propri candidati p. la Comm.ne civica per gli studi, da rinnovarsi nel nuovo Consiglio Comunale, premette: che la sudd.ta Commissione dovrebbe essere così costituita da riuscir idonea a giudicare e far progredire le scuole comunali, cioè le istituzioni che essa soprintende; epperò continuerà ad essere, come lo fu sempre, un non senso, finchè non saranno i suoi membri, in maggioranza, maestri insegnanti nelle scuole civiche, e specialmente nelle elementari, perché queste ultime sommano a 100 su un totale di 106⁴⁹.

Risolta così la questione, si aprì subito un altro dibattito in merito al sesso delle persone da presentare per la candidatura: il regolamento della Commissione stessa, infatti, la voleva formata da padri di famiglia, escludendo così donne nubili e uomini celibi. La giustificazione stava nel fatto che gli sposati fossero più attenti ai bisogni e alle esigenze dei bambini. La richiesta venne, però, rigettata a maggioranza dall'assemblea che, infine, propose come propria candidata la socia Carlotta Clerici⁵⁰.

Fortemente sentiti erano, poi, i temi riguardanti le scuole serali e festive e gli annessi problemi dell'abbandono scolastico, degli esami finali, delle classi separate, della refezione scolastica.

Proprio sul tema dell'abbandono scolastico, la Sezione si era già duramente espressa nella lettera aperta al sindaco e pubblicata su «Figli del Popolo», sottolineando l'incapacità educativa della scuola la quale portava, così, molti fanciulli ad abbandonare gli studi:

Una grave inettitudine si riscontra nelle scuole primarie (e nelle medie), avvezze alla forma aprioristica d'un insegnamento privo d'indirizzo dimostrativo ai sensi; e però gli alunni, plasmati alla disciplina del silenzio e dall'obbedienza, son disposti a mandar a memoria tutto ciò che non comprendono, ma per compenso, non sono punto inclinati ad indagare il senso; e, conseguenza fatale, essi non sono in grado di giudicare dalle proprie azioni. Se non che un contingente caratteristico deserta la scuola, disilluso e sfiduciato, e sono i molti poverelli che speravano di trovar nella scuola un instradamento alla vita effettiva, un'intelligente preparazione alla bottega, all'officina, e la coltura e le abitudini mentali che avviano al commercio intellettuale e morale cogli altri elementi della cittadinanza. Le famiglie speravano di veder dalla scuola incoraggiati i fanciulli a sostener dignitosi il retaggio della paterna povertà, e apprendere le vie di migliorar il proprio stato economico senza colpevoli rinnegamenti e superbe diserzioni. Ma, vedendo come la scuola non offra ai loro figli altro pascolo che del vento, e si mostri ignorante (o indifferente) di loro bisogni speciali, disdegnosa dei loro cenci, questi babbi ascoltano la preghiera degli avviliti scolaretti, e loro accordano il permesso di dedicarsi, innanzi tempo, al succhiello e alla lesina. O sgomentandosi dell'indirizzo falso e vanitoso che nella scuola vanno assorbendo i loro fanciulli, queste

⁴⁹ *Ibid.*

⁵⁰ *Ibid.* La candidatura della Clerici fu, però, rifiutata dall'Associazione Magistrale che la sostituì con l'insegnante Adele Riva (si veda a proposito *ibid.*, *Assemblea del 14 novembre 1895*).

famiglie di braccianti si affrettano a strappare di mano al figlio i libri sciagurati che di nenie ingannevoli ne andan riempiendo la mente troppo avida e fiduciosa⁵¹.

Per porre un freno al problema, Vittorio Emanuele Mariani propose l'adozione delle seguenti misure⁵²: impedimento dell'iscrizione agli anni successivi per coloro i quali non avessero concluso il precedente anno scolastico o avessero un tale numero di assenze da rendere inefficace il lavoro fatto durante l'anno scolastico; obbligo per gli insegnanti di prendere informazioni sugli alunni che si fossero assentati per più di tre giorni consecutivi; obbligo per i genitori di recarsi dall'insegnante per avere informazioni sulle assenze del figlio almeno una volta al mese; in caso di inadempienza ai propri doveri da parte dei parenti o del datore di lavoro⁵³ del fanciullo, obbligo per il Dirigente scolastico di deferire gli stesso presso l'Autorità Municipale; divisione, nelle scuole con più classi parallele, degli alunni per capacità ed età facendo più numerose le classi con alunni meno avviati allo studio; obbligo di rilascio a ciascuno studente non promosso di un attestato di frequenza; eliminazione degli esami orali di fine anno; fornitura anche agli alunni indigenti delle classi quarta e quinta elementare, da parte del Comune, di libri di testo gratuiti; obbligo di versamento da parte degli iscritti di una quota che la Direzione avrebbe poi restituito a fine anno⁵⁴ tranne che a quegli studenti che avesse accumulato sui giorni di scuola 1/5 di assenze e non si fossero presentati agli esami trimestrali e finali⁵⁵. La proposta incontrò, però l'opposizione di molti soci in quanto si

⁵¹ *La scuola per il popolo (Lettera aperta al sindaco di Milano)*, «Figli del Popolo», cit., p. 1.

⁵² AFGF, LM, SMCL, VS I, *Adunanza del 7 giugno*.

⁵³ Il quale dava per iscritto il proprio consenso affinché il giovane lavoratore potesse frequentare la scuola.

⁵⁴ AFGF, LM, SMCL, VS I, *Adunanza del 7 giugno*. In particolare era previsto un deposito (pagabile nel primo mese scolastico in quattro rate settimanali) di due lire per gli studenti delle prime tre classi elementari, di tre lire per gli appartenenti alla quarta classe e di 4 lire per gli iscritti alla quinta. È interessante notare come lo stesso provvedimento, in riguardo però alle scuole serali e festive superiori, fosse successivamente adottato dalla stessa Giunta municipale milanese proprio per contrastare il fenomeno dell'abbandono scolastico. Come riportato, infatti, da Carla Ghizzoni: «nella seduta del 20 maggio 1896, la Giunta, sentita la Commissione degli studi, proponeva al Consiglio comunale di istituire una modica tassa di iscrizione, con possibilità di esonero degli indigenti. Questa proposta era avanzata anche in considerazione del fatto che le Serali e le Festive Superiori rappresentavano una spesa non obbligatoria, ma facoltativa a carico del comune. [...] L'introduzione di una tassa, inoltre, avrebbe stimolato la scolaresca a attribuire il giusto valore ad un bene, quello dell'istruzione, che il Comune metteva a disposizione di tutti i suoi cittadini. Proprio con l'intento di motivare gli studenti delle Serali e Festive Superiori a seguire con costanza le lezioni, il Consiglio comunale corresse la delibera della Giunta, prevedendo che la tassa fosse restituita a chi frequentava regolarmente e superava gli esami» (Ghizzoni, *Il Comune di Milano e l'istruzione dei giovani lavoratori*, cit., p. 209).

⁵⁵ Nel verbale si specifica, comunque, che tale somma sarebbe stata invece restituita a chi avesse lasciato la scuola per malattia o motivi imprescindibili e provati. Le somme non restituite sarebbero dovute essere devolute, secondo il progetto Mariani, per l'acquisto di libri agli studenti poveri.

giudicarono eccessive le misure di controllo proposte e la discussione venne, così, accantonata⁵⁶.

Nelle proposte fatte da Mariani nella sua relazione all'assemblea del 7 giugno 1894 emergono altri due temi ampiamente dibattuti nelle altre sedute della Sezione: la divisione degli alunni nelle classi e l'eliminazione degli esami orali di fine anno.

Sul primo punto una proposta, avanzata da Carlo Mor, consisteva nella creazione di classi con cui operare una selezione degli alunni in base alle capacità intellettive. Per sostenere la fondatezza della sua proposta lo stesso Mor illustrò subito le obiezioni che tale progetto poteva sollevare: in primo luogo si sarebbe potuto contestare come la selezione non fosse un provvedimento da potersi estendere alla generalità delle scuole, poiché era attuabile solo nei grandi centri in cui era possibile costituire più classi parallele; la selezione, inoltre, poteva offendere la suscettibilità di quei genitori i cui figli sarebbero stati assegnati alla classe «dei deficienti»; infine, la selezione avrebbe privato la scuola di un importante strumento di educazione del fanciullo quale quello dell'emulazione⁵⁷.

Tutte le obiezioni furono, però, confutate. Mariani, favorevole al progetto Mor, fece infatti presente come la misura della selezione non avrebbe potuto offendere la suscettibilità dei genitori una volta che si fosse compreso come la stessa fosse attuata per il bene stesso degli scolari. Inoltre la stessa emulazione, per lo stato stesso della scuola in quel momento, era già difficilmente attuabile nelle classi, troppo ampie e variegate. La sua proposta fu, quindi, quella di stabilire per ogni classe il numero massimo di elementi validi e un altrettanto numero di elementi minorati. Ma nella stessa Sezione non tutti si mostrarono altrettanto favorevoli: a chi contestava come questa selezione intellettuale potesse facilmente trasformarsi in selezione sociale «poiché i migliori sono di solito i più agiati, cioè quelli che, oltre al cibo più nutriente, sono anche i meglio assistiti a casa»⁵⁸, si univa anche chi sosteneva come il vero problema nelle scuole non fosse la presenza «dei deficienti», ma la mancanza di maestri fissi per ogni classe⁵⁹. Particolarmente critico si rivelò essere Giovanni Piazza il quale affermò che l'approvazione della proposta Mor sarebbe equivalsa alla implicita approvazione del sistema scolastico vigente in quel momento e che invece si voleva riformare dalle fondamenta⁶⁰.

Alla fine della discussione si decise, comunque, l'approvazione di un ordine del giorno in base al quale la presenza di diseguaglianze intellettive tra studenti

⁵⁶ AFGF, LM, SMCL, VS I, *Adunanza del 7 giugno*.

⁵⁷ *Ibid.*, *Assemblea del giorno 12 aprile*.

⁵⁸ *Ibid.* La critica, in particolare, fu mossa dal socio Guglielmo Maffi, ma fu sostenuta anche da Enrico Croce secondo il quale la causa principale delle deficienze intellettive fossero le cattive condizioni economiche delle famiglie e che si dovesse, quindi, agire di più sul piano sociale.

⁵⁹ *Ibid.* Tale appunto fu, invece, fatto da Umberto Biraghi.

⁶⁰ *Ibid.*

era vista come causa di scarso profitto dell'insegnamento e portatore di un elevato tasso di bocciatura; si chiedeva pertanto alla soprintendenza scolastica la formazione in via sperimentale di alcune classi parallele in cui, dopo una valutazione iniziale delle competenze intellettive di ogni alunno, si distribuissero gli stessi in numero decrescente di 1/3 con il decrescere della valutazione intellettuale dei soggetti.

Sul tema dell'eliminazione degli esami, invece, si faceva leva sulla motivazione per cui bastasse basare il giudizio sugli alunni sulle classificazioni ottenute nel corso dell'anno scolastico e sul lavoro scritto⁶¹. In particolare, infatti, si pensava che caricare eccessivamente l'alunno di esami di fine anno potesse addirittura essere controproducente in quanto la preparazione alla prova annuale comportava un insegnamento più affrettato e superficiale. L'esonero dall'esame, invece, avrebbe contribuito a tener più vivo l'interesse dell'alunno nei confronti dello studio. Si proponeva, pertanto, il mantenimento dell'esame finale solo al termine delle classi terza e quinta facendolo, così, diventare facoltativo nelle altre classi solo nel caso di presenza di insufficienze nelle valutazioni dello studente⁶².

In merito alla refezione scolastica, poi, la Sezione presentò una lettera alla Giunta Municipale con la quale si chiedeva la distribuzione di cibo per gli alunni poveri⁶³. La linea sostenuta era quella dell'obbligo per il Comune di fornire la colazione ai fanciulli bisognosi e per sostenere ciò la Sezione arrivò anche a votare un ordine del giorno in cui si vietava ai soci qualsiasi partecipazione a Patronati e Comitati caritatevoli sorti per la raccolta di fondi privati a sostegno della refezione degli studenti indigenti. Anche in questo caso la proposta fu criticata in quanto, si sosteneva, non era opportuno allontanare i maestri dalle iniziative sorte nelle scuole e per esse: il divieto di partecipazione ai Patronati venne pertanto respinto dall'assemblea⁶⁴. La linea di condotta era, però, stata indicata, tant'è che nel corso di un'assemblea successiva furono aspramente criticati i due soci della Sezione Robbiani e Formigoni in quanto coinvolti in vario modo proprio nei lavori di alcuni patronati locali⁶⁵. Secondo Linda Malnati, infatti: «l'opera compiacente dei compagni arresta l'idea che la questione della refezione scolastica debba essere risolta dal Comune»⁶⁶ invitando i soci che non volessero adeguarsi alle deliberazioni della Sezione a dare le dimissioni.

A stemperare la polemica intervenne infine Vittorio Emanuele Mariani il quale affermò che:

⁶¹ *Ibid.*, Adunanza del 7 giugno.

⁶² AFGF, LM, SMCL, VS III, *Assemblea del 27 gennaio 1898*.

⁶³ AFGF, LM, SMCL, VS II, *Assemblea del 30 aprile 1896*.

⁶⁴ *Ibid.*, *Assemblea del 22 ottobre 1896*.

⁶⁵ AFGF, LM, SMCL, VS III, *Assemblea del 30 aprile 1897*.

⁶⁶ *Ibid.*

La Sezione Maestri della Camera del Lavoro fu fondata coll'intendimento di contribuire per quanto è possibile all'odierno movimento d'emancipazione dei lavoratori. Qui siamo ben visti, ma dobbiamo dare anche buon esempio. Bisognerebbe che nel trattare i propri interessi la Sezione adottasse gli stessi metodi di lotta adoperati dagli operai. Bisognerebbe far sentire la nostra influenza non solo individualmente, ma anche come gruppo. O informare le nostre azioni secondo gli intendimenti della Camera o rassegnarsi a scomparire⁶⁷.

L'opera della Sezione, come si è detto, non si esplicò solo all'interno ma la portò a partecipare a congressi e manifestazioni di vario genere allo scopo di meglio diffondere le proprie idee e creare solidarietà di classe.

Il primo congresso cui l'organizzazione decise di partecipare a tale scopo fu il Congresso Magistrale Italiano⁶⁸. Indetto dal 3 al 5 settembre 1894 a Milano dall'Associazione Magistrale, già nella riunione di giugno di quell'anno emerge come la Sezione avesse predisposto delle apposite commissioni per studiare i temi proposti dagli organizzatori del congresso e prepararne delle relazioni da presentare poi in assemblea. Oltre alla volontà di concorrere pecuniariamente al congresso, inoltre, il Comitato decise di proporre come proprio tema da discutere al congresso la questione dei maestri e le Camere del Lavoro. L'obiettivo era esplicito: «i nostri delegati sviluppandolo hanno modo di portare al Congresso tutta la n[ost]ra bandiera e dispiegarvela»⁶⁹. Già in questa prima assemblea ci furono soci che sollevarono il dubbio che il tema non potesse venire

⁶⁷ *Ibid.*

⁶⁸ Informazioni in merito al Congresso sono presenti sulla Gazzetta Ufficiale del 1894. In particolare: «La data per l'inaugurazione del Congresso magistrale italiano indetto dall'Associazione magistrato milanese è stata fissata al 3 settembre prossimo. Le sedute si chiuderanno il giorno 5. Le adunanze saranno tenute, in Milano, nell'aula magna del R. Liceo Beccaria (Piazza Sant'Alessandro). Sono membri del Congresso: gli insegnanti primari pubblici o privati; i direttori didattici; i professori di Pedagogia delle Scuole normali. Le Società magistrali possono anche delegare la loro rappresentanza ad una persona che non sia maestro. Nel Congresso non si potranno discutere altre questioni fuori di quelle inerenti ai temi posti all'ordine del giorno che è il seguente: 1° Istituzione di scuole rurali pratiche e di scuole professionali a complemento della scuola obbligatoria. 2° Quali libri di testo si devono ritenere necessari – Da chi e come devono essere scelti. 3° La Licenza elementare. 4° La ginnastica nelle scuole elementari come fattore educativo. 5° (Da trattarsi in sedute speciali) Organizzazione di una Federazione magistrale lombarda». (*Notizie varie*, «Gazzetta Ufficiale del Regno d'Italia», n. 191, 14 agosto 1894, p. 3999). Ed ancora: «Il Congresso dei maestri italiani sarà inaugurato la mattina del 3 settembre p.v. nell'Aula magna del Liceo Beccaria, piazza Sant'Alessandro. Sono state invitate le autorità cittadine, Prefetto, Sindaco, assessore della pubblica Istruzione, R. Provveditore, e due ispettori scolastici del circondario di Milano. La Commissione ordinatrice ha provveduto a mezzo del Municipio e del Consiglio degli Orfanotrofi 400 letti gratuiti; ha trovato facilitazioni sia per l'alloggio che pel vitto, presso parecchi alberghi e ristoranti, che saranno indicati sul *vademecum* dei congressisti. Ottenne dal Comitato esecutivo dell'Esposizione, un biglietto valevole per 3 giorni compresa la sera al prezzo di una Lira. È stata progettata una gita sul Lago di Como, colla spesa di circa lire 4, compresa la colazione sul Lago. Nella scuola comunale, Corsa P. Romana n. 10, ove ha sede la Commissione esecutiva, saranno addobbate parecchie sale di ritrovo dei congressisti» (*Notizie varie*, «Gazzetta Ufficiale del Regno d'Italia», n. 205, 31 agosto 1894, p. 4333).

⁶⁹ AFGF, LM, SMCL, VS I, *Adunanza del 14 giugno 1894*.

accettato in quanto «noi della Camera del Lavoro si vuol fare della politica»⁷⁰, ma la stessa Malnati si oppose fermamente alla critica in quanto la Sezione si manteneva fedele al principio di apoliticità e laicità fissato dallo Statuto. E se il socio Piazza ritenne addirittura offensivo nei confronti del Comitato organizzatore del congresso sospettare un'esclusione del tema proposto dalla Sezione, è interessante notare come Mor, membro di quello stesso Comitato organizzatore, riferisse all'assemblea che, a suo parere, il tema sarebbe stato difficilmente accettato ma che «cacciati dalla porta, potremo entrare per la finestra, a proposito di un tema proposto dai Maestri rurali»⁷¹. Alla fine si votò a favore di un ordine del giorno che stabilì di partecipare ufficialmente al Congresso Magistrale per poter avere modo di essere liberi di domandare e ottenere la parola e di concorrere pecuniariamente con venticinque lire. Meno di un mese dopo, però, nella riunione del 10 luglio 1894, la partecipazione ufficiale al congresso venne fortemente messa in discussione in quanto il tema proposto dalla Sezione non era stato accettato dal Comitato organizzatore. Dalla discussione che ne seguì emersero due indirizzi: chi voleva non si partecipasse più in alcun modo al congresso e si organizzasse, anzi, negli stessi giorni in cui si sarebbe tenuto, una contro-conferenza di propaganda e chi, invece, sosteneva la necessità di partecipare ugualmente allo stesso, anche se non più ufficialmente, in modo da poter far conoscere le proprie idee⁷². La partecipazione, alla fine sarà, «ufficiosa ma efficacissima»⁷³; esito principale del congresso fu certamente la creazione della Federazione Magistrale Lombarda⁷⁴ cui la stessa Sezione, con adunanza dell'8 novembre, decise l'immediata adesione.

Migliore fortuna ebbe, invece, la partecipazione al successivo Congresso sugli infortuni sul lavoro; i temi proposti riguardavano i mezzi per ottenere la severa applicazione della legge sull'istruzione obbligatoria⁷⁵ e i modi per

⁷⁰ *Ibid.* L'affermazione, in particolare, è di Umberto Biraghi.

⁷¹ *Ibid.*

⁷² *Ibid.*, *Adunanza del 10 luglio 1894*.

⁷³ *Ibid.*, *Assemblea del 9 gennaio 1895*.

⁷⁴ Il congresso nazionale tenuto a Milano vide una fortissima partecipazione del corpo insegnante e, in particolare, dei maestri rurali. Proprio a causa di questa forte partecipazione fu in gran parte rovesciato l'ordine del giorno, il quale prevedeva l'esame di questioni pedagogiche e didattiche, e furono invece ampiamente dibattuti temi riguardanti le condizioni economiche, giuridiche e morali dei maestri. I promotori del congresso avevano previsto una seduta per la costituzione della Federazione Magistrale Lombarda, ma alla fondazione di questa si affiancò presto, discussa in sedute pubbliche generali, la costituzione di una Federazione Magistrale Nazionale. Fu, quindi, eletto un Comitato provvisorio per un anno con l'incarico di fondare la *Federazione Nazionale delle società magistrali italiane*. Di tale comitato, costituito da sette membri, faceva parte, anche Guido Antonio Marcati. Al momento manca ancora una ricostruzione completa dei vari tentativi di costruzione, da parte dei gruppi magistrali, di un'organizzazione magistrale a carattere nazionale. Cenni in proposito possono trovarsi in Chiosso (ed.), *Scuola e stampa nell'Italia liberale*, cit., pp. 292-311.

⁷⁵ La legge 15 luglio 1877 n. 3968, nota come legge Coppino sull'istruzione obbligatoria, portava a cinque le classi della scuola elementare, rendeva gratuita l'istruzione elementare e introduceva le sanzioni per chi disattendeva l'obbligo. Le spese per il mantenimento delle scuole

far osservare l'applicazione della legge sul lavoro dei fanciulli⁷⁶. Il Comitato aderì prontamente al congresso partecipandovi con quattro delegati: Giovanni Griffini, Luigi Ferrario, Ambrogina Viglezzi-Besana e Lora Vismara⁷⁷. In merito alla questione sull'istruzione obbligatoria la Sezione volle presentare proprie conclusioni e proposte tenendole ben distinte da quelle presentate dalla Commissione centrale della Camera del Lavoro. Ciò perché queste vennero ritenute di natura eccessivamente amministrativa, mentre i soci si proponevano di portare più all'attenzione la questione sociale, denunciando i ritardi e le carenze governative che impedivano alle famiglie volenterose di mandare a scuola i propri figli. Le proposte avanzate dalla Sezione, infine, furono le seguenti:

1°) Che la famiglia dalla legge obbligata a mandare a scuola i propri figli goda tale benessere finanziario da poter rinunciare alla cooperazione lavorativa dei medesimi, e da poter sopperire a quei servizi che ora son disimpegnati da fanciulli di 7, 8 o 9 anni; 2°) Che l'amministrazione locale appronti quante scuole e maestri son necessari; 3°) Che l'orario giornaliero e le vacanze siano a seconda dei bisogni speciali della popolazione cui è destinata la scuola; e che il tempo, l'orario e le formalità dell'iscrizione siano tali da non riuscir discomode alle popolazioni stesse. 4°) Che la scuola popolare primaria basti a se stessa⁷⁸.

Per ciò che concerneva, invece, la legge sul lavoro dei fanciulli, le soluzioni individuate dal Comitato furono le seguenti:

1°) Che lo stato provveda con un personale adatto e sufficiente alla sorveglianza degli stabilimenti che ammettono fanciulli al lavoro, e che non si limiti a farli visitare una sol volta in un anno, ma spesso, di sorpresa e specialmente anche di notte ove c'è lavoro notturno; 2°) Che l'attribuzione di concedere libretti di lavoro ai fanciulli, invece che alla Camera di Commercio sia là ove esistano Camere del Lavoro, affidate a questi enti, soli e legittimi rappresentanti dei lavoratori e dei loro interessi. 3°) sui libretti del lavoro alla domanda: «Sa leggere e scrivere?» si sostituisca quest'altra: «È stato prosciolto dall'obbligo dell'istruzione?». E si insista perché non siano ammessi quei fanciulli al di sotto dei 12 anni che non ottennero l'attestato di proscioglimento⁷⁹.

rimasero, però, a carico dei singoli comuni, i quali, nella maggior parte dei casi, non erano in grado di sostenerle facendo sì che la legge non fosse mai attuata pienamente. Nonostante questo, la Legge Coppino, insieme alla riforma di democratizzazione dello stato con la legge elettorale del 1882, ebbe una rilevante importanza e contribuì in buona misura ad una diminuzione sempre crescente dell'analfabetismo nell'Italia di fine Ottocento.

⁷⁶ La legge 11 febbraio 1886 n. 3657 sul lavoro dei fanciulli negli opifici industriali, nelle cave e nelle miniere può considerarsi la prima norma emanata in Italia per tutelare il lavoro dei minori, cercando di limitarne lo sfruttamento fissando a nove anni l'età minima di ammissione al lavoro e proibendo il lavoro notturno ai minori di dodici anni. Di fatto la legge (nota anche come legge Berti dal nome del suo presentatore in Parlamento) non riuscì a essere applicata a causa della mancanza di presupposti nella situazione economica, politica e sociale italiana di quel periodo.

⁷⁷ AFGF, LM, SMCL, VS I, *Seduta del 9 dicembre 1894*.

⁷⁸ *Ibid.*, *Assemblea del 9 gennaio 1895*.

⁷⁹ *Ibid.*

Un'altra questione, infine, dibattuta all'interno della Sezione, nella seduta del 14 gennaio 1897, fu quella della pubblicazione di un periodico che fosse espressione della Sezione stessa. Presentata da Vittorio Emanuele Mariani e da Maria Venco, la proposta prese l'avvio dalla constatazione di come mancasse in quel momento a Milano un «giornaleto didattico per quei compagni che volessero istruire gli operai per diventare elettori»⁸⁰. L'idea incontrò però, anche in questo caso, la decisa opposizione di alcuni soci, quali Piazza e Ferrario, i quali ritenevano superflua una simile pubblicazione perché già esistevano mezzi atti allo scopo (giornali di propaganda e libri di lettura specificatamente rivolti agli operai). Alla lettura di giornali e libri, sostenevano gli oppositori, sarebbe dovuta essere sostituita la presenza, specie in campagna, di buoni maestri. Questa constatazione, però, fu facilmente sovvertita dai sostenitori della pubblicazione: proprio perché i maestri di campagna erano in quel momento impossibilitati a partecipare ai circoli socialisti, era solo tramite la propaganda a mezzo della stampa che si sarebbe riusciti a dare agli operai del materiale didattico per meglio prepararsi ad essere degli elettori⁸¹. Approvata, quindi, infine dall'assemblea la proposta di iniziare i lavori per avviare la pubblicazione periodica di un giornale, il progetto iniziò a prendere forma tramite un'apposita commissione nominata dai soci Mariani, Malnati e Robbiani per iniziare a tracciare il programma della pubblicazione e stabilirne i lavori. Le spese di stampa non sarebbero, inoltre, state a carico della Sezione ma sarebbero state sostenute o dalla Federazione Socialista Milanese o dalla Commissione Esecutiva del Partito Socialista⁸².

Le vicende immediatamente successive, come si vedrà, imposero però un fermo a tutte le attività della Sezione e anche il progetto di fondazione del periodico dovette essere accantonato.

4. *Lo scioglimento della Sezione e la successiva rinascita dell'associazionismo magistrale*

Una delle ultime questioni che la Sezione ebbe modo di affrontare prima della crisi scatenata dai fatti del maggio 1898 fu quello della passeggiata patriottica.

Indetta dal Comune di Milano in occasione dei festeggiamenti per le cinque giornate del 1848⁸³ fu contestata dalla Sezione milanese, nella riunione del

⁸⁰ AFGF, LM, SMCL, VS III, *Assemblea del 14 gennaio 1897*.

⁸¹ *Ibid.*

⁸² *Ibid.*, *Assemblea del 25 febbraio 1897*.

⁸³ Si festeggiava l'insurrezione avvenuta tra il 18 e il 22 marzo 1848 a Milano, allora facente parte del Regno Lombardo-Veneto, che portò alla liberazione della stessa dal dominio austriaco. Fu uno dei moti liberal-nazionali europei del 1848-1849 nonché uno degli episodi principali della storia risorgimentale italiana del XIX secolo, preludio all'inizio della prima guerra di indipendenza.

27 gennaio, in quanto la preparazione ginnastica disposta dalle autorità per la sfilata degli alunni al Monumento ai Caduti era vista dai maestri come un'ingerenza nell'educazione dei fanciulli:

L'educazione pubblica è nell'animo dei fanciulli preparata ed ajutata, non dall'influenza dei comandi scolastici, né dalla vanità di aver, come scolare, agito in una predisposta rappresentazione sulla scena sociale; ma dall'esempio che gli alunni ritraggono, spontaneamente assistendo agli atteggiamenti degli adulti, in armonia colla partecipazione della famiglia. [...] L'adoperar gli scolari per dimostrare determinati sentimenti e propensioni d'ordine pubblico, cui i medesimi sono prematuri, mentre non giova pronto all'educazione delle fanciullesche masse maneggiate a sceneggiare, insegna però altrui ad abusare dell'ascendente che ha l'uomo rivestito di qualche autorità sugli alunni delle scuole primarie⁸⁴.

Si votò, pertanto, un ordine del giorno in cui si dichiarò la passeggiata pubblica non solo diseducativa, ma esorbitante dai diritti dell'amministrazione comunale stessa.

La replica del Soprintendente scolastico, definita nel verbale del 25 febbraio addirittura «acerba»⁸⁵, costrinse la Sezione a convocare i soci in assemblea straordinaria per decidere i mezzi da impiegare per contrastare le accuse di scarso senso patriottico che subito furono mosse ai membri dell'organizzazione dalle autorità e dalla stampa milanese. Una prima replica immediata alle accuse era stata fatta già prima della convocazione dell'assemblea per mezzo del «Corriere della Sera» il quale, però, si era rifiutato di riportare integralmente il testo della lettera inviata dalla Sezione. Ma ciò non era bastato per arrestare la crisi scatenata dall'ordine del giorno del 27 gennaio e che aveva portato anche alle dimissioni di molti soci dalla Sezione stessa. La linea di difesa che la Sezione decise di assumere fu quella proposta da Linda Malnati la quale sostenne la necessità di ignorare le accuse di scarso senso patriottico mosse dai giornali e concentrarsi, invece, su una difesa delle proprie posizioni attraverso l'uso di argomentazioni igienico-pedagogiche⁸⁶. A supporto di tali tesi, inoltre, si decise di sottoporre le stesse al giudizio di alcuni noti pedagogisti cui fu, quindi, inviato l'ordine del giorno 27 gennaio con l'aggiunta di tre quesiti stilati da Mariani e volti a riassumere i principi esposti nell'ordine del giorno stesso⁸⁷. L'ultima seduta del 31 marzo 1898 è ancora interamente incentrata sul tema della parata scolastica e sulla difesa che la Sezione stava strenuamente portando avanti per l'affermazione dei propri principî: si approvò, infatti, la relazione stilata dal socio Francesco Robbiani per la difesa dell'organizzazione e che,

Per approfondimenti: F. Della Peruta, F. Mazzocca (edd.), *Milano, dalla Restaurazione alle Cinque Giornate*, Milano, Skira, 1998 e A. Monti, *Il 1848 e le cinque giornate di Milano. Dalle memorie inedite dei combattenti sulle barricate*, Milano, Hoepli, 1948.

⁸⁴ AFGF, LM, SMCL, VS III, *Assemblea del 27 gennaio 1898*.

⁸⁵ *Ibid.*, *Assemblea del 25 febbraio 1898*.

⁸⁶ *Ibid.*

⁸⁷ *Ibid.*, *Assemblea straordinaria del 21 marzo 1898*.

molto probabilmente, era previsto venisse poi diffusa per mezzo della stampa cittadina⁸⁸.

Tale polemica andava, però, ormai a inserirsi un clima politico molto teso. Pochi mesi dopo questa discussione, infatti, il 6 maggio di quell'anno avevano inizio a Milano le cosiddette «quattro giornate», un moto di protesta che riprendeva i tumulti scatenatisi in Italia già dal gennaio 1898 e causati dalle gravi condizioni sociali del paese; a Milano tale rivolta fu duramente repressa dall'esercito regio agli ordini del generale Bava Beccaris⁸⁹ il quale, com'è noto, non esitò a usare i cannoni sulla folla dopo che fu dichiarato lo stato d'assedio⁹⁰.

In occasione dei tumulti la Camera del Lavoro non espresse in alcun modo il proprio appoggio alle manifestazioni, ma ciò non bastò per salvarla dalla successiva ondata repressiva la quale portò allo scioglimento di Camere e giornali di opposizioni⁹¹.

La Camera milanese, in particolare, con le sue centoventicinque sezioni e i suoi tremila soci fu immediatamente chiusa con il divieto di ricostituzione, i suoi locali occupati dalle truppe e tutti i suoi documenti sequestrati⁹².

La dissoluzione della Camera, lungi dal fermare il lavoro dei suoi membri, ne segnò anzi un deciso cambiamento di prospettiva: i suoi membri, infatti, presero coscienza che all'attacco, politico, di maggio era necessario dare una risposta politica⁹³. Dalle sole rivendicazioni economiche, così, si passò alla lotta politica e in quest'ottica la Camera partecipò all'avvio della collaborazione tra socialisti, repubblicani e radicali la quale portò alla costituzione della giunta popolare con a capo il democratico Giuseppe Mussi⁹⁴.

Il lungo e faticoso lavoro di ricostituzione della Camera del Lavoro portò alla nuova fondazione della stessa il 15 aprile 1900, giorno di Pasqua. La coincidenza, tutt'altro che casuale, voleva proprio simboleggiare la resurrezione dell'istituto camerale, come può leggersi nella circolare della Commissione esecutiva: «la Camera del lavoro Milanese ha deliberato di solennizzare nella festa del 15 aprile p.v. la propria risurrezione. In quel giorno, Ella si propone di vedersi intorno raccolti tutti i mestieri»⁹⁵.

⁸⁸ *Ibid.*, *Seduta del 31 marzo 1898*.

⁸⁹ Cfr. Colapietra, *Bava Beccaris Fiorenzo*, in *Dizionario biografico degli italiani*, cit., Vol. 7, 1970, pp. 302-303.

⁹⁰ Sui sanguinosi moti milanesi si veda A. Canavero, G. Ginex (edd.), *Il '98 a Milano. Fatti, personaggi, immagini*, Milano, Mazzotta, 1998.

⁹¹ Cfr. Bonaccini, Casero, *La Camera del Lavoro di Milano*, cit., p. 161.

⁹² *Ibid.*, pp. 152-155. Cfr. anche *La chiusura della Camera del lavoro*, «La Lombardia», 8 maggio 1898, p. 1.

⁹³ Cfr. G.M. Longoni, *La nascita della Camera del lavoro*, in Granata, Scalpelli (edd.), *Alle radici della democrazia*, cit., p. 54.

⁹⁴ Giuseppe Mussi (1836-1904) fu eletto sindaco di Milano il 18 dicembre 1899 rimanendo in carica fino 16 dicembre 1903 (cfr. *ibid.*).

⁹⁵ *La Pasqua della Camera del lavoro*, «La Lotta», 14 aprile 1900, p. 1.

Membro della Commissione esecutiva della nuova Camera del Lavoro fu, tra gli altri, proprio Linda Malnati⁹⁶, simbolo essa stessa della rinascita non solo della Camera, ma anche della Sezione Maestre e Maestri milanese. Il 30 giugno 1900 fu redatto il nuovo Statuto dell'organizzazione il quale, però, rimase in realtà immutato rispetto al precedente del 1893⁹⁷.

Una rinascita, quella della Sezione, che voleva, quindi, riprendere le fila di quella trama bruscamente interrotta nel maggio 1898; ma i tempi erano ormai mutati: i lunghi anni di esperienza partecipativa, le lotte per l'affermazione della cooperazione tra gli insegnanti, la nascita e lo sviluppo di una stampa periodica magistrale, le repressioni del 1898 e le successive rinascite di Camere e associazioni magistrali avevano ormai modificato le coscienze e le aspettative del corpo insegnante, pronto ora a unire le proprie forze per perseguire quel processo di nazionalizzazione professionale cui tanto si era lavorato⁹⁸.

Fu in questo nuovo clima politico e sociale che il 4 aprile 1901 centootto delegati rappresentanti centoquarantuno società e cinquantuno associazioni magistrali si riunirono nel teatro Argentina di Roma per discutere della creazione di un'unione nazionale insegnanti: all'importante assise parteciparono, anche, Vittorio Emanuele Mariani e Angelo Sicchirollo⁹⁹.

Al termine del congresso fu decretata la nascita dell'Unione Magistrale Nazionale e nella votazione dei primi membri della Commissione direttiva si ritrova anche il nome di Vittorio Emanuele Mariani quale consigliere¹⁰⁰. Un ulteriore, importante, riconoscimento dell'influenza e della stima di cui godeva la Sezione milanese.

⁹⁶ Cfr. Imprenti, *Operaie e socialismo*, cit., p. 40. Linda Malnati era stata membro della Commissione esecutiva della Camera del Lavoro anche negli anni 1893 e 1894 insieme con Vittorio Emanuele Mariani (che nel 1893 ne fu anche vicepresidente), mentre dal 1895 al 1897 era stata eletta a membro la socia Ambrogina Viglezzi-Besana cui era poi succeduto, nel 1898, Ercole Maffi. Cfr. Antonioli, Torre Santos, *Riformisti e rivoluzionari*, cit., pp. 60 ss.

⁹⁷ AFGF, LM, SMCL, *Statuto della Sezione maestre e maestri della Camera del lavoro di Milano, 30 giugno 1900*.

⁹⁸ A tal proposito nota Carla Ghizzoni: «Il fatto stesso che fosse nominato presidente dell'associazione Luigi Credaro, un deputato e non un maestro, documenta la tendenza della classe magistrale dell'epoca a concepirsi come forza subalterna e a pensare alla propria azione organizzata ancora sotto la paternalistica tutela di un potere forte» (Ghizzoni, *Essere maestri in Italia fra Otto e Novecento*, cit., p. 482).

⁹⁹ In particolare Vittorio Emanuele Mariani fu il delegato della Sezione Maestre e Maestri di Milano, mentre Angelo Sicchirollo fu mandato in rappresentanza delle Sezioni di Abbiategrasso, Sampierdarena, Guastalla e Pianello. Per l'elenco di tutti i delegati si veda *Unione Nazionale delle Maestre e dei Maestri italiani*, «I diritti della scuola», vol. 2, n. 26, 13 aprile 1901, p. 189. Cfr. anche Barausse, *L'Unione Magistrale Nazionale*, cit., pp. 38-54. Sulle origini della UMN si veda anche C. Ghizzoni, *Il Maestro nella scuola elementare italiana dall'Unità alla Grande Guerra*, in R. Sani, A. Tedde (edd.), *Maestri e istruzione popolare in Italia tra Otto e Novecento. Interpretazioni, prospettive di ricerca, esperienze in Sardegna*, Milano, Vita e Pensiero, 2003, pp. 19-80.

¹⁰⁰ Barausse, *L'Unione Magistrale Nazionale*, cit., p. 53 e 'Unione Nazionale delle Maestre e dei Maestri Italiani', *Primo congresso delle società magistrali del Regno. Discorsi, Statuto, Istruzioni*, Milano, s.e., 1901.

Appendice Documentaria

Sezione Maestre e Maestri

Milano *Camera del Lavoro* Via Crocefisso 15

*Verbali delle Sedute*¹

Libro N. 2²

Assemblea del 1° Marzo 1894

Sono presenti i Sig.: Ambiveri, Croce, Mor, Moro, Mantegari, Mariani, Piazza, Gelmi, Ermoli, Teotti, Moroni, Craici, Riva, Mattioli, Bertoglio, Ajelli, Formigoni, Biraghi, Maffi, Quarello, Robbiani, Tornaghi, Repossi, Ferrari, Ferrario, Milani, Zanoletti, Griffini; e le Sig.^{ce}: Cuniberti, Somasca Virginia, Somasca Isabella, Lodigiani, Moroni, Contavalli, Paganetti, Martinengo, Crivelli, Az[z]imonti, Griffini e Sperati. = Presidente Mariani =

Vien letto il Verbale dell'ultima seduta, che viene approvato dopo un'operazione da parte del sig.^r Milani che desidera sia tolto l'inciso del «divagare» a lui riferito dall'estensore del medesimo, parendogli ciò, un apprezzamento personale, anziché l'imparziale rendiconto della seduta.

Il Presidente fa le seguenti comunicazioni:

a) Nuovi soci che si sono iscritti alla Sezione dopo l'ultima adunanza: Zurla Italia, Martinengo Clotilde, Quarello Battista, Ravagnati Armida, Contavalli Antonietta, Griffini Ongaro Virginia, Enrico Mor, Ercole Maffi, Editto De Luca Masotti (Busto Arsizio) – Colombo Elisa – Rossi Silvia, Moroni Rosa, Paganetti Rosa, Viglezzi Besana, Lodigiani Giuseppina (Bollate)

¹ I verbali sono conservati presso l'Archivio della Fondazione Giangiacomo Feltrinelli di Milano, e più precisamente nel Fondo Luigi Musini, fasc. Sezioni magistrali della Camera del Lavoro (1893-1909), n. 12/11. Tale fondo contiene fogli a stampa recanti gli statuti della Sezione maestre e maestri della Camera del Lavoro di Milano (2 marzo 1893 e 30 giugno 1900) e i verbali delle sedute dell'assemblea della suddetta Sezione. I documenti sono visualizzabili anche sul sito internet dell'Archivio all'indirizzo <http://www.fondazionefeltrinelli.it/feltrinelli-cms/cms.view?munu_str=0_6_0_1&numDoc=97> (ultimo accesso: 15 dicembre 2012).

² Allo stato attuale non è stato possibile reperire (in quanto non risultano essere conservati) i verbali del primo libro relativi al primo anno di attività della Sezione magistrale. I verbali qui di seguito pubblicati sono inerenti all'attività svolta negli anni 1894-1898.

b) Partecipa che fu indirizzato dal Comitato, a nome della Sezione, un ringraziamento a Leopoldo Marengo

c) Annunzia che verrà indetto alla Camera del Lavoro, a cura della Sezione, un corso di conferenze di carattere scientifico, tenute dal Prof. Gonnelli-Cioni «Direttore dell'Istituto dei Frenastenici in Vercurago»; una conferenza di carattere sociale, terrà fra alcune settimane il Prof. E. Cicotti; altre conf. poi, si terranno in seguito.

È desiderio del Comitato di raccogliere in opuscoli le Conferenze che si sono fino a qui tenute e quell'altre che mano mano si terranno, e ciò a scopo di propaganda. Se vi sarà qualche utile finanziario, verrà versato a beneficio del fiendo Ricreatorio.

d) Rende note le pratiche fatte dal Comitato in questi ultimi tempi, al fine di promuovere anche nelle altre città, ove hanno sede le Camere del Lavoro, le istituzioni delle Sezioni Maestri; è lieto di poter riferire che in parecchie città, come a Firenze, Parma, Cremona, Pavia... si sono già costituite o sono in via di costituzione, modellandosi sul ns Programma-Statuto; da altri siti ci arrivano domande di schiarimenti, consigli ecc. Il Comitato continuerà nella sua iniziativa fino alla costituzione di una Federazione di tutti i Maestri aggregati alle Camere del Lavoro.

e) Parla dell'agitazione fatta d'accordo colla Magistrale per l'aumento degli stipendi ai Maestri di Milano; ricorda che il Comitato non ha mancato, a tempo debito, di andare a bussar a più porte a potuto, senza guardare a colore politico, poiché in questa questione si trattava non di principio ma di interessare in favor nostro il maggior numero di Consiglieri possibili; se la cosa è caduta certo non è da imputarsi alla ns trascuranza. Ora, per risollevarla e per mantenerla viva, trova conveniente procedere ancora di comune accordo colla Magistrale, salvo però sempre il principio della parità di trattamento delle Maestre e dei Maestri.

f) Ricorda la richiesta fatta dall'«Unione impiegati» perché le si diano Delegati e Ispettori alle sue scuole serali: il Comitato ha già provveduto nelle persone dei Soci Ferrario e Mor.

g) Finisce le sue comunicazioni, proponendo si aggiunga all'Ordine del giorno dell'odierna seduta, la *Nomina di una Commissione di Consulenza e di difesa per Maestri*; e siccome l'Assemblea all'unanimità approva, è messo tosto ai voti e accettato un Ordine del giorno col quale si deferisce al Comitato Direttivo, la nomina di detta Commissione.

Alcuni soci domandano la parola sulle comunicazioni: fra gli altri Biraghi per avere schiarimenti circa la Commissione per lo studio degli stipendi; Ferrario per proporre si faccia indefessa propaganda fra i Maestri di campagna perché è ad essi che dobbiamo porgere il maggior aiuto; aggiunge che, in quanto al lavoro da farsi in comunione colla Magistrale, egli è di parere contrario; crede che non possa né si debba stare assieme nel lavoro, poiché la linea di condotta e i principî delle due Associazioni sono molto diversi: quelli della Magistrale battono una strada, noi ne calchiamo un'altra: ognuno lavora per proprio conto.

Il Presidente terrà conto delle dichiarazioni del Socio Ferrario.

Si passa alla «Nomina dei Revisori dei Conti», per scrutinio segreto. Vengono eletti: la Sig.^{ra} A[z]zimonti Freguglia e il Sig. U. Biraghi.

Dopo di chè è aperta la «Discussione sulla Circolare – Progr. del R.° Ispettore Borghesio».

Piazza s'è posto la domanda: Ha egli diritto un Ispettore di emanare una Circolare – programma? Se così fosse i Programmi didattici non li farebbe il maestro ma l'Ispett.⁶. Ha fatto passare le Leggi, i Regolame. e le Circolari emanati dal 59 a questa parte e non ha trovato nessuno Art.º, nessuna Disposizione, che dia agli Ispettori tale facoltà. Lui non vuole entrare in merito alla odierna Circolare Borghesio, ma intende trattare e discutere la questione di massima: vuol provare colla scorta di legge, che un Ispettore esce dalla legalità proponendo e, peggio, imponendo un proprio programma. Cita l'art. 34 della legge Casati³; le Istruzioni ministeriali 28 febbraio 1862; il Regolamento 3 novembre 1877⁴ per l'Amministrazione scolastica provinciale; la Circolare 14 gennaio 1886 ai R.R. Provveditori ed Ispett.¹ scolast.; il Regolame. Unico 16 febbraio 1888; la Circolare 24 settembre 1893 ai R.R. Provvedit. ed Ispett.¹ scolastici, che non danno facoltà agli Ispettori di prescrivere programmi didattici particolareggiati. Suffraga le sue deduzioni col ricordare la deliberazione presa dal Consiglio di Stato in una vertenza fra Insegnanti e Comune ove è detto che il Maestro non è tenuto a presentare il proprio programma. Conclude, proponendo un Ordine del giorno, nel quale, dimostrata la illegalità della Circolare Borghesio, si delibera di far le pratiche necessarie perché la medesima venga ritirata.

Sorgono Ermoli e Mor a mettere in dubbio la illegalità attribuita alla Circolare. Forse, dicono, vi possono essere altre disposizioni che, sebbene le pazienti indagini, al Piazza sono sfuggite e che danno facoltà all'Ispettore, quando il crede opportuno, di fissare i programmi didattici; forsanco può darsi – per quanto poco probabile – che l'Ispettore Borghesio abbia avuto l'autorizzazione, a diramare la sua Circolare, dal Ministero stesso. Se le due ipotesi qui poste, fossero nel vero, la proposta Piazza cadrebbe. Noi dobbiamo piuttosto guardare la questione dal lato didattico e pedagogico. Il Programma Borghesio è per lo meno esorbitante: protestiamo per questo.

Mor, poi, insiste nella critica del medesimo: lo chiama non una razionale e giudiziosa interpretazione dei programmi ministeriali, ma una vera sostituzione con offesa speciale al senso della misura. Esso anziché di sussidio, tende a sviare il maestro da quel criterio direttivo e distributivo nell'insegnamento delle singole materie che deve esser norma precipua di un coscienzioso insegnante. Rapporto all'allievo è in contraddizione al canone pedagogico moderno il quale reclama che le cognizioni vengano impartite e come oggetto di coltura e come disciplina.

Propone un Ordine del giorno riassumendo questi concetti, facendo voti perché l'Autorità competente inviti il R. Ispettore Borghesio a ritirare la sua Circolare.

Robbiani dice che il Comitato ha compilato un Ordine del giorno, cogli stessi criteri testé esposti da Mor, e invita il Presidente a darne lettura.

Viene letto.

Ferrario vuole che i due ordini del giorno, di Mor e del Comitato, si fondano assieme in un solo; però non crede opportuno di far voti e implorare da altri i rimedi.

³ L'articolo 34 del Regio Decreto legislativo 13 novembre 1859 n. 3725 recita «I Rettori, i Provveditori e gli Ispettori provinciali, ciascuno nel rispettivo ramo, rappresentano il Ministro e ne fanno eseguire ordini».

⁴ Con il Regolamento 3 novembre 1877, n. 4152, le attribuzioni del provveditore furono trasferite al prefetto, cui spettava, quindi, l'amministrazione scolastica locale.

Conclude proponendo un Ordine del giorno, in questo senso.

Maffi Ercole desidera che la questione sollevata da Piazza sia da considerarsi come la principale. Il resto è buono, ma accessorio. Quindi l'ordine del giorno da votarsi, sia la fusione di tutte queste idee.

Piazza insiste a dire che la questione più importante è di provare che l'Ispettore è fuori legge. Noi dobbiamo trattare la cosa in generale; entrando in merito alla Circolare Borghesio, facciamo questione piccina. Provata la illegalità, tutti gli altri appunti d'indole particolare cadono.

Anche Griffini è di questo parere. Per la parte didattica – dice – s'è già occupata la Magistrale e i Giornali. Ora noi dobbiamo occuparci solo della questione della legalità.

Ferrari presenta un Ordine del giorno riassumendo i concetti svolti negli altri Ordini.

Crivelli si unisce a Griffini. Vuole un Ordine del giorno dove sia considerata la illegalità, facendo cenno alle leggi e ai Regolamenti a cui s'è riferito il Piazza

Piazza non solo vorrebbe questo; ma insiste perché a ogni altra cosa preceda un'esplicita affermazione nella quale si dica che l'autorità di dettar programmi didattici spetta esclusivamente ai maestri.

Ferrario ad altri si associano a queste idee e col Piazza concordano il seguente ordine del giorno:

La Sez.^e Maestre e Maestri alla Camera del Lavoro di Milano, ritenuto che la competenza di predisporre programmi didattici particolareggiati spetta esclusivamente al Maestro;

visto: la legge Casati sull'Istruzione Pubblica; le Istruzioni Ministeriali 28 febbraio 1862; il Regolamento 3 novembre 1877 per l'Amministrazione scolastica provinciale; la Circolare 14 gennaio 1886 ai R.R. Provveditori ed Ispettori scolastici; il Regolamento Unico 16 febbraio 1888 e gli annessi Programmi; la Circolare 24 settembre 1893 ai R.R. Provveditori ed Ispettori scolastici, che non danno facoltà agli Ispettori di prescrivere programmi didattici particolareggiati;

deplora che dall'Autorità scolastica del Circondario di Milano, sia stato imposto a Municipi e Maestri il noto programma didattico Borghesio.

Messo ai voti viene approvato all'unanimità.

Dopo di ché la seduta è tolta.

Il Segretario I. Gelmi

Assemblea del giorno 12 aprile

Presenti i soci: Mariani, Vismara, Cuniberti, Clerici, Piazza, Craici, Gelmi, Moro, Mor, E. Maffi, Croce e Biraghi.

Presid. Mariani.

Vien continuata la questione Mor in riguardo alla Selezione degli scolari.

Mor relatore ha la parola. Non starà a ripetere quanto ha già detto nella sua Conf.^a e sul «Risveglio Educativo» in merito alle sue proposte. Si compiace di poter citare l'opinione di molti eminenti pedagogisti, la più parte dei quali si mostrò favorevolissima. Gli vennero mosse da alcuni di loro delle obiezioni che possono così riassumersi: 1) La selezione non è un provvedimento da potersi estendere alla generalità delle scuole, poiché è possibile solo nei grandi centri ove si hanno più classi parallele; 2) La selezione offende la suscettibilità di quei genitori in cui figli andranno a formare il contingente della classe dei deficienti; 3) La selezione priva la scuola d'uno dei maggiori coefficienti per raggiungere il suo scopo, togliendole l'emulazione.

L'oratore, pur dando grande peso a queste obiezioni, crede che queste non sieno di natura così esiziale, da indurlo a scartare le sue proposte; egli che in quest'anno ha fatto l'esperienza nella sua classe, dove accoglie tutti scolari deficienti, è riuscito a risultati relativame[n]te ottimi, senza che si avverasse solo uno degli inconvenienti, pei quali alcuni temono.

Conclude dicendo che non intende per niente affatto che il sistema della selezione sia tosto applicato su vasta scala; solo vorrebbe che lo si provasse in uno o più scuole in via di prova. Le stesse Autorità municipali hanno preso in considerazione la sua proposta; niente di più facile dunque l'ottenere d'esperimentarla.

Mariani crede che procedendo alla selezione nella scuola non vi sarà motivo di offendere la suscettibilità di nessun parente, poiché si ricorre a questa misura nel bene stesso dei fanciulli.

Anche in riguardo all'emulazione osserva che la non vi può essere nelle scuole ordinate come sono adesso, ove tanta è la disparità e la distanza fra i più distinti e i meno idonei.

Perciò appoggia il Relatore. Siccome poi attuandosi la selezione fra le classi, verrebbero in numero differente distribuiti gli alunni nelle medesime, vorrebbe si stabilisse un massimo per classe, degli ottimi, e un massimo per classe pei deficienti.

Maffi non vorrebbe che questa selez.^e diventasse da intellettuale, sociale; poiché i migliori sono di solito i più agiati, cioè quelli che, oltre al cibo più nutriente, sono anche i meglio assistiti a casa.

Biraghi è con Maffi. Aggiunge che si ha anche una gran difficoltà di trovare i maestri che vogliano assumersi il compito tanto faticoso di avere una classe composta di un elemento totalme[n]te negativo. Egli crede che il miglior modo di ovviare al grave guaio dei ripetenti è d'avere i maestri fissi per ogni classe.

Piazza non può votare in favore della proposta Mor, perché si verrebbe tacitame[n]te ad approvare l'ordiname[n]to attuale delle scuole. La proposta della Selezione non è che una panacea la quale non sana il male. Non vi è chi non veda come l'andame[n]to scolastico presente si regga a mala pena sui trampoli e dia luogo a gravi e continui inconvenienti. Riformiamo, grida, questa baracca dalle fondamenta.

Croce: Ritiene che causa principale della deficienza intellettuale di molti alunni siano le cattive condizioni economiche delle loro famiglie. Solo un miglior aspetto sociale, rimuovendo la causa, toglierà naturalmente l'effetto deplorato. Crede che le proposte Mor, rappresentino quanto è possibile al presente e perciò le appoggia.

Mor ribatte le argomentazioni mosse da alcuni oratori e conclude col dire che è lui il primo a credere che colle sue proposte non intende sanar il male, ma egli le trova più opportune, al presente per circoscriverlo e limitarlo. Ripete ch'egli intende avere dall'Assemblea, non un voto di plauso, ma un voto di incoraggiamento per ottenere di sperimentare, in via di prova, su alcune scuole di Milano la Selezione degli scolari. E a questo intento presenta il seguente ordine del giorno che viene approvato.

*L'Assemblea delle Sezioni Maestri e Maestre alla Camera del Lavoro
considerato:*

che il fatto della presenza di grandi disuguaglianze intellettive negli alunni di una stessa classe è causa non dubbia di scarso profitto nell'insegnamento, e perciò stesso, di aumento nel numero di ripetenti scolastici;

che l'azione del maestro – nel caso di alcuni alunni impreparati – a maggior influsso in ragione della minor estensione delle masse scolastiche sulle quali si esercita;

fa voti

perché la Soprintendenza scolastica locale – per l'anno venturo – in una scuola o in più scuole – esperimenti la prova di una più razionale distribuzione degli alunni fra sezioni parallele di una stessa classe, su queste basi:

1°) che in ogni sezione si verifichi non una relativa equivalenza sulla somma delle energie mentali, ma una approssimata equivalenza di energie individuali, valutata alla stregua di prove fatte nella prima quindicina del primo mese di scuola, così da formare certi tipi intellettivi principali.

2°) che il numero degli alunni nelle singole sezioni parallele decresca, in circa, di 1/3 col decrescere della valutazione intellettuale dei tipi, tenuto fermo che le classi migliori non superino i 50 alunni.

Il Presidente, avanti togliere la seduta, comunica una lettera della Segreteria della Camera del Lavoro, colla quale s'invitano le Sezioni a concorrere con sussidi, pei compagni della Camera del Lavoro di Napoli, ai quali il Consiglio Comunale di quella città non accordò [...] sussidio.

L'Assemblea vota di dare £ = 15 =. Dopo di ché la seduta è tolta.

Il Segret.º I. Gelmi

Adunanza del 7 giugno

Presenti: Pizzen, Piazza, Merlini, Mariani, Zanoletti, Maffi E., Maffi G., Ambiveri, Ferrari, Mor C.A., Formigoni, Griffini, Craici, Riva, Malnati, Rossi, Celsi, Teotti, Gelmi, Martinengo, Clerici, Biraghi.

L'Assemblea invita il socio Pizzen a far da presidente della Seduta.

Si legge il processo verbale dell'ultima tornata che viene approvato. Si passa quindi alla discussione dell'ordine del giorno, che reca: a) Relaz. dei revisori dei Conti; b) come ovviare alla diserzione degli alunni delle Scuole serali (Relaz.^e Mariani); c) Proposte in merito al futuro congresso magistrale.

Non essendo ancora presenti i Revisori dei Conti si incomincerà dal secondo comma:

Come ovviare alla diserzione degli alunni delle Scuole serali:

Mariani ha la parola: Egli ha preparato una relazione in proposito e viene approfondendola; può riassumersi così:

Ad ovviare alla diserzione degli alunni nelle Scuole serali, si propone:

1°) Non si inseriscano alunni che nell'anno precedente non abbiano terminato il corso senza giustificato motivo – o che ebbero un numero tale di assenze da rendere inefficace il loro intervento alla Scuola. Saranno però iscritti se, chiuso il periodo d'iscrizione, gli scolari della classe a cui aspirano, non avranno raggiunto il numero di 50 (per ciascun maestro);

2°) Sia fatto obbligo ad ogni maestro di mandare a chiedere notizie dell'alunno quando manca per tre sere consecutive;

3°) Sia obbligo dei genitori di recarsi una volta al mese a constatare le assenze dell'alunno e a prendere informazioni de' suoi diporti;

4°) In caso di accertata trascuranza da parte dei parenti, o di mancato impegno da parte dei padroni – che già hanno dato per iscritto il loro consenso a che l'alunno frequenti la scuola – siano essi dal Dirigente deferiti all'Autorità municipale, o per essa al Delegato del Mandamento urbano, perché sia loro inflitto il dovuto biasimo.

In questi casi, l'alunno non potrà essere riammesso alla Scuola senza il nulla osta dell'autorità municipale.

5°) Nelle scuole ove sono due o più classi parallele siano divisi gli alunni per età e per capacità, facendo più numerose l'aula dei più giovani e dei meno avviati allo studio.

Nelle scuole dove non esistono classi parallele si provveda facendo lo scambio con la scuola più vicina.

La Selezione deve essere fatta almeno dopo 15 giorni di scuola.

6°) Ad agevolare questa selezione venga per obbligo rilasciato a ciascun scolaro non promosso un attestato di frequenza (che già esiste presso le direzioni) portando le note personali e i punti meritati complessivamente all'esame finale

7) Sarebbe pure opportuno togliere (vista anche l'inutilità pratica e la sconvenienza igienica) togliere gli esami orali a fin d'anno, basando il giudizio sulle classificazioni riportate durante l'anno e del lavoro scritto.

8) La somma stanziata per premî sia destinata all'acquisto di libri per gli alunni poveri. Il Comune che dovrebbe provvedere (per obbligo di legge) i libri agli alunni delle classi inferiori, estenda il beneficio anche a quelli delle classi superiori (4^a e 5^a) almeno coi libri di testo.

9) Il Comune faccia pratiche perché allo stesso scopo sia devoluto il denaro destinato ai premi, dato da alcuni privati.

10) Sia fatto obbligo ad ogni iscritto di versare alla rispettiva Direzione un deposito:

di 2 lire, se appartenenti alle prime tre classi;

di 3 lire, “ “ 4^a classe

di 4 lire, “ “ 5^a classe

che saranno integralmente restituiti a fine d'anno.

11) Tale deposito dovrebbe versarsi nel 1° mese di scuola, in quattro rate settimanali; e non verrebbe restituito agli scolari che ebbero sui giorni di scuola 1/5 di assenze non giustificate e che non si presentarono ai due esami trimestrale e finale.

12) Il deposito sarà restituito a chi lascia la scuola per constatata malattia e per ragioni imprescindibili e provate di occupazioni.

14) I depositi non restituiti, e gli interessi maturati sulle quote versate saranno devoluti all'acquisto di libri per i poveri.

Nello stendere questa relazione il Mariani non s'è occupato dei Programmi e dei Metodi. E con ciò intese di riuscir più pratico prendendo le Scuole come sono, non come potrebbero operare nel desiderio di noi tutti. S'è preoccupato solo di trovar quegli espedienti che la lunga esperienza gli hanno suggerito essere i più acconci di ovviare in oggi alla grande diserzione degli scolari.

Inoltre egli è di parere che le attuali scuole serali non sono scuole professionali, ma scuole complementari per gli adulti; quindi vi devono vigere gli stessi programmi che per quelle diurne.

Non ha tenuto parola dei metodi di disciplina, poiché egli non si crede da tanto, ne pretende aver tale autorità di suggerire ai colleghi norme disciplinari.

Il Presid. apre la discussione sulla relaz. Mariani.

Si decide prima di trattare la questione in generale, poi di procedere alla discussione particolareggiata, capitolo per capitolo.

Piazza desidera che non si incagli il libero accesso alla scuola. Certe misure di controllo proposte dal Relatore gli sembrano portare ad un esito opposto al voluto. Tutto ciò che ha carattere inquisitoriale (d'informazione) egli lo vorrebbe tolto.

D'altra parte trova buone e pratiche alcune altre proposte.

Mor è d'accordo, nel complesso, coi criteri del Mariani. Si riserva nella disanima particolare dei capitoli, di confutarne qualcuno. Propone però che alla Relaz. si faccia precedere un desideratum nel quale si manifesti il desiderio che le Scuole serali vengano ad essere riformate così da divenire Scuole complementari.

Biraghi trova buona ma troppo vaga la proposta del Mor. Vorrebbe si indicasse ai programmi.

Piazza trova inutile quanto suggeriscono Mor e Biraghi. Egli crede che più popolare di così, la scuola serale non può essere. Non si può pensare alle scuole professionali se prima non s'è addestrato il giovanetto operaio sul leggere e sullo scrivere.

Malnati dopo aver osservato che questa discussione si fa troppo generale e ci si allontana dal nostro scopo, propone che si passi senz'altro e discutere l'Ordine del giorno puro e semplice.

Anche la maggioranza è di questo parere, perciò il Presidente pone in discussione capitolo per capitolo la Relaz. Mariani.

Comma a): *Non si inserivano alunni che nell'anno precedente non abbiano terminato il corso senza giustificato motivo o che ebbero un numero tale di assenze da rendere inefficace il loro intervento alla Scuola. Saranno però iscritti se, chiuso il periodo d'iscrizione, gli scolari della classe a cui aspirano, non avranno raggiunto il numero di 50 per ciascun maestro.*

Mor vuole che non si faccia questa distinzione e cita esempi che potrebbero portare a conseguenze non desiderate.

Così la pensa Piazza.

Mariani giustifica la sua proposta. L'esperienza gli ha fatto conoscere che pur troppo ci sono allievi i quali vengono alla scuola non per profittare ma per portarvi il disordine. Per questi a nulla valgono gli ammonimenti e i castighi. Occorrono mezzi più energici. Egli non li esclude affatto dalla scuola, solo li pospone agli altri: egli crede che questa misura valga a ravvederne qualcuno.

Formigoni, colla sunta anche di esempi, ribatte Piazza, Biraghi e Mor e appoggia Mariani.

Pigliano poi la parola in diverso senso, altri oratori fra i quali Pizzen, Maffi e Piazza; ma ancor prima che si venga ad una determinazione sul primo comma, Mariani, vedendo che la sala si spopola, invita l'Assemblea di soprassedere a questa questione, per passare a quell'altra più urgente, se si debba cioè, partecipare ufficialmente e come al futuro Congresso Magistrale italiano.

Ma appena aperta la discussione la Signora Malnati, vista l'ora tarda, il numero limitato dei presenti e considerato anche che si fa a tempo fino al prossimo giovedì a decidere circa il Congresso, propone di rimandare a quest'altro giorno la continuazione delle avviate discussioni.

L'assemblea approva, e la Seduta è tolta.

Il Segret.º I. Gelmi

Adunanza del 14 giugno 1894

Presenti i Soci: Celsi, R. Moroni, Freguglia, Contavalli, Quarello, Moro, Mariani, Gelmi, Clerici, C. A. Mor, Besana, Ferrario, Piazza, Merlini, Croce, Formigoni, Crivelli, Mantegari, Ferrari, Martinengo, Malnati, Biraghi, Canevaro, Crivelli.

È letto ed approvato il verbale dell'ultima seduta. – Presidente Ferrario.

Vien accettata la proposta di alcuni soci, di dar la precedenza, nella discussione, alla Relazione dei Revisori dei conti.

Biraghi, relatore, legge la Relazione che viene approvata a pieni voti. Domanda se il Comitato direttivo prenderà in considerazione il desiderio da lui manifestato d'apportare alcune modificaz. allo Statuto.

Il Comitato risponde che non ha nessuna difficoltà ad accogliere e portare in Assemblea proposte di modificazioni allo Statuto; ma ciò naturalmente si farà sul principio di quest'altr'anno scol.º

Su invito della Maggioranza, il Presidente mette in discussione la questione del Congresso.

Malnati prende la parola per spiegare come il Comitato ha portato in Assemblea la Proposta all'ordine del giorno, relativa al congresso.

Ferrari, dopo aver fatto precedere una questione sulle Commissioni già nominate per studiare i temi, il cui lavoro potrebbe essere stato inutile, giacché ancora non si è deciso di partecipare al Congresso, propone di aderire al medesimo e di concorrervi pecuniariamente; invita perciò l'Assemblea a decidere se e con quali mezzi intende aderire.

Mariani gli risponde spiegando il perché il Comitato nominato le Commissioni, le quali sono state fatte nell'intento di studiare attentamente i tre temi proposti dalla Magistrale e portare in Assemblea le conclusioni, cosicché nel caso si partecipi, abbiamo già il lavoro fatto. – Anche il Comitato – seguita il Mariani – è del parere del Ferrari di concorrere pecuniariamente e di far adesione al Congresso, ma non solo: intende anche presentare a nome della Sezione un proprio tema. Il tema è già stato discusso e scelto in seno al Comitato ed è questo: I maestri e le Camere del lavoro. Naturalmente, i nostri delegati sviluppandolo hanno modo di portare al Congresso tutta la ns. bandiera e dispiegarvela.

Biraghi approva in massima la proposta del comitato. Teme non venga accettato il ns. Tema, così com'è, perché troverà una forte opposizione. Conclude proponendo di non partecipare ufficialmente al congresso se mai ci venisse rifiutato.

Merlin[i] è con Biraghi. Risponde poi al Ferrari circa la nomina della Commissione. Anche se non si partecipasse al Congresso il lavoro fatto dalle Commissioni varrà pur sempre come studio e preparazione per andarvi privatamente a discutere i temi.

Piazza non crede ai timori di Biraghi. È un offendere il Comitato organizzatore del Congresso, il supporre si rifiuterà il ns tema per le ragioni addotte. Se lo rifiutano lo faranno perché riuscirà contrario alle loro vedute e non ne vorranno sapere affatto.

Conclude proponendo la partecipazione incondizionata.

Mor del Comitato organizzatore del Congresso, parla mettendo avanti la sua opinione personale. Difficilmente verrà accettato il ns tema. Però, cacciati dalla porta, potremo entrare per la finestra, a proposito di un tema proposto dai Maestri rurali.

Malnati risponde a certe asserzioni del Biraghi, il quale si ostina a dire che noi della Camera del Lavoro si vuol fare della politica. Ella come membro del Comitato della

Sezione e della Commissione Esecutiva, ha il dovere di smentire queste dicerie. Mai la ns sezione trattò in Assemblea questioni politiche; lei per la prima vi si sarebbe opposta in ossequio appunto ad una disposizione tassativa dello Statuto generale della Camera, che assolutamente non permette discussioni politiche e religiose.

Il Presidente riassume i criteri svolti dai diversi oratori, dice che la questione è matura, e perciò propone questo ordine del giorno, compilato da lui e Biraghi:

La Sez. Maestre e Maestri della Camera del lavoro, delibera di prendere parte ufficialmente al Congresso dei Maestri.

Mariani, dimostrando la necessità di partecipare ufficialmente, perché si possa aver libertà di domandare e avere la parola, appoggia l'ordine del giorno presentato; il quale messo ai voti viene approvato.

Dipoi si passa ai modi di concorrere.

1°) Scelta dei delegati rappresentanti la Sezione al Congresso. – Dietro proposta di alcuni Soci l'Assemblea incarica il Comitato perché abbia lui a scegliere fra i Colleghi quelli a cui si possa affidare tale incarico.

2°) Se si debba concorrere pecuniariamente.

Prendono diversi la parola. Si vorrebbe da alcuni che la Sez. desse quanto più può; altri son pur disposti a concorrere, purché il Congresso non dipenda da Autorità. Visto però che la Sez. deve sostenere non lievi spese per la pubblicazione degli opuscoli e per la propaganda in campagna, la maggioranza viene del parere di limitare il ns. concorso pecuniario alla somma di 25 lire.

3°) Tema da proporsi.

Piazza appoggia il tema proposto dal Comitato.

Formigoni desidera che il tema proposto venga messo in votazione senza discussione, perché gli pare il meglio rispondente ai ns. desideri.

Ferrari non vuole che si concorra con tema ns, specie quello proposto perché per i Maestri di campagna, è uno spauracchio che li terrà lontani.

Mariani, parla contro Ferrari per dimostrare l'opportunità di portare un ns tema nel congresso. La Camera del lavoro non è ambiente politico, ma umanitario, quindi non deve spaurire nessuno, anzi risvegliare tutti quelli di buona volontà a unirsi a noi.

Ferrari insiste nel proporre di non partecipare con tema proprio. Ma la sua proposta è respinta e viene invece approvata l'altra di concorrere col tema presentato dalla Commissione.

Dopodichè si toglie la seduta.

I. Gelmi Segr.°

Adunanza del 10 Luglio 1894

Presenti i Soci: Mariani, Teotti, Merlin[i], Biraghi, Ferrari, Ferrario, Piazza, Locatelli Camilla, Rossi, Mantegari, Clerici, Zanoletti, Martinengo, Steffanoli, Croce, Vismara, Moroni Rosa, Besana, Donnes, Celsi, Az[z]imonti, Moro, Crivelli, Gelmi. – Presid.^a Teotti.

È letto ed approvato il verbale dell'ultima seduta.

L'ordine del giorno reca:

Comunicazioni – Ancora della partecipazione al Congresso – Continuaz. della discussione iniziata sulle scuole serali.

Vengono comunicate le pratiche fatte, purtroppo sortite infruttuose, presso la Giunta Municipale per la soppressione della forma pubblica degli esami finali nelle scuole elementari.

Ferrario domanda che esito ha avuto la ns. domanda sul Rapporto finale dei Direttori.

E siccome il Comitato dichiara di non aver avuto ancora nessuna risposta, Ferrario e Biraghi insistono perché la domanda, chiedente la pubblicità delle Relazioni finali dei direttori, sia rinnovata.

Piazza fa anche questa proposta: che si insista presso la Soprintendenza perché faccia pubbliche le Relaz. segrete degli esaminatori alle Scuole del Comune.

Vien data lettura della Lettera della Commissione organizzatrice del congresso, col-la quale si annunzia che il ns tema non è stato accettato e che i tre temi già stati dalla Magistrale proposti, vennero sostituiti da altri.

Ferrario udite le comunicazioni della Commissione del Congresso, si compiace che il ns. contributo che s'era stabilito di versare, non sia ancora stato sborsato. Propone di non concorrere in nessun modo.

Ferrari è d'accordo con Ferrario nello stigmatizzare la soluzione della Commissione organizzatrice, ma non crede sia opportuno, non lodevole, ritirare il ns. sussidio già stato votato.

Piazza trova che sarebbe errore il non partecipare lo stesso al Congresso. Nei temi stati scelti, per quanto sieno circoscritti e fatti sul medesimo stampo dei soliti proposti in tutti i congressi, pure egli trova sempre la possibilità di poter svolgere le nostre idee.

Ferrario insiste in quanto ha detto.

Mariani è d'accordo col Piazza e non col Ferrario. Non è soddisfatto per niente della risposta della Commissione, la quale escludendo il ns. tema, vorrà certo impedirci di svolgere le ns. idee in altri.

Lamenta anche che si siano cambiati, dopo due mesi di studio per noi, i temi proposti da principio. Vorrebbe scrivere alla Commissione, dichiarandosi punto soddisfatto.

Riguardo al concorso pecuniario è di parere che lo si debba mantenere lo stesso, sia perché parrebbe in noi un atto di piccineria e di vendetta, sia per non contraddire ad una deliberazione già presa.

Biraghi è anche lui del parere di non passar sopra ad una deliberazione già presa. Non ha nessuna fiducia nel Congresso, e propone che nei giorni in cui lo si tiene, qui da noi si indica una Conferenza di propaganda.

Donnes si oppone a quest'ultima proposta del Biraghi, perché non si farebbe che aumentare la discordia che già regna tra maestri.

Il Presidente è del parere che si accettino le cose come sono, andando al Congresso a discutere i temi proposti.

Ferrario propone un ordine del giorno nel quale è detto che non avendo noi un ns. tema, e non avendo quindi libertà di parola, è bene il non partecipare ufficialmente al Congresso.

Piazza parla per dimostrare l'opportunità di partecipare ufficialmente.

Mariani dice che la Circolare ricevuta, dimostra che gli organizzatori del Congresso non hanno un ordine d'idee precise; d'altra parte non s'avrebbe tempo di fare uno studio diligente di nuovi temi. Conclude colla proposta di non partecipare ufficialmente.

Ferrari ricorda che abbiamo deciso d'intervenire in altra seduta. Fin da allora si sapeva già che ci poteva essere rifiutato il ns. tema e che i temi da principio proposti potevano essere sostituiti. Dunque non trova ragione per ritirarsi.

Dopo altro po' di discussione si mette ai voti l'ordine del giorno Ferrario che è approvato.

Di poi, per l'ora tarda, si delibera di rimandare ad altra seduta la discussione sull'avviamento delle scuole serali.

Il Segr.º I. Gelmi

(continua...)

Fascismo, cultura e università in un importante discorso di Giuseppe Bottai (1928)

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Fascism, culture and university in an important speech by Giuseppe Bottai (1928)

ABSTRACT: The paper analyzes the contents of the inaugural speech given by Giuseppe Bottai, undersecretary of the Ministry of Corporations, at the University of Macerata on 11th November 1928. In this text the fascist intellectual underlined the close relationship that should exist between fascism and culture. According to Bottai it was necessary to re-examine the role that Italian universities should play in their quality of real places of education as well as new processing centers of culture.

EET/TEE KEYWORDS: University; Fascism; Education System; Ideology; Culture; Italy; XX Century.

L'11 novembre 1928 Giuseppe Bottai¹, intellettuale di spicco del regime fascista nonché, all'epoca, sottosegretario di Stato al ministero delle

¹ Per un approfondimento della biografia e del contributo ideologico, politico e culturale fornito da Giuseppe Bottai si rinvia innanzitutto ai documenti dell'*Archivio personale Giuseppe Bottai* conservati presso la Fondazione Arnoldo e Alberto Mondadori (Milano); nonché al *Fascicolo Giuseppe Bottai* presente in ACS, Archivi fascisti, Segreteria particolare del Duce (1922-1943); ACS, Archivi fascisti, Direttorio Nazionale, Segreteria politica; ACS, Ministero dell'Educazione Nazionale (1929-1944), Gabinetto (1839-1943); ACS, Ministero delle Corporazioni (1926-1943), Gabinetto (1926-1959). Si vedano inoltre: G. Bottai, *Vent'anni e un giorno: 24 luglio 1943*, Milano, Garzanti, 1949; R. De Felice, *Storia degli ebrei sotto il fascismo*, Torino, Einaudi, 1961, pp. 531-598; A. Aquarone, *L'organizzazione dello Stato totalitario*, Torino, Einaudi, 1965, pp. 137-212; S. Cassese, *Un programmatore degli anni Trenta: Giuseppe Bottai*, «Politica del diritto», vol. 1, n. 3, 1970, pp. 404-447; Id., *Bottai, Giuseppe*, in *Dizionario biografico degli italiani*,

Corporazioni², fu invitato a tenere il discorso celebrativo in occasione della solenne inaugurazione dell'anno accademico 1928-1929 presso la Regia Università di Macerata³. In ragione dell'antica amicizia che lo legava all'allora rettore Arnaldo De Valles⁴ Bottai aveva accolto con entusiasmo, fin dal mese di settembre⁵, l'invito rivoltogli da quest'ultimo a svolgere l'intervento ufficiale solitamente affidato ad un professore di ruolo dell'Ateneo⁶. Per l'occasione Bottai

Roma, Istituto della enciclopedia italiana, 1971, Vol. XIII, pp. 389-404; G.B. Guerri, *Giuseppe Bottai, un fascista critico*, Milano, Feltrinelli, 1976; A.J. De Grand, *Bottai e la cultura fascista*, Roma-Bari, Laterza, 1978; G. Bottai, *Diario 1935-1944*, a cura di G.B. Guerri, Milano, Rizzoli, 1982; M. Galfré, *Giuseppe Bottai. Un intellettuale fascista*, Firenze, Giunti, 2000. Per quanto concerne l'operato di Giuseppe Bottai in qualità di ministro dell'Educazione Nazionale si rinvia a: Ministero dell'Educazione Nazionale, *Dalla Riforma Gentile alla Carta della Scuola*, Firenze, Vallecchi, 1942; P. Nello, *Mussolini e Bottai: due modi diversi di concepire l'educazione fascista della gioventù*, «Storia Contemporanea», vol. 7, n. 2, 1977, pp. 335-366; R. Gentili, *Giuseppe Bottai e la riforma fascista della scuola*, Firenze, La Nuova Italia, 1979; J. Charnitzky, *Fascismo e scuola. La politica scolastica del regime (1922-1943)*, Firenze, La Nuova Italia, 1994, pp. 440-483; G. Ricuperati, *Per una storia dell'università italiana da Gentile a Bottai: appunti e discussioni*, in I. Porciani (ed.), *L'Università tra Otto e Novecento: i modelli europei e il caso italiano*, Napoli, Jovene Editore, 1994, pp. 311-377; A. Ascenzi, R. Sani (edd.), *Il libro per la scuola nel ventennio fascista. La normativa sui libri di testo dalla riforma Gentile alla fine della seconda guerra mondiale (1923-1945)*, Macerata, Alfabetica Edizioni, 2009, pp. 17-38.

² Dal 6 novembre 1926 al 12 settembre 1929 Giuseppe Bottai fu sottosegretario di Stato al ministero delle Corporazioni, dicastero istituito con R.D. del 2 luglio 1926 e che Mussolini assunse in prima persona. Bottai fu poi titolare dello stesso dicastero fino al 20 luglio 1932, data in cui il Duce decise di riassumere direttamente la responsabilità della politica corporativa.

³ *Fascismo e Cultura. Discorso inaugurale detto da S.E. l'On. Giuseppe Bottai Sottosegretario di Stato al Ministero delle Corporazioni l'11 novembre 1928*, «Annuario della Regia Università degli Studi di Macerata per l'Anno Accademico 1928-1929. Anno VII dell'Era Fascista. Dalle Origini Anno DCXXXVII», 1929, pp. 17-21.

⁴ In realtà, il prof. Arnaldo De Valles ricoprì l'incarico di prorettore vicario dal 15 dicembre 1927 al 14 gennaio 1929 e, in tale veste, esercitò le funzioni di governo dell'Ateneo maceratese. Solo a partire dal 15 gennaio 1929 assunse ufficialmente l'ufficio di rettore della Regia Università di Macerata. Per un profilo biografico e accademico di De Valles e per ulteriori notizie sul suo mandato rettorale si rimanda a L. Pomante (ed.), *L'Università di Macerata nell'Italia unita (1861-1966). Un secolo di storia dell'ateneo maceratese attraverso le relazioni inaugurali dei rettori e altre fonti archivistiche e a stampa*, Macerata, eum, 2012, pp. 549-566.

⁵ Si veda a tal proposito lo scambio epistolare intercorso nei mesi di settembre ed ottobre tra il rettore dell'Ateneo maceratese Arnaldo De Valles ed il sottosegretario Giuseppe Bottai costituito complessivamente da due lettere e due telegrammi conservati in Archivio di Stato di Macerata (in seguito ASMc), Archivio comunale, cat. 9 (Educazione Nazionale), clas. 7 (Università), 1919-1930, b. 3474 e in Archivio dell'Università degli Studi di Macerata (in seguito AUMc), Facoltà giuridica, Personale, f. De Valles Arnaldo.

⁶ Anche successivamente, negli anni che seguirono, Giuseppe Bottai mantenne ottime relazioni con i vertici dell'ateneo, non mancando di sostenere con cospicui finanziamenti ministeriali le iniziative da esso promosse nel campo della promozione degli studi corporativi. I rapporti, com'è comprensibile, si intensificarono all'indomani della nomina dell'esponente fascista alla guida del ministero dell'Educazione Nazionale (1936), anche in ragione dell'ottimo rapporto esistente tra Bottai e l'allora rettore Enrico Bassanelli. Si veda al riguardo il carteggio conservato in AUMc, Facoltà giuridica, Personale, f. Bassanelli Enrico. In ASMc, Archivio comunale, cat. 9 (Educazione Nazionale), clas. 7 (Università), 1941-1953, bb. 3476-3477, inoltre, sono presenti alcuni documenti dell'amministrazione comunale che fanno riferimento ai diversi incontri e agli accordi stabiliti,

presentò alla numerosa platea, composta da autorità locali, docenti e studenti e riunita nell'antica Aula Magna dell'Ateneo, un intervento politicamente molto impegnativo dal titolo *Fascismo e Cultura*⁷, alle cui idee di fondo egli si sarebbe mantenuto fedele anche successivamente, tanto da riproporle a più riprese fino alla caduta del regime.

In un discorso emotivamente intenso, sorretto da una scrittura chiara e lineare e da un'abile *ars oratoria*, colui che sarebbe divenuto di lì a poco docente universitario presso l'Università di Pisa⁸ sottolineava la necessità di riflettere «sui rapporti sempre più vivi, più assidui e, mi auguro, più fecondi, che si vanno creando fra gli uomini del Fascismo e le Università italiane»⁹ nel tentativo di riuscire ad instaurare un rapporto organico e profondo tra il fascismo e la cultura. Secondo Bottai, infatti, appariva ormai irrinunciabile una compenetrazione tra il regime fascista e il mondo della formazione superiore e delle università.

Nel suo discorso maceratese, il sottosegretario fascista investiva di fatto le università di un ruolo cardine in quel rinnovamento politico e sociale che egli auspicava per il Paese. Nelle università, considerate centri «di formazione, di propulsione e di irradiazione»¹⁰ della cultura, si sarebbero formate le nuove classi dirigenti, quella élite che avrebbe guidato la società e garantito al fascismo una duratura esistenza. Fin dal 1928, pertanto, con diversi anni di anticipo rispetto alla sua ascesa alla guida del ministero dell'Educazione Nazionale¹¹

nei primi mesi del 1940, tra i rettori dell'ateneo (rispettivamente Enrico Bassanelli e Costantino Mortati) e il ministro dell'Educazione Nazionale Giuseppe Bottai per l'istituzione a Macerata di una seconda facoltà accanto a quella 'storica' di Giurisprudenza. Per ulteriori approfondimenti sulla vicenda si veda L. Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, Macerata, eum, 2013, pp. 350-358.

⁷ I quotidiani del tempo dedicarono ampio spazio alla visita di Giuseppe Bottai a Macerata svoltasi l'11 novembre. Nel corso della giornata, il sottosegretario Bottai inaugurò alcune delle opere del regime nella cittadina marchigiana: la Casa del Fascio, il nuovo edificio destinato ad accogliere gli uffici postali, il reparto fisioterapico dell'Ospedale Civile, il campo sportivo della Vittoria, la nuova centrale telefonica, le case per gli impiegati comunali e l'asilo «La Pietà». La sera di quello stesso giorno, come ricordato, Bottai intervenne alla solenne inaugurazione dell'anno accademico della Regia Università di Macerata, alla quale presero parte autorità civili, religiose e militari provenienti dall'intero territorio marchigiano. Il giorno successivo Bottai visitò altre località della provincia maceratese ed in particolare Porto Civitanova dove ebbe modo di inaugurare altre strutture volute dal regime. Si vedano al riguardo gli ampi resoconti giornalistici apparsi sul «Corriere Adriatico» del 9, 13, 14 e 15 novembre 1928.

⁸ Giuseppe Bottai fu nominato «per chiara fama» professore di Politica ed economia corporativa all'Università degli Studi di Pisa nel 1930 (l'anno successivo sarebbe passato sulla cattedra di Diritto corporativo). Presso il medesimo ateneo costituì, nello stesso anno, la «Scuola di perfezionamento di Scienze Corporative», che egli stesso diresse dal 1932 al 1935.

⁹ Cfr. *Fascismo e Cultura. Discorso inaugurale detto da S.E. l'On. Giuseppe Bottai Sottosegretario di Stato al Ministero delle Corporazioni l'11 novembre 1928*, cit., p. 17.

¹⁰ *Ibid.*

¹¹ Bottai divenne ministro dell'Educazione Nazionale il 22 novembre 1936 sostituendo Cesare Maria De Vecchi.

e alla successiva stesura della *Carta della Scuola*¹², il tema della formazione della nuova classe dirigente costituiva il punto nevralgico della riflessione di Bottai. Davanti all'uditorio dell'ateneo marchigiano egli asseriva che la funzione primaria delle università all'interno del regime fascista fosse quella di fornire una «cultura viva, creatrice d'una classe di uomini atta a dirigere, nella politica, nella scienza, nell'arte». Le aule universitarie, pertanto, avrebbero dovuto divenire fucine della nuova classe politica fascista, illuminata da solide base culturali e che riconosceva nell'ideologia fascista del fascismo il principio animatore «di ogni ordine di studi». Bottai, dunque, rifiutava categoricamente l'idea di una realtà universitaria che fosse una «specie di campo trincerato, di compartimento stagno o di ermetico laboratorio, dove, in alambicchi interiori, si distillino formule vane e sterili», sostenendo che mai l'Università, nella sua plurisecolare storia era stata «staccata, avulsa, assente dal suo tempo»¹³. Gli atenei italiani, infatti, nel loro costante processo di sviluppo, avevano naturalmente aderito alle condizioni politiche ed intellettuali del loro tempo e proprio per tale ragione erano ora chiamati a conformarsi integralmente agli orientamenti e indirizzi del nuovo Stato fascista.

Al riguardo, occorre sottolineare che quella affermata da Bottai non era una semplice volontà di «fascistizzazione» del sistema universitario italiano, quanto piuttosto l'aspirazione a ridefinire in forme nuove il ruolo stesso degli atenei della penisola come luoghi di formazione e di elaborazione della cultura e della scienza. Questo obiettivo poteva essere raggiunto senza che le università si piegassero «alle finalità particolari e agli interessi contingenti degli uomini, con apologie ed esaltazioni di falsi valori», ma con il solo impegno morale di volgere comunque «gli occhi fissi alle nuove ideali verità, sorte dal sacrificio d'una generazione»¹⁴. Ciò che stava particolarmente a cuore al sottosegretario fascista era, infatti, da un lato il rifiuto categorico di una cultura che esprimesse solo l'intento propagandistico di bassa lega del regime o ridotta a una sterile serie di formule, dall'altro il tentativo di generare un nuovo modo di intendere la cultura, la quale doveva risultare viva e investita di un ambizioso compito

¹² La *Carta della Scuola* fu presentata al Gran Consiglio del Fascismo il 19 gennaio 1939 e da questo approvata e promulgata il 15 febbraio dello stesso anno. La *Carta della Scuola*, vero e proprio «piano regolatore» del nuovo ordinamento scolastico fascista, avrebbe dovuto essere seguita, nelle intenzioni di Bottai, dai provvedimenti di legge destinati ad attuare i principi in essa enunciati. In realtà, il coinvolgimento di lì a poco dell'Italia fascista nel secondo conflitto mondiale, le crescenti difficoltà belliche e, infine, la caduta del fascismo il 25 luglio 1943 impedirono la realizzazione di tale progetto. L'unico provvedimento che Bottai riuscì a portare a compimento fu quello relativo al riordinamento della scuola dagli 11 ai 14 anni, con l'istituzione della media unica (Legge 1° luglio 1940, n. 899) e il varo dei relativi programmi didattici (R.D. 30 luglio 1940, n. 1174). Per il testo integrale della Carta della Scuola si veda: G. Bottai, *La Carta della Scuola*, Milano, Mondadori, 1939.

¹³ Cfr. *Fascismo e Cultura. Discorso inaugurale detto da S.E. l'On. Giuseppe Bottai Sottosegretario di Stato al Ministero delle Corporazioni l'11 novembre 1928*, cit., p. 18.

¹⁴ *Ibid.*, p. 21.

formativo. Bottai infatti, come efficacemente sottolineato da Alexander J. De Grand, era consapevole che il fascismo violento delle squadre aveva determinato un vuoto culturale che sarebbe stato rapidamente colmato dalla cultura conservatrice, se non l'avesse fatto qualche energia nuova proveniente dall'interno del movimento stesso¹⁵. Il processo di creazione di una nuova cultura fascista avrebbe però dovuto fronteggiare attacchi provenienti da più fronti: quelli mossi dalla cultura tradizionale precedente al fascismo, quelli portati dalla vecchia opposizione culturale antifascista ed anche quelli riconducibili ad elementi interni al fascismo stesso che apparivano ostili ad ogni sforzo culturale superiore alla semplice propaganda e che per questo risultavano ancora più temibili.

Secondo Bottai, infatti, erano particolarmente pericolosi quei fascisti che si presentano come «uomini cosiddetti d'azione, tutti muscoli, tutti nervi, tutti fegato, che temono che il Fascismo, bazzicando le aule universitarie, perda il suo vigor pratico e la sua energia creatrice di fatti»¹⁶. A costoro, l'esponente del regime obiettava che era quanto mai urgente e necessario superare l'assurda antitesi con la quale si tentava di generare un contrasto, in realtà inesistente, tra «Fascismo-azione e Fascismo cultura». Pur riconoscendo al fascismo il suo carattere pratico ed il merito di aver reagito con vigore ad una situazione politica insostenibile qual era quella creatasi nel primo dopoguerra, Bottai si mostrava persuaso, infatti, che il fascismo non potesse essere considerato come sola «azione», ma, per converso, come un vero e proprio «atto meditato», capace di fondare le proprie ragioni e, soprattutto, la propria azione su solidi fondamenti culturali. Nel discorso pronunciato all'Università di Macerata, infatti, egli se da un lato sottolineava come per i «fascisti le teorie, in politica come in ogni altro campo, non sono che stromenti di lavoro, fili conduttori, grandi linee direttrici di marcia»; dall'altro non mancava di rilevare, tuttavia, che «solo un pensiero unitario, solo un'ordinata cultura possono stabilire i rapporti e le connessioni necessarie a dare alla politica d'una classe dirigente un respiro di politica nazionale»¹⁷. Una stretta relazione esisteva, pertanto, tra cultura e politica, tra pensiero e azione, senza alcun plausibile contrasto tra due elementi che invece avrebbero soltanto dovuto interagire. Secondo Bottai una grande politica altro non era che «un metodo di pensare, di studiare, di predisporre e di ordinare i rapporti tra i valori, ponderabili e imponderabili, che si agitano nella vita di un popolo». Per questa ragione, dunque, il «Fascismo-cultura» si integrava e non negava il «Fascismo-azione», quale fondamento imprescindibile del «Fascismo-Stato». Davanti alla necessità di procedere alla formazione di

¹⁵ Si veda De Grand, *Bottai e la cultura fascista*, cit., pp. 250-251.

¹⁶ Cfr. *Fascismo e Cultura. Discorso inaugurale detto da S.E. l'On. Giuseppe Bottai Sottosegretario di Stato al Ministero delle Corporazioni l'11 novembre 1928*, cit., p. 18.

¹⁷ *Ibid.*, pp. 19-20.

una nuova cultura fascista, occorre rifiutare pericolose demagogie e facili «incitamenti all'incultura», assolutamente infruttuosi e colpevoli di avere, già in epoche passate, «devastate anime e coscienze»¹⁸.

Dalle argomentazioni usate appare evidente come Bottai assegnasse, già sul finire degli anni Venti, un ruolo primario alla cultura nel tentativo di dare una rigorosa base teorica al regime fascista e un solido fondamento dottrinale alla formazione etico-politica della gioventù italiana chiamata a costituire la futura classe dirigente fascista¹⁹.

Al tempo del suo intervento nell'Aula Magna dell'Università di Macerata, il giovane intellettuale e politico fascista²⁰ mostrava, dunque, di avere già le idee ben chiare su quale dovesse essere il ruolo da attribuire alla realtà accademica italiana, opportunamente rinnovata dall'abbraccio con l'ideologia fascista nella formazione delle nuove generazioni. In realtà, i principi e le direttive espressi nel discorso pronunciato a Macerata erano destinati a costituire per Bottai una sorta di 'manifesto programmatico', al quale egli si sarebbe mantenuto fedele anche nella fase successiva. Basti pensare che, esattamente due giorni dopo il discorso maceratese, il 13 novembre 1928, Bottai pronunciò un intervento pressoché identico all'Università degli Studi di Pisa, in occasione del ricevimento della laurea *ad honorem* in Diritto corporativo. Il discorso maceratese, peraltro, sarebbe stato pubblicato con poche varianti formali e con notevole rilievo, nel dicembre dello stesso anno, su «Critica Fascista»²¹, il quindicinale di cultura politica fondato e diretto dallo stesso Bottai, a conferma dell'indubbia rilevanza che il sottosegretario alle Corporazioni attribuiva ad esso.

Divenuto ministro dell'Educazione Nazionale nel 1936, seppur con occhio attento all'evoluzione ideologica e politica del fascismo, Bottai mantenne fermi i capisaldi del suo pensiero e, in più occasioni, tornò a riproporre i concetti chiave già espressi nel discorso maceratese del 1928. Da quell'intervento erano ormai trascorsi quasi dieci anni ma la *ratio* che allora aveva animato le parole di Bottai non era affatto mutata. Lo si evince dall'analisi di alcuni importanti documenti della fine degli anni Trenta, quando ormai il totalitarismo fascista aveva assunto connotati sempre più esasperati e gli intenti di chi ricopriva

¹⁸ *Ibid.*, p. 20.

¹⁹ Per questa sua visione 'revisionista' della cultura Bottai si scontrò con gli esponenti più intransigenti del fascismo, tra i quali lo scrittore e giornalista Mino Maccari. Per ulteriori approfondimenti sull'argomento si veda Guerri, *Giuseppe Bottai, un fascista critico*, cit., pp. 179-180.

²⁰ Sin dalla sua ascesa al potere il fascismo aveva espresso la propria volontà di puntare sui giovani. Nel 1922, infatti, Mussolini aveva 39 anni, Italo Balbo 26, Giuseppe Bottai e Dino Grandi 27, Roberto Farinacci 30, Cesare Maria De Vecchi 38, Giovanni Gentile 47. Tra i 'quadrumviri' della marcia su Roma il più vecchio era Emilio Del Bono che aveva 56 anni. Per un'analisi della valenza ideologica e politica di una simile scelta compiuta dal regime si rinvia a Gentili, *Giuseppe Bottai e la riforma fascista della scuola*, cit., pp. 45-49.

²¹ Cfr. G. Bottai, *Fascismo e cultura*, «Critica Fascista», vol. 6, n. 23, 1° dicembre 1928, pp. 441-443.

ruoli politici di primo piano erano tutti indirizzati all'apologia del regime. Nel *Discorso pronunciato alla Camera fascista nella tornata del 17 marzo 1937 sul bilancio dell'Educazione Nazionale*²², a questo riguardo, Bottai si preoccupava di definire il ruolo dell'istruzione e tornava così ad asserire che la scuola prima e l'università in seguito sarebbero dovuti divenire i luoghi deputati alla formazione dell'«uomo nuovo, educandolo ad un concetto vivo e moderno della cultura e della vita». Gli Atenei italiani, dunque, erano nuovamente considerati come culla di una nuova cultura improntata agli ideali del regime e come veri e propri laboratori nei quali selezionare una classe dirigente integralmente fascista.

I contenuti del discorso tenuto a Macerata, comunque, erano destinati a trovare un'organica riproposizione in un discorso di Bottai alla radio del 7 gennaio 1938²³, nel quale egli, rivolgendosi alla «grande famiglia universitaria di docenti e studenti per parlare insieme [...] delle Università e di certi loro mali, che tutti conosciamo», ribadiva che «la Scuola, anche di grado universitario, abbia una funzione educatrice, formativa dei giovani». Molti passaggi dell'intervento radiofonico bottaiano mutuavano, sia nella forma che nella sostanza, i concetti più importanti espressi sul finire degli anni Venti a Macerata. A detta di Bottai, l'obiettivo formativo assegnato dal regime al sistema universitario italiano non era affatto mutato: «L'Università – egli affermava – deve selezionare, per formare i quadri futuri della vita politica, sociale, economica della Nazione e del Regime». A questo proposito, riferendosi alle università, non poteva essere trascurata l'intima connessione esistente tra la formazione essenzialmente scientifica e culturale e quella propriamente ideologica e politica, in quanto, notava il ministro dell'Educazione Nazionale, «Nazione e Regime [...] non possono dimenticare che, dietro il problema scientifico (cui, essenzialmente, guardano i professori), dietro il problema professionale (cui guardano gli studenti), c'è un problema politico», in quanto nulla interessa maggiormente la politica «che la formazione degli uomini in genere e della classe dirigente in ispecie».

Due mesi più tardi, nel marzo 1938²⁴, Bottai definiva le università «fucine della cultura» ed evidenziava come il rilassamento dell'insegnamento universitario rappresentasse «un male, che si ripercuote, crescendo d'intensità, su tutti gli ordini della Scuola» e che presto avrebbe potuto pesare anche sulla vita economica e politica del Paese. Del resto, come opportunamente sottolineato da Giordano Bruno Guerri, il tentativo di creare uno stretto legame

²² Cfr. Id., *Discorso pronunciato alla Camera fascista nella tornata del 17 marzo 1937 sul bilancio dell'Educazione Nazionale 1937-1938*, in Id., *La Carta della Scuola*, cit., pp. 93-110 (la citazione è a p. 96).

²³ G. Bottai, *Parole agli universitari. 7 gennaio 1938*, in Id., *La Carta della Scuola*, cit., pp. 196-199.

²⁴ Id., *Discorso pronunciato alla Camera fascista nella tornata del 10 marzo 1938 sul bilancio dell'Educazione Nazionale 1938-1939*, in Id., *La Carta della Scuola*, cit., pp. 126-134 (le citazioni sono alle pp. 129-130).

tra la formazione, il mondo del lavoro e il regime fascista era ormai da anni un punto nevralgico dell'azione politica di Bottai, il quale, sin dall'avvio della sua esperienza al ministero dell'Educazione Nazionale, aveva manifestato la volontà di rilanciare il disegno già perseguito negli anni precedenti al dicastero delle Corporazioni, ossia di promuovere una formazione scolastica e universitaria a misura della nuova organizzazione corporativa del lavoro e della produzione²⁵.

La progettualità e il riformismo scolastico e formativo di Bottai si concretizzarono, com'è noto, con l'emanazione della *Carta della Scuola*, la quale, approvata dal Gran Consiglio del Fascismo il 15 febbraio 1939, enucleava i principi fondamentali che avrebbero dovuto ispirare l'opera di riordinamento del sistema scolastico e universitario italiano. Analizzando taluni passaggi della *Carta* è possibile rintracciare numerosi elementi di contatto con le idee guida che avevano ispirato Bottai nel discorso maceratese del 1928. La *Carta*, infatti, si basava sul principio cardine secondo il quale la scuola e la cultura avrebbero dovuto costituire gli elementi basilari per il potenziamento dello Stato fascista. Significativo a tal proposito è quanto esposto già nella prima dichiarazione della *Carta*, secondo la quale «nell'unità morale, politica ed economica della Nazione italiana, che si realizza integralmente nello Stato fascista, la Scuola [...] forma la coscienza umana e politica delle nuove generazioni»²⁶. L'istruzione e la cultura, a questo riguardo, erano nuovamente riproposte come fondamentali ai fini della crescita umana, civile e soprattutto «politica» dei cittadini. Il concetto era ribadito con forza dallo stesso Bottai nella *Relazione al Duce sulla Carta della Scuola* dell'8 febbraio 1939²⁷, nella quale si ricordava come «la terza Dichiarazione definisce lo studio come formazione di maturità e di carattere, come formazione dell'uomo politico e guerriero del Fascismo; ne pone il fondamento nella effettiva capacità e nelle reali attitudini; ne apre a tutti la possibile continuazione, indipendentemente dalla condizione economica»²⁸. Il riconoscimento dello studio e di un solido bagaglio culturale quali componenti imprescindibili per la formazione di soggetti pienamente integrati nell'organizzazione sociale e politica creata dal regime fascista, che aveva rappresentato un tema assai caro a Bottai fin dal 1928, era ora riproposto con forza in occasione della presentazione delle idee-guida della *Carta della Scuola*.

All'istruzione superiore era dedicata, com'è noto, la XIX dichiarazione della *Carta della Scuola*. Dalla sua analisi appare evidente come, anche in questo caso, i concetti espressi mutuavano la loro *ratio* da quelle finalità che Bottai aveva attribuito chiaramente all'istruzione superiore nell'intervento del 1928:

²⁵ Si vedano sull'argomento Guerri, *Giuseppe Bottai, un fascista critico*, cit., pp. 133-146; De Grand, *Bottai e la cultura fascista*, cit., pp. 255-256.

²⁶ Bottai, *La Carta della Scuola*, cit., p. 75.

²⁷ Si veda G. Bottai, *Relazione al Duce sulla Carta della Scuola. 8 febbraio 1939*, in Id., *La Carta della Scuola*, cit., pp. 61-72 (la citazione è a p. 66).

²⁸ Gentili, *Giuseppe Bottai e la riforma fascista della scuola*, cit., pp. 71-73.

L'Università ha per fine di promuovere in un ordine di alta responsabilità politica e morale il progresso della scienza e di fornire la cultura scientifica necessaria per l'esercizio degli uffici e delle professioni. I corsi e le scuole di perfezionamento hanno caratteri e fini prettamente scientifici; i corsi e le scuole di specializzazione hanno finalità prevalentemente pratiche in rapporto a determinati rami di attività professionali. Addestramento sportivo-militare e pratica del lavoro concorrono alla formazione spirituale dei giovani²⁹.

La dichiarazione indicava le finalità culturali e professionali dell'università e delle scuole di perfezionamento e di specializzazione, rimanendo molto aderente alle tradizioni italiane, tanto da riprendere dalla legge Casati del 1859 la definizione della funzione universitaria («promuovere [...] il progresso della scienza e [...] fornire la cultura scientifica necessaria per l'esercizio degli uffici e delle professioni»)³⁰. Rispetto ai provvedimenti legislativi precedenti, però, la *Carta della Scuola* si soffermava a rimarcare il carattere formativo dell'insegnamento universitario principalmente sul piano politico e morale – ricordando altresì la funzione svolta, a questo fine, dall'«addestramento sportivo-militare» e dalla «pratica del lavoro» poiché il regime esigeva professionisti di livello, culturalmente e politicamente preparati e, in ogni caso, sempre in linea con le direttive che arrivavano dall'alto.

Giuseppe Bottai, da taluni ritenuto «interprete dell'anima colta del fascismo»³¹, aveva dunque sostenuto sin dagli anni del discorso maceratese l'esigenza impellente di formare una nuova generazione al potere e si era mostrato tenace sostenitore di un rinnovamento della società italiana, che doveva avere nella scuola e soprattutto nell'istituzione universitaria i suoi punti di forza. Questa sua concezione, espressa nell'Aula Magna dell'Università di Macerata quando egli era ancora agli inizi della carriera politica, ispirò costantemente il pensiero del gerarca fascista, definito da Alexandre J. De Grand un «modernizzatore di tipo conservatore»³². Anche nella *Carta della Scuola*, momento conclusivo e concreto della sua speculazione, egli aveva cercato infatti di far rifluire gli elementi cardine della sua riflessione giovanile. Nel 1939, tuttavia, la situazione risultava ormai già irrimediabilmente compromessa, il tempo della rivoluzione

²⁹ Bottai, *La Carta della Scuola*, cit., pp. 83-84.

³⁰ Sui contenuti della legge Casati e, in particolare, sulle disposizioni e i regolamenti relativi all'istruzione superiore e universitaria, oltre al sempre utile *Vicende legislative della Pubblica Istruzione in Italia dall'anno 1859 al 1899 raccolte e annotate da Giuseppe Saredo. Introduzione al Codice della Pubblica Istruzione dello stesso Autore*, Torino, Unione Tipografico-Editrice, 1901, pp. 1-10 e 36-38, si vedano ora: S. Polenghi, *La politica universitaria italiana nell'età della Destra storica (1848-1876)*, Brescia, La Scuola, 1993, pp. 57-239; F. Colao, *La libertà d'insegnamento e l'autonomia nell'Università liberale. Norme e progetti per l'istruzione superiore in Italia (1848-1923)*, Milano, Giuffrè 1995, pp. 48-94; I. Porciani, M. Moretti, *La creazione del sistema universitario nella nuova Italia*, in G.P. Brizzi, P. Del Negro, A. Romano (edd.), *Storia delle Università in Italia*, Messina, Sicania, 2007, Vol. I, pp. 323-379.

³¹ Galfré, *Giuseppe Bottai. Un intellettuale fascista*, cit., p. 3.

³² Cfr. De Grand, *Bottai e la cultura fascista*, cit., p. 287.

culturale e della rigenerazione politica era scaduto e Bottai stesso sembrava aver smarrito quella *vis* e quella credibilità che lo avevano contraddistinto in passato.

Eppure, nel 1941, colui che per primo aveva provato a mettere a nudo i limiti culturali ed intellettuali del regime pur condividendone le scelte politiche e caldeggiando anche quelle più sciagurate (si pensi alle leggi razziali, ad esempio), sulla rivista «Primato»³³, per l'ennesima volta, riutilizzando termini e concetti già esposti nel discorso maceratese del 1928, tentava coraggiosamente di rilanciare la sfida di sempre, auspicando nuovamente una più organica collaborazione tra il regime fascista e la cultura, nella speranza che da tale collaborazione scaturisse un rapporto vivo e fecondo e non soltanto propagandistico:

Il vero problema – egli affermava –, il vero distacco che si avverte dagli anziani [...] e dai giovani [...] è quello tra la cultura e la vita sociale e politica. Da qui [...] la nomina di capi che hanno troppo scarso amore per le idee e che puntano solo su un cieco e meccanico “volle”: è il misconoscimento della efficacia e necessità della cultura in quanto cultura e non propaganda. [...] Questo è il nodo essenziale da sciogliere, pratico ed ideale ad un tempo, perché si abbia fra Stato e cultura una collaborazione politicamente libera e socialmente disciplinata; perché si possa stabilire un rapporto organico e funzionale, attivo e continuo fra lo Stato e la cultura³⁴.

³³ La rivista «Primato. Lettere ed arti d'Italia» fu fondata da Bottai (e da lui diretta insieme a Giorgio Vecchietti) il 1° marzo 1940 e proseguì la sua attività fino al 1943. Com'è noto, essa annoverò tra i suoi redattori e collaboratori non solamente taluni tra gli intellettuali più critici e inquieti del fascismo ma anche una serie di personalità (storici, letterati, artisti ecc.) notoriamente estranei al regime, quando non addirittura schierati su posizioni antifasciste. Tra coloro che animarono la rivista con i propri contributi, si segnalano: Vitaliano Brancati, Renato Guttuso, Eugenio Montale, Cesare Pavese, Giaime Pintor, Vasco Pratolini, Salvatore Quasimodo e Ugo Spirito. Per un'analisi dei principali temi affrontati sulla rivista si veda in particolare Guerri, *Giuseppe Bottai, un fascista critico*, cit., pp. 179-195.

³⁴ G. Bottai, *Le università e la cultura*, «Primato. Lettere ed arti d'Italia», n. 2, 1° giugno 1941.

Appendice

*Fascismo e Cultura. Discorso inaugurale detto da S.E. l'On. Giuseppe Bottai, sottosegretario di Stato al Ministero delle Corporazioni, l'11 novembre 1928*¹

Magnifico Rettore, Signore, Signori, Giovani Studenti,

sono in sommo grado onorato di poter pronunciare in questa antica aula del glorioso Ateneo Maceratese il discorso inaugurale del nuovo anno di studi. Forse per la prima volta un rappresentante del Governo sale su questa cattedra, senza essere insignito di grado o funzione accademica ma unicamente per recare la prova viva e palpante dei rapporti sempre più intimi che lo Stato Fascista intende instaurare tra gli uomini del fascismo e i grandi centri della cultura superiore costituiti dalle Università italiane. Ed appunto vorrò nel mio breve limitarmi a considerare il profondo significato dei rapporti sempre più vivi, più assidui e, mi auguro, più fecondi, che si vanno creando fra gli uomini del Fascismo e le Università italiane.

Occorre che tali rapporti non rimangano mera forma; occorre che divengano sostanza d'una nuova, più pura compenetrazione tra il mondo della politica e il mondo della cultura, che, ha, o deve tornare ad avere, nella Università il suo centro di formazione, di propulsione e di irradiazione.

Non ci dissimuliamo che i più frequenti contatti tra uomini, che nel Fascismo hanno posti di responsabilità attiva, e uomini che dedicano alla scienza la loro vita, suscitano in taluni gridi di scandalo, di contrizioni, di pudore.

Vi è, anzi tutto, il falso pudore di coloro che deplorano la contaminazione degli studi da parte di uomini dominanti dalla vita pubblica. Essi sognano, evidentemente, che l'Università abbia ad essere una specie di campo trincerato, di compartimento stagno o di ermetico laboratorio, dove, in alambicchi misteriosi, si distillino formule vane e sterili. Costoro, o sono dei puri spiriti senza iniziativa, alcun poco mistici e contemplativi, o dei volponi in veste d'eremiti, che in siffatti modi si lusingano di conservare, per tempi migliori, le fondamenta ormai vecchie, nelle quali si sono scavata la nicchia. Io vorrei domandare quando mai l'Università fu, negli anni, staccata, avulsa, assente dal suo tempo?

Tutte le Università italiane, nel loro sorgere, nel loro fiorire, nel loro svilupparsi e, infine, nel loro decadere, aderirono alle condizioni politiche, reali e intellettuali dei

¹ *Fascismo e Cultura. Discorso inaugurale detto da S.E. l'On. Giuseppe Bottai Sottosegretario di Stato al Ministero delle Corporazioni l'11 novembre 1928*, «Annuario della Regia Università degli Studi di Macerata», 1929, pp. 17-21.

tempi in cui ebbero a vivere. Verità vera e provata: o che, forse, nelle Università italiane, negli ultimi del secolo scorso e nei primi di questo, fino a ieri, fino a oggi, purtroppo, non prevalse un indirizzo di cultura democratica, liberalesca, illuministica e anche un poco sovversiva e negatrice? E per quali ragioni mai, io sempre domando, se l'Università nostra per opera di uomini della vecchia classe dirigente si conformò agli orientamenti filosofici e spirituali del vecchio Stato, non dovrebbe, oggi che il Regime Fascista ha capovolte le ragioni ideali dello Stato, mutare, come da occidente a oriente, la sua rotta e diventare, vivaddio, fascista fino al midollo?

C'è, poi, accanto a tal sorta di pudore di marca accademica, il pudore degli uomini cosiddetti d'azione, tutti muscoli, tutti nervi, tutti fegato, che temono che il Fascismo, bazzicando le aule universitarie, perda il suo vigor pratico e la sua energia creatrice di fatti.

Occorre risolvere l'assurda antitesi, con cui, da campi opposti, come s'è visto, da quello concluso della cultura intellettualistica e dall'altro senza confini dell'ignoranza presuntuosa, si tenta di generare un pratico contrasto tra Fascismo-azione e Fascismo-cultura.

Basta, a tal uopo, ripensare al breve ma denso corso della nostra Rivoluzione, per ritrovarvi, nelle successive sue fasi un integramento [non] nominale, ma storico dell'un Fascismo nell'altro.

Il Fascismo fu, nei suoi inizi, reazione contro uno stato di cose a tutti insopportabile. Una reazione non uniforme, anzi diversa, da una parte all'altra d'Italia, dal nord industriale al sud rurale, da provincia a provincia e, nella stessa provincia, tra paese e paese, e, nel paese medesimo, tra individuo a individuo. In quell'aspra lotta di difesa comune era il nemico, ma contro di esso ciascuno combatteva per quel che era alla sua coscienza più chiaro, interesse o ragione ideale. Solo quando il Fascismo marcia su Roma le singole volontà si stringono sull'unica volontà, che cancella ogni particolarismo di individui, di categorie, di ceti, di regioni, per la fondazione del nuovo Stato.

La comunione delle volontà non è ancora la comunione del pensiero, della dottrina, del sistema, del metodo. Il che è un bene nei periodi dell'azione diretta. Le rivoluzioni, allorquando combattono per il loro trionfo, guadagnano d'una tal quale indeterminatezza e imprecisione di idee, così che nel loro ondeggiante programma, ciascuno possa cogliervi o intendervi quel che più si attaglia al suo gusto o al suo interesse.

Ma, quando l'azione deve tradursi concretamente nelle leggi, negli istituti o addirittura, come noi stiamo facendo, nella costituzione d'un popolo, l'unità del pensiero è necessaria e, ove essa manchi, si ha l'incongruenza legislativa e giuridica, per cui una rivoluzione può affermarsi in un ordine di istituti e in altro contraddirsi e negarsi.

È vero, e mi piace qui riaffermarlo, che per noi fascisti le teorie, in politica come in ogni altro campo, non sono che strumenti di lavoro, fili conduttori, grandi linee direttrici di marcia. Del resto tutte le applicazioni, non solo quelle d'ordine più propriamente politico o economico o sociale, hanno un carattere sperimentale. Nella stessa storia della scienza, nel regno, cioè, del formale e dei dati precisi e sicuri, si ha una vicenda continua di esperimenti che si legano l'uno all'altro, in una serie infinita e interdipendente di ritrovamenti teorici e di pratiche attuazioni. Ma perché la scienza e ogni altra specie di attività dell'intelletto, non ultima tra le quali la politica, non

degenerino in gretto empirismo, è necessario sulla frammentarietà ed episodicità degli esperimenti sovrastare, incombere, con l'unità d'un pensiero organico e sistematico, che riduca tutto ad una traccia e ad un orientamento.

È giunta l'ora di dir chiaro a chi si ostina a riguardare i fatti e le cose e gli uomini e i problemi con la sola osservazione dell'interesse immediato e giornaliero, che in siffatto modo non si vedono che fatti, cose, uomini e problemi in serie, cronaca e non istoria, ideali di settori e non di popolo. Solo un pensiero unitario, solo un'ordinata cultura possono stabilire i rapporti e le connessioni necessarie a dare alla politica d'una classe dirigente un respiro di politica nazionale.

Una grande politica non è, in fondo, che un metodo di pensare, di studiare, di predisporre e di ordinare i rapporti tra i valori, ponderabili e imponderabili, che si agitano nella vita di un popolo, un'energia che, ricollegando i particolari all'universale, determina le qualità fondamentali d'un processo storico e crea, con moto unitario e unificatore, uno stile politico e il carattere di un'epoca.

In questi termini si pone, secondo me, il problema della cultura nella fase attuale del Fascismo. Il Fascismo-cultura, in cui, come s'è visto, si integra, non si nega, il Fascismo-azione, è il fondamento del Fascismo-Stato. Già troppo certi demagogici e facili incitamenti all'incultura hanno devastate anime e coscienze, perché noi si debba seguitare a prestar fede a quegli empirici, che si vantano di procedere a lume di naso.

Io non credo alla pratica dei praticoni. Chi non sa organizzare le proprie idee non può pretendere di organizzare quelle degli altri. Nel nostro tipo di Stato, che non è un'arida costruzione burocratica (sia che si tratti della vecchia burocrazia, sia che si tratti di quelle ora nascenti nell'orbita sindacale), non basta una sorta di contabile praticità. Il nostro Stato impegna i cittadini nel loro spirito e nella loro coscienza; è sugli spiriti e sulle coscienze che occorre operare per servizio. Le stesse leggi sindacali, nella «Carta del Lavoro», l'impostazione dei problemi di interessi materiali e di garanzie contrattuali si legano a ragioni di ordine superiore, come l'educazione e l'istruzione dei singoli e il supremo interesse della produzione, che un organizzatore deve essere in grado di interpretare. Perché ciò avvenga gli è d'uopo non solo conoscere quelle leggi nella loro applicazione immediata, ma saperne calcolare, con almeno approssimativa preveggenza, i possibili sviluppi. L'organizzatore, insomma, deve possedere quella superiore forma di praticità, che consiste nel saper guardare innanzi a sé per non sbagliare e perdere la strada.

In questo punto preciso si innesta, secondo me, la funzione universitaria nel Fascismo: nella preparazione d'una cultura viva, creatrice d'una classe di uomini atta a dirigere, nella politica, nella scienza, nell'arte. L'Università deve adeguarsi a un compito di questa specie. Tutti i grandi aspetti d'una civiltà, dalla religione alla filosofia, dalla scienza alla letteratura, dagli istituti politici alle organizzazioni economiche sono riducibili a un principio, unico, che tutti li informi.

Il principio animatore del Fascismo deve essere elevato a comun denominatore di ogni ordine di studi. Di ogni ordine: ché, se la necessità di una rivoluzione culturale è soprattutto sensibile negli studi giuridici, politici, economici e sociali, non meno urgente è anche in altri ordini di studi dove prevalgono tuttavia indirizzi in contrasto con la formazione fascista del carattere e della mente degli individui. Noi non chiediamo all'Università di piegarsi alle finalità particolari e agli interessi contingenti degli uomini, con apologie ed esaltazioni di falsi valori. Non chiediamo bassi servizi, ma che il divino

ufficio della cultura sia composto con gli occhi fissi alle nuove ideali verità, sorte dal sacrificio d'una generazione. Sempre, negli anni della rivoluzione unitaria, dettero le Università italiane alla lotta idee e combattenti. Idee e combattenti si preparino a dare esse per le lotte di domani, per quelle che l'Italia affronterà, non più per la sua libertà, ma per la sua potenza: potenza di una cultura e di una civiltà nuove, per tutto il mondo esemplari.

Il «Fiammifero» di Vamba. Un disegno ritrovato: primi appunti di ricerca

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The «Fiammifero» (the “matchstick”) of Vamba. A recovered drawing: first research notes

ABSTRACT: The research note aims to bring to attention scholars of history of children's literature, and particularly of history of periodical publishing for children, on the fortuitous discovery in a historical archives of a drawing draft – linked with the noted name of *Vamba* – that had been probably designed for the front cover of a ‘new’ magazine for children of which neither the existence nor the project were known so far.

EET/TEE KEYWORDS: Children's and Youth Literature; Drawing; Periodical; Italy; XIX Century.

A Frida e Luigi ‘Picci’ Calvitti, il cui spirito
guida ancora il Girotondo dei Grilli di Vamba

Le presenti note intendono portare all'attenzione degli studiosi di storia della letteratura per l'infanzia, e in particolare di storia della stampa periodica per ragazzi, un interessante ritrovamento recentemente effettuato presso l'Archivio della Confraternita della Misericordia di Firenze.

Si tratta di un disegno – attualmente conservato presso la *Sezione Disegni*, contrassegnato con il n. 6 – di cui non è stato possibile accertare la provenienza, fatto del resto comprensibile data la quantità di donazioni e lasciti che annualmente affluiscono nell'istituzione fiorentina¹.

¹ L'archivio è in fase di riordino a cura delle dottoresse Barbara Affolter e Laura Rossi della Soprintendenza archivistica della Toscana che ringraziamo per l'assistenza. Un grazie particolare all'architetto Giovanni Barnini che si è prestato alla non facile ricerca del documento.



Fig. 1. *Il Fiammifero*. Giornale umoristico diretto da Vamba, [disegno], cm 34,5x30, Sezione Disegni, n. 6, Archivio della Confraternita della Misericordia di Firenze (foto a cura dell'A.; per gentile concessione dell'ente).

Il foglio misura cm 34,5x30; sopra, con tratti in penna rapidi e sicuri, è raffigurato un ragazzo dell'apparente età di 10/15 anni. Lo sguardo obliquo in atto di riflessione denota a un tempo furezza e fragilità. A tracolla porta un contenitore sul quale offre la sua merce ai passanti: sullo sfondo si riconosce chiaramente un tratto di lungarno fiorentino col suo tipico lampione. Piove, alcuni passanti avanzano controvento sullo sfondo.

Il disegno è la bozza per la testata di un giornale che forse non ha mai visto la luce e di cui solo ora veniamo a conoscenza grazie a un felice ritrovamento d'archivio.

Sul lato destro del foglio si legge: «*Il Fiammifero*. Giornale umoristico illustrato diretto da Vamba».

Il nome dell'autore non ha bisogno di presentazione, doveroso invece riconoscere che non si era a conoscenza di questo suo giornale, meglio di questo suo progetto testimoniato dal disegno firmato che, a quanto risulta,

è attualmente l'unico di cui si conosca l'esistenza dopo la dispersione di gran parte delle sue carte².

Significativo e conseguente il soggetto scelto per il disegno della testata che anticipa quello che diverrà inseguito il principale centro di interesse di Vamba maturo quando, abbandonato il giornalismo 'adulto', si darà tutto al mondo dell'infanzia e della gioventù.

Il piccolo venditore ambulante che offre ai passanti la propria merce (nel caso fiammiferi) diviene un'icona parlante di quella figura quotidiana e 'normalizzata' presente nelle strade cittadine del tempo, popolate da una moltitudine di ragazzi e bambini con la loro mercanzia spicciola come semi, lupini, articoli di merceria, giornali e quanto altro fosse di rapido e utile smercio. Attività gestite da adulti ma sempre praticate in modo ambulante da manodopera minorile. L'attenzione di Vamba per questo mondo di piccoli lavoratori diverrà poi sistema all'epoca de «Il giornalino della domenica» quando inviterà abbonati e semplici lettori a documentare con temi, interviste, concorsi fotografici il variegato mondo dell'infanzia lavoratrice dai carusi delle zolfare agli spazzacamini del nord Italia.

Vamba era entrato nel mondo del giornalismo nel 1884 chiamato a Roma da Luigi Arnaldo Vasallo come collaboratore/illustratore de «Il Capitan Fracassa» un giornale satirico di opposizione allora molto diffuso³. Fu nella sede di questo



Fig. 2. Ingrandimento del particolare del fiammiferario.

² Ci sembra utile soffermarci sulla particolare qualità del disegno che si distacca nettamente dallo stile del Vamba più consueto e conosciuto, il pupazzetto. Qui il carattere compendiarico di tale tecnica è del tutto assente pur nella rapidità del segno. Con pochi tratti l'autore è riuscito a delineare non solo il tipo ma anche l'individuo collocato nel proprio ambiente, dotato di una personalità e di un 'umore' che risaltano dalla postura e dall'espressione del volto. Tanto più viva quanto più s'ingrandisce il disegno. L'opposto del pupazzetto nato per compendiare un testo, non per essere testo lui stesso. Ci troviamo perciò di fronte a un vero e proprio ritratto di un «monello» fiorentino uscito per la sua consueta giornata di lavoro sul Lungarno in una giornata di pioggia e vento, infagottato più che vestito, messosi con pazienza in posa. Un ragazzo vero e non un pupazzetto.

³ Il «Capitan Fracassa» fu fondato a Roma da Luigi Arnaldo Vasallo (Gandolin) nel 1880. Vi scrissero D'Annunzio, De Amicis, Carducci, Serao e tanti altri tra artisti, poeti e uomini politici. Per maggiori notizie sull'impegno giornalistico di Vamba in questo periodo si veda: A. Ascenzi, M. De Felice, R. Tumino (edd.), *Santa Giovinezza Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, Macerata, Alfabetica Edizioni, 2008.

giornale, in via del Corso, che il giovane giornalista ex impiegato delle Ferrovie ebbe modo di frequentare quel variopinto mondo di artisti, poeti, attori e politici che ad ogni ora del giorno e della notte entravano e uscivano dai modesti locali della redazione che fu per anni un ritrovo alla moda di Roma. In quest'ambiente il nostro ebbe modo di affinare la capacità nel caricaturare e pupazzettare, nel cogliere con pochi tratti il senso del volto di un personaggio, fosse un politico, un artista o un letterato. La sua collaborazione al «Fracassa» durò sino al novembre 1887 quando lo abbandonò per dissensi politici con la proprietà. Lo seguirono il Vasallo (*Gandolin*), Luigi Lodi (il *Saraceno*), Luigi Faelli (*Cimone*). Insieme fondarono subito dopo un quotidiano che volle riprendere lo spirito e lo stile del «Fracassa», il «Don Chisciotte della Mancìa». È in questo frangente che Vamba, rientrato a Firenze dove conservava la residenza, tentò la carta di un giornale interamente suo, fondato, diretto e pupazzettato da lui: «Il Fiammifero».

Il Fiammifero diretto da Vamba. Firenze

Firenze 3 dicembre 1887

Carissimi amici

scrivo anche io [...] la prima lettera dal mio nuovo ufficio che, come potete figurarvi, non è più ampio di una scatola di fiammiferi. Venuto via da Roma in un momento in cui vedevo difficile il potervi rimanere [...] non trovai di meglio a fare che piantare il mio fiammifero a Firenze. E il mio fiammifero di fatti, metterà fuori la capocchia il prossimo venerdì e continuerà, speriamo, a metterla fuori settimanalmente per un pezzo. Ne ho già fatti tre numeri: io assisterò all'uscita del primo e poi verrò a Roma lasciando ad altri la cura di mandar fuori gli altri due e di continuare⁴.

Così Vamba informava gli amici rimasti a Roma della sua nuova iniziativa giornalistica, la prima giova ripeterlo, interamente ideata e condotta da lui. Gli amici non ne vengono però esclusi, in particolare il Vasallo che primo lo aveva introdotto al giornalismo. Continuando, infatti, nella lettura della lettera troviamo un passaggio che ci illumina sulla natura di quel foglio vagante all'origine della presente ricerca:

Personale.

Caro Arnaldo

T'ho inviato un disegno: è la testata del fiammifero, del mio fiammifero che si accende alla più leggera fregata e che spero non ti romperà le scatole se invoca da te un urgente favore:

⁴ F. Cordova, *Caro Olgogigi. Lettere a Olga e Luigi Lodi. Dalla Roma bizantina all'Italia Fascista (1881-1933)*, Milano, Franco Angeli, 2009, pp. 167-168.

si tratta di dare il disegno a qualcuno perché lo riproduca in piccolo [...] in modo ch'io lo abbia per giovedì [...] Per le dimensioni [...] l'incisore può prendere regola dal formato del giornale che sarà quello del *Messaggero* per larghezza della pagina. Dallo a chi vuoi e fallo eseguire col sistema che tu credi meglio. Scrivimi⁵.

Cosa può essere il disegno ritrovato se non quello spedito all'amico, poi giunto per vie traverse e ignote sino all'archivio della Misericordia di Firenze? O forse non spedito e rimasto in loco.

Certo è che non è stato possibile reperire copia né traccia alcuna in Repertori e in Biblioteche di questo «Fiammifero» di Vamba⁶. Questo di per sé non sarebbe sufficiente e comprovarne la non esistenza, non sarebbe la prima volta che ciò accade⁷. Più probabile l'ipotesi che Vamba assorbito dalla nuova impresa del «Don Chisciotte» fondato con gli amici a Roma negli stessi giorni, non abbia più attuato il progetto, ritornandoci sopra non molto tempo dopo mutandone il titolo.

Sempre a Firenze infatti il nostro fonderà nel novembre 1890 il quotidiano «L'O di Giotto giornale chiaro e tondo» che per i primi quattro mesi uscirà a Firenze trasferendosi poi a Roma fino alla chiusura nel dicembre 1892. La certezza però che il disegno sia proprio quello inviato all'amico Arnaldo è rafforzata da una scritta autografa di Vamba riquadrata in basso a destra del foglio, scritta che riprende i consigli tipografici già espressi nella lettera:

Questo pezzo deve essere incavato.

Nel titolo la carta ha un po' sparso l'inchiostro.

Si prega di riparare questo inconveniente nell'incisione.

Il tutto deve essere ridotto alla proporzione di 22 cm di larghezza.

Testo chiaramente tecnico che completa e amplia, chiarendo difetti rimedi e misure, quanto scritto nella lettera alla quale era verosimilmente accluso. Per quali vie il disegno spedito a Roma sia poi approdato all'archivio fiorentino al momento non è dato sapere.

⁵ *Ibid.*

⁶ Si ha notizia di altri due periodici fiorentini con lo stesso titolo: il primo uscito dal 23 febbraio 1865 al 22 maggio dello stesso anno, bisettimanale con caricature, in tutto ventidue numeri; il secondo, quotidiano non illustrato di fede monarchica uscito dal 15 al 23 febbraio 1891, in tutto nove numeri.

⁷ Si veda ad esempio il caso del quindicinale illustrato «La strada» edito a Firenze tra il novembre 1943 e il gennaio 1944 a cura di un gruppo di architetti, artisti e intellettuali fiorentini quali Nella Baroni, Italo Gamberini, *Yambo*, Lia Sellerio, Amerigo Gomez, Piero Annigoni e altri. Riccamente illustrato in bianco nero e colori, formato *folio*, si proponeva come luogo d'incontro e scambio in un momento storico delicatissimo, riuscendo a mantenere un prudente equilibrio critico. Ne uscirono sette numeri. Di esso non esiste traccia nei Repertori specialistici né copia in pubbliche biblioteche.

*Critical Reviews
and Bibliography*



Rassegne critiche,
Discussioni e Bibliografia

Critical Reviews / Rassegne critiche

Ce que lisent les enfants français d'aujourd'hui

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What French children read today

ABSTRACT: The importance of promoting good reading culture and related reading attitudes with the aim of improving the personal and intellectual development of young people, is analysed in the light of an attentive review of the current 'best-read' books in France, which contributes to elaborate a sort of contemporary 'canon' of literature for children and youth.

EET/TEE KEYWORDS: Children's and Youth Literature; Literary History; Reading Taste; Cognitive Development; France; XX Century.

Les parents veulent que le livre pour la jeunesse soit paré de toutes les vertus et ils se désolent de voir que leurs enfants lisent de moins en moins. Dans les années 1950, toutes les filles raffolaient des *Quatre filles du docteur March*; elles ne sont plus qu'une sur deux aujourd'hui. A l'heure des versions abrégées et des recueils de morceaux choisis, on peut s'interroger sur le rôle de la lecture dans la réussite scolaire. La thèse qui prétendait le contraire est aujourd'hui mis en cause¹. L'O.C.D.E. prône au contraire un cercle vertueux qui transforme les bonnes lectures en bonnes notes. En dépit d'une offre de qualité, les jeunes Français ne sont pas de gros lecteurs. Ils sont 35,5% à lire à 11 ans et 9% seulement pendant leur adolescence. En outre, ceux qui ne lisent presque jamais sont 14,5% à l'âge de 11 ans, et 46,5% à 17 ans. Les filles sont deux fois plus nombreuses que les garçons à lire pendant leur adolescence². En 2010, le tiers des enfants français diversifiaient leurs lectures et 16% seulement aimaient les

¹ F. de Singly, *Les jeunes et la lecture*, Paris, Ministère de l'Éducation Nationale, 1993.

² Ch. Detrez, S. Octobre, in C. Evans, *Lectures et lecteurs à l'heure de l'Internet*, Paris, Ed. du Cercle de la Librairie, 2011.

textes longs. Les jeunes qui lisent beaucoup ont pourtant une bien meilleure compréhension de l'écrit et ils doivent s'investir pour cela dans des lectures variées en y prenant plaisir. La vraie question est celle du goût de la lecture. Depuis quelques dizaines d'années, les enfants lisent des ouvrages qui ne s'inscrivent plus dans une lignée cataloguée trop sage. Ils dévorent des livres qui les concernent et dont ils sont les héros³. Les adolescents ont élu de nouveaux classiques plus adaptés à leur goût. Ils vivent dans un monde moins favorable à l'aventure que par le passé alors que le fantastique et les romances paranormales ont toujours du succès auprès des filles et des garçons. Ils plébiscitent les héros qui jouent les justiciers. Les adolescents apprécient un genre cher à Orwell et à Bradbury qui peint un futur proche à travers des sociétés imaginaires menacées par la guerre et le totalitarisme⁴. Un monde scindé en deux oppose les habitants des villes basses aux privilégiés qui vivent fastueusement à leurs dépens⁵. Les textes qui déforment l'univers plongent leurs lecteurs dans un monde souterrain qui peut abriter des cités dissidentes édifiant leurs propres règles en fonction du développement des technologies⁶; mais on y rencontre le plus souvent des citoyens vivant l'harmonie factice des sociétés totalitaires⁷. Les enfants de cet autre monde doivent adopter la profession de leurs parents et épouser celui ou celle qu'on leur destine. On leur attribue dès la naissance une étiquette qui évolue ensuite en fonction de leur comportement dans cet univers rendu plus inquiétant par des pratiques cliniques et hygiénistes⁸. Les héros s'affranchissent de ce « meilleur des mondes » grâce à leur personnalité propre⁹. L'un d'entre eux se distingue par son impertinence et ne cesse d'inventer les sottises les plus folles pour contester l'ordre établi¹⁰. Les adolescents découvrent avec angoisse un monde où les adultes ne les souhaitent plus depuis que la science est parvenue à arrêter leur vieillissement¹¹. Leurs craintes portent sur l'intégrité physique, les manipulations génétiques, la surconsommation et les addictions¹². Ils veulent qu'on leur parle du divorce, de l'adoption, de l'anorexie ou des premières amours chaotiques. Les sujets qui les préoccupent traitent de l'amour imposé ou éradiqué, de la recherche de la jeunesse éternelle, des diktats de la beauté, de la

³ S. Jackson, I. Livingstone, *Le pirate de l'au-delà. Un livre dont vous êtes le héros*, Paris, Gallimard Jeunesse, 2012.

⁴ S.B. Pfeffer, *Chroniques de la fin du monde. Au commencement*, Paris, Pocket Jeunesse, 2011.

⁵ Y. Grevet, *Nox*, Paris, Syros, 2012.

⁶ E. Sénabre, *Sublutetia*, Vol. I: *La révolte de Hutan*, Paris, Didier Jeunesse, 2011; Id., *Sublutetia*, Vol. II: *Le secret de maître Houdin*, Paris, Didier Jeunesse, 2012.

⁷ S. Collins, *Hunger games*, T. III: *La Révolte*, Paris, Pocket Jeunesse, 2011.

⁸ J.-Cl. Mourlevat, *Terrienne*, Paris, Gallimard Jeunesse, 2011.

⁹ G. Malley, *Sentiment 26*, traduit de l'anglais par Marianne Roumy, Paris, Ed. Michel Lafon, 2012.

¹⁰ Ch. Mauri, *Le premier défi de Mathieu Hildal*, Paris, Gallimard Jeunesse, 2011.

¹¹ G. Malley, N. Peronny, *La Déclaration*, Vol. I, Paris, Naïve, 2007; Idd., *La Résistance. L'histoire de Peter*, Vol. II, Paris, Naïve, 2012; Idd., *La Révélation*, Vol. III, Paris, Naïve, 2011.

¹² A. Allen-Gray, *Unique*, Paris, Bayard Jeunesse, 2011.

menace du numérique ou de la dictature du bonheur¹³. Ces thèmes radicalisent bien souvent les dangers de notre société; mais ils servent de toile de fond à des aventures pimentées par la touche d'optimisme de leurs héros. La littérature pour la jeunesse affectionne les sujets courts, plus explicites, faits pour être lus facilement. L'idée d'une menace latente est entrée dans l'inconscient collectif des jeunes lecteurs; mais en créant une distance avec le réel, le récit féérique dévoile des combats qui concernent l'âme individuelle aussi bien que les guerres cosmiques.

Le crime et l'ambiance para normale sont des ingrédients très prisés d'une littérature qui n'hésite pas à nouer des intrigues entre le monde des morts et celui des vivants. Les enfants frissonnent au mélange d'horreur et de fantastique qui émaille les aventures des héros dont ils partagent les préoccupations. Ils suivent avec passion les aventures d'un jeune drapier parti à la recherche d'une toile fluide et magique qui se confond avec la couleur du temps. Il veut découvrir un territoire mythique qu'une jeune sauvageonne s'efforce d'atteindre en écumant les océans¹⁴. Ces récits connaissent des dénouements heureux et donnent au lecteur le pressentiment d'une transfiguration de toute chose qui constitue l'objet suprême de leur espérance¹⁵. Les livres pour la jeunesse jouent ainsi un rôle essentiel dans le développement de l'imagination des enfants¹⁶. Il est vrai que les récits amplifiés de merveilleux sont parfois taxés de «contes à dormir debout»; mais leurs remèdes de bonnes femmes véhiculent des recettes thérapeutiques à l'efficacité fondée sur d'anciennes expériences. Les auteurs de la littérature pour la jeunesse conservent un souvenir très vif de leur propre enfance, tout en se glissant dans l'époque où vivent leurs lecteurs. L'histoire d'adolescentes qui s'échangent un «jean» en guise de talisman plonge dans l'intimité d'un groupe de jeunes filles de notre temps¹⁷. Les auteurs privilégient le contact direct avec les lecteurs par le biais d'Internet et ils créent ainsi des communautés d'adeptes. Le temps où l'adolescent se réfugiait dans sa chambre pour dévorer son livre préféré est désormais révolu. L'intérêt du texte et de ses illustrations ne suffit plus et il faut les accompagner d'une couverture attrayante. La littérature pour l'enfance a pris conscience de la présence d'adultes parmi ses lecteurs. Le phénomène n'est pas nouveau, des ouvrages comme *Robinson Crusoë*, *Les Voyages de Gulliver* ou *Ivanhoë* ont été écrits pour les adultes avant d'être adaptés aux enfants, mais il s'est intensifié ces dernières années. D'ailleurs,

¹³ A. Coudy, *Promise*, Paris, Gallimard Jeunesse, L. Oliver, *Delirium*, Paris, Hachette Jeunesse; Catherine Gendrin, *Jazyaa, la tapageuse*, Paris, Didier, 2010. S. Westerfeld, *Uglies*, T. 2: *Pretties*; T. 3: *Specials*; T. 4: *Extras*, Paris, Pocket Jeunesse, 2007, 2008; M. Lancaster, *O. 4.*, Paris, Nathan, 2011; J. Molla, *Felicidad*, Paris, Gallimard Jeunesse, 2010.

¹⁴ F. Place, *Le secret d'Orbae*, Vol. I: *Le voyage de Cornelius*; Vol. II: *Le voyage de Ziyara*, Paris, Castermann, 2011.

¹⁵ I. Fernandez, *Défense et illustration de la féerie*, Paris, Philippe Rey Ed., 2012.

¹⁶ Q. Blake, *Préface*, in Julia Eccleshare, *Les 1001 livres d'enfants qu'il faut avoir lus pour grandir*, Paris, Flammarion, 2010; T. de Fombelle, *Victoria rêve*, Paris, Gallimard Jeunesse, 2012.

¹⁷ A. Brashares, *Quatre filles et un jean*, *Le Deuxième été*, Paris, Gallimard Jeunesse, 2010.

le succès de la littérature pour la jeunesse a incité des auteurs de livres pour adultes à s'intéresser à elle. John Grisham écrit *Théodore Boone* et Didier Van Cauwelaert *Thomas Drimm*¹⁸.

Les textes de la littérature pour l'enfance sont considérés comme des classiques lorsqu'ils s'inscrivent dans la durée en générant de nombreuses adaptations dans les médias et en exerçant une influence sur les développements littéraires à venir. La fable existe depuis des siècles et elle appartient à la tradition populaire. Ses versions modernes répondent à des préoccupations actuelles. La fable est en effet bien souvent la première forme littéraire avec laquelle l'enfant entre en contact. Elle se caractérise par la présence du merveilleux au niveau thématique et elle fait de l'enfant son objet idéal. Elle parle de choses essentielles qui font partie de son pouvoir de séduction et elle est constamment rééditée. Une sélection des *Fables* d'Ésope devient plus accessible grâce à l'emploi de phrases simples et limpides. Les animaux jouent le rôle principal dans ces récits familiers de caractère moral et allégorique qui rappellent combien la «langue d'Ésope» peut être la meilleurs comme la pire des choses¹⁹. Né soixante ans après La Fontaine, Florian reste un maître du genre. Il affirme que sans un peu de travail on n'a pas de plaisir et certaines de ses expressions sont devenues proverbiales²⁰.

Les contes des frères Grimm sont présentés dans une nouvelle traduction, très éloignée des adaptations cinématographiques de Walt Disney²¹. Leur poésie enchante le lecteur et justifie leur réputation de 'livre d'éducation'. La reprise des contes nécessite pourtant des adaptations qui permettent aux jeunes d'accompagner leur héros et de participer à l'action. Les versions contemporaines de *Hans et Gretel* censurent les aspects les plus insupportables du récit et notamment l'abandon des enfants par leurs parents. Il faut beaucoup d'habileté pour transposer à notre époque un monument comme *Les petites filles modèles* de la comtesse de Ségur. Les caractères des personnages et leurs stéréotypes doivent s'inscrire dans un univers contemporain pour devenir crédibles²². Les contes sont d'inépuisables sources d'inspiration. La fillette du *Petit Chaperon rouge* troque son panier légendaire pour un ballon afin de donner plus de légèreté au récit²³. Une fantaisie irrévérencieuse permet de rénover un *Petit Poucet* pour s'en prendre aux méchantes sorcières et aux affreux parents. Deux héros fûtés et courageux cherchent à savoir pourquoi leurs parents ont aménagé dans une maison contigüe à celle d'une ogresse. Elle dévore les enfants que lui livrent des

¹⁸ H. Coben, *Ne le dis à personne*, Paris, Pocket Jeunesse, 2003; *Sous Haute tension*, Paris, Belfond, 2012.

¹⁹ Ésope, *Fables*, Paris, Actes Sud Junior, 2012.

²⁰ *Fables choisies de Florian*, Paris, Les Éditions de l'Amateur, 2011.

²¹ *Les contes des frères Grimm*, traduit de l'allemand par N. Rimasson-Fertin, Paris, Taschen, 2011.

²² R. Elland-Goldsmith, *Les nouvelles Petites filles modèles*, Paris, Hachette Jeunesse, 2010.

²³ M. Ramos, *Mon ballon*, Paris, Pastel, 2012.

parents excédés par leurs caprices²⁴. Un conte d'Alexandre Dumas retrouve une seconde jeunesse. Le héros succombe à l'appel d'une oie magicienne et doit casser des œufs pour voir ses vœux exaucés; mais sa maladresse l'entraîne dans de folles aventures où il se trouve métamorphosé tour à tour en oiseau, cochon ou papillon²⁵. Le conte de Noël *Michka* est plus récent (1941). Cette histoire d'ourson en peluche qui fuit la chambre d'une enfant trop gâtée pour partir à l'aventure méritait d'être revisitée²⁶. Les nouvelles de Dino Buzzati sont par contre révélatrices de l'intérêt de la jeunesse pour les récits d'épouvante. Dans cette 'kermesse de la mort', les scalpels défoncent les crânes, les crochets brisent les jambes, des larves, des araignées, des crapauds et des hiboux se déchirent et s'éventrent dans la trompeuse quiétude d'une nuit d'été²⁷. L'auteur du *Désert des Tartares* devient celui de *Psychose* chez les bêtes. Ces textes courts se veulent autant de passerelles jetées vers le meilleur de la littérature. La recherche de la simplicité écarte impitoyablement tout ce qui ne sert pas directement à l'histoire. L'objectif est de transmettre des valeurs afin de répondre aux interrogations de jeunes lecteurs qui cherchent à trouver leur place dans le monde.

De belles histoires donnent à réfléchir en faisant exploser les stéréotypes et en développant le libre-arbitre des enfants. La prolifique romancière britannique Enid Blyton était à l'origine des plus célèbres séries pour la jeunesse des années 1960-1970 parmi lesquelles *Oui-Oui*, *Le Club des cinq* et *Le Clan des Sept* furent les fleurons d'une «Bibliothèque rose». Ces vieilles gloires n'ont pas dit leur dernier mot et elles ont été rééditées avec des textes révisés et de nouvelles illustrations. Les parents ont la nostalgie de ces livres et ils les achètent à leurs enfants. *Les Six compagnons*, *Martine* et un inédit de *Fantômette* ont été remis au goût du jour²⁸. Les Français n'en finissent plus de découvrir l'œuvre de C.S. Lewis, l'auteur des inoubliables *Chroniques de Narnia*. Il réinterprète le mythe de Psyché, d'après *L'Ane d'or* des *Métamorphoses* d'Apulée dans une version qui s'éloigne du symbole de la destinée de l'âme aux prises avec l'amour. La réflexion sur la liberté, la trahison et le repentir s'avère plus actuelle²⁹.

Le bestiaire des contes était fourni dès l'Antiquité et l'animal occupait encore une place d'honneur dans l'univers merveilleux des enluminures médiévales où il se muait parfois en étranges créatures. La fée Melusine prenait la forme d'un dragon ailé pour fuir son époux Raymondin qui n'avait pas respecté l'interdiction de la voir le samedi³⁰. La morale s'avère plus accessible que celle d'Orphée et d'Eurydice. Le mythe du poète condamné pour avoir dévoilé des

²⁴ K. Mac Gowan, *Comment cuisiner et dévorer les enfants*, Paris, Bayard Jeunesse, 2012.

²⁵ A. Dumas, *Pierre et son oie*, Paris, Raminagrobis ed., 2012.

²⁶ M. Colmont, *Michka*, Paris, Flammarion, 2011.

²⁷ D. Buzzati, *Douce nuit et autres nouvelles cruelles*, Paris, Larousse, 2011.

²⁸ E. Blyton, *Le Club des Cinq en péril*, Paris, Hachette, 2006; E. Blyton, *Oui-Oui au pays des Jouets*, Paris, Hachette, 2010; P.-J. Bonzon, *Les Six Compagnons*, Paris, Hachette, 2010; G. Chaulet, *Fantômette*, Paris, Hachette, 2010.

²⁹ C.S. Lewis, *Tant que nous n'aurons pas de visage*, Paris, Anne Carrière ed., 2011.

³⁰ C. Heck, R. Cordonnier, *Le Bestiaire médiéval*, Paris, Citadelle et Mazenod, 2011.

mystères interdits à l'être humain va à l'encontre de l'imaginaire qui préside aux aventures ulysséennes des contes modernes. Les animaux du Moyen Age détiennent des propriétés qui se prêtent à des enseignements moraux. Le lion fut couronné roi des animaux par ceux qui le dotaient d'une dimension christologique. Sa promotion fut assurée par l'Eglise au détriment de l'ours, incarnation de la colère, de la paresse et de la luxure. Au XIX siècle, sous la plume de Nietzsche, les instincts et les passions s'incarnaient dans une meute d'animaux chargés de symboles. Le chameau avait l'amour des fardeaux, le lion la soif des combats, le serpent l'intelligence et la ruse. La tarentule, araignée géante mythique plutôt que mygale zoologique, était par excellence la figure de la vengeance. Fille du ressentiment, elle incarnait le désir de calomnier le monde et de prêcher la mort. Les animaux ont des attributs qui les caractérisent. La crinière fait le lion et la crête fait le coq. Cette liberté donne toute leur fraîcheur à des images stylisées qui sont immédiatement reconnaissables pour les plus jeunes. L'éléphant en est un premier exemple. Il se réfugie en ville pour échapper aux chasseurs, s'habille comme les humains, apprend à marcher sur deux pattes et fréquente l'école. Il peut alors regagner la jungle où il est couronné roi des animaux. Son succès vient de sa forte personnalité et de son règne en bon père de famille sur la fratrie qui l'entoure³¹. La parabole du roitelet gagnant par la ruse le titre de «roi des oiseaux» illustre une morale universelle³². Le succès paraît promis à un rapace ou à un oiseau migrateur, mais le roitelet qui s'endort dans le plumage de l'aigle n'a plus qu'à s'en échapper à proximité du but. L'art des auteurs consiste à faire du neuf avec de l'ancien. Un lion sanguinaire qui règne flanqué d'un singe malfaisant doit faire face à la révolte de son peuple. La fable ravit les plus jeunes par son comique de situation³³. Le peuple fragile des hommes-libellules est régi par des pères fondateurs qui distribuent les rôles à la naissance. Le héros né sans cette marque distinctive est privé de destin, ce qui l'amène à remettre en cause l'ordre établi³⁴. Le lapin est un animal prolifique et sa femelle s'identifie à une mère débordée par sa nombreuse progéniture. On retrouve dans cette famille emblématique un père fréquemment absent, un adolescent narcissique et des jumeaux coquins³⁵. Le chien Furgul fuit sa cage pour échapper à la mort et sort affermi des épreuves qu'il doit affronter au cours d'un saisissant western canin. L'auteur raille la folie des hommes dans un récit haletant qui invite le lecteur à courir derrière son héros³⁶. Le chien est un ami fidèle qui aide son maître dans les pires épreuves. Il l'accompagne dans un combat difficile contre les forces du mal³⁷. Le chat enchante les tout-petits dans

³¹ L. de Brunhoff, *Babar. Coup de foudre*, Paris, Hachette, 2011.

³² G. Le Bec, *Le Roi des oiseaux*, Paris, Albin Michel Jeunesse, 2012.

³³ C. Ferey, *Krotokus I^o, roi des animaux*, Paris, Pocket Jeunesse, 2010.

³⁴ N. Coste, *Fedeylins. Les rives du monde*, Paris, Grüns, 2011.

³⁵ G. Bachelet, *Madame le lapin blanc*, Paris, Le Seuil Jeunesse, 2012.

³⁶ T. Willocks, *Dog lands, traduit de l'anglais par Benjamin Legrand*, Paris, Syros, 2012.

³⁷ J. Connolly, *Les portes*, traduit de l'anglais (Irlande) par P. Brevignon, Paris, L'Archipel,

de touchantes confessions sur les circonstances de son arrivée dans son foyer³⁸. Il sait aussi fabriquer ses propres lunettes afin de découvrir le monde tel qu'il voudrait le voir³⁹. Lorsqu'il sait jouer du piano, ce félin hyperactif a plus d'un tour dans son sac pour échapper à ceux qui veulent le produire dans un cirque. Enhardi par son succès, il part libérer tous les animaux du monde⁴⁰.

Le cheval est très présent dans la littérature pour la jeunesse. C'est un animal aristocratique qui fréquente les châtelains⁴¹. Il s'échappe d'une boîte à cigares et galope vers une montagne d'or gardée par des pirates⁴². L'étalon majestueux affiche des sentiments pleins de noblesse et de fierté⁴³; il ne se dérobe pas à son devoir lorsqu'il est enrôlé dans les tranchées de la Grande guerre. L'animal aide l'enfant à améliorer ses rapports avec la société et le remet dans le droit chemin⁴⁴. La jeune Narnia, escortée du petit cheval bleu brodé par sa mère, enfourche une vieille jument qui finira par lui sauver la vie au terme d'une série d'aventures nécessitant courage et détermination⁴⁵. Le conte moderne affectionne les voyages initiatiques jalonnés de rencontres. Celui d'une jeune taupe se déroule dans une forêt peuplée de hérissons et de coccinelles⁴⁶. Le cochon peut s'avérer être un confident plus fiable que les meilleures amies lorsqu'il s'agit de mettre à nu ses sentiments⁴⁷; mais l'ours n'en finit plus de sortir du purgatoire où il est confiné par la vieillesse et la mort⁴⁸. Son amitié avec une simple souris reste toujours scandaleuse⁴⁹. Les maladies contemporaines entrent dans l'univers des enfants. Elles frappent un pauvre renard qui ne sait plus se repérer dans le temps et s'égare dans ses propres mots. Ils devient la risée de ceux qui le craignaient naguère⁵⁰. En prêtant aux animaux les émotions des hommes tout en maintenant leur caractère, le conte moderne entend aborder par des chemins de traverse les grandes questions que se posent les enfants. Il fait une large place à la liberté en évoquant un pauvre clown chassé d'un cirque qui se venge

2010.

³⁸ H. Ardan, *Moi Milton*, Paris, La Joie de lire, 1997; *Milton. Quand j'étais petit*, Paris, La Joie de lire, 2012.

³⁹ Ch. Moundlic, *Je veux des lunettes!*, Paris, Albin Michel Jeunesse, 2010.

⁴⁰ Aki, *Pan le chat et le cirque*, Paris, Gallimard Jeunesse, 2010.

⁴¹ M. Dorléans, *L'Invité*, Paris, Le Baron perché, 2011.

⁴² R. Hoban, *Le cheval magique*, traduit de l'anglais par A. Krief, Paris, Gallimard Jeunesse, 2012.

⁴³ F. Bernard, *Cheval vêtu, Soleil noir*, Paris, Albin Michel, 2005, 2008.

⁴⁴ M. Morpurgo, *Cheval de guerre*, 1982; *Mauvais garçon*, traduit de l'anglais par D. Menard, Paris, Gallimard Jeunesse, 2012.

⁴⁵ A. Lester, *Les Chevaux de la liberté*, Paris, Nord-Sud, 2010.

⁴⁶ R. Badescu, *Tristesse et chèvrefeuille*, Paris, Albin Michel Jeunesse, 2010.

⁴⁷ O. Brenifier, *L'Amour selon Nimon*, Paris, Autrement Jeunesse, 2011.

⁴⁸ Ch. Fourvel, *Une vie d'ours*, Paris, Le Baron perché, 2012.

⁴⁹ G. Vincent, *La Naissance de Célestine*, Paris, Castermann, 2012; D. Pennac, *Le Roman d'Ernest et Célestine*, Paris, Castermann, 2012.

⁵⁰ M. Baltscheit, *L'histoire du renard qui n'avait plus toute sa tête*, adapté de l'allemand par B. Friot, Paris, Rue du Monde ed., 2011.

en ouvrant la cage des animaux⁵¹. La fréquentation des gens de cirque permet à l'enfant d'entrer dans un monde aussi atypique qu'enchanté⁵². Il y côtoie le géant aux oreilles en feuilles de chou, le lanceur de coquelicots, le dompteur de fraises sauvages et toute une ménagerie de fleurs fauves⁵³. Ces rencontres avec des personnages hors normes, au passé souvent rocambolesque, multiplient les numéros inédits d'une poésie aussi insidieuse que radicale; mais les acteurs de cette famille improbable restent inséparables d'un animal mythique et la chouette danse avec l'artiste qui défie les lois de la pesanteur⁵⁴.

Il n'est pas toujours facile de prendre le caractère mythique d'un animal pour fuir la réalité; mais un coup de pouce inattendu du destin permet parfois de prendre son envol. L'ombre de Baudelaire plane sur un jeune poète qui essuie les quolibets de ses camarades. Ses ailes immenses l'empêchent de voler⁵⁵. A force de rôder dans les contes, le loup s'est taillé une place de choix dans l'imaginaire des enfants. Il ne faut pourtant pas abuser de sa mauvaise réputation et en profiter pour l'accuser de tous les maux. Les adultes ne sont pas dupes et, à bout de patience, ils ne veulent plus croire les fabuleuses histoires que racontent les enfants⁵⁶. Le dialogue de sourd noué par un petit âne avec un vieux singe illustre l'incompréhension d'une génération qui ignore la signification du mot «souris» à l'âge de l'informatique. L'enfant ne voit plus dans le livre qu'un «petit tas de feuilles mortes» lorsque prévaut le numérique⁵⁷. Les animaux sont la réincarnation des dieux. Le héros les aide à reconquérir le royaume d'où ils ont été chassés par les géants de la glace. Le printemps pourra ainsi revenir sur terre⁵⁸. Les animaux finissent pourtant par se lasser d'être les victimes de chasseurs de trophées et ils décident de se réfugier dans une arche de Noë moderne, mystérieuse clinique de lycanthropie alpine⁵⁹. Ils mettent leurs dons en commun pour résoudre l'énigme de la disparition des hommes⁶⁰. Une autre forme de démystification du bestiaire des contes consiste à en faire l'inventaire. Les enfants puisent dans des atlas une foule d'informations sur la faune et la flore qui les entourent⁶¹. Lorsque l'aventure de l'œil confronte les éclats du toucan à ceux du rhinocéros, l'image prend le pas sur le récit et la lumière sature la vision⁶².

⁵¹ Sara, *La Revanche du clown*, Paris, Thierry Magnier ed., 2011.

⁵² I. Falconer, *Olivia fait son cirque*, Paris, Le Seuil Jeunesse, 2011.

⁵³ Fr. Clement, *Botanique circus*, Paris, Albin Michel, 2011.

⁵⁴ M. Desplechin, *Saltimbanques*, Paris, Thierry Magnier ed., 2011.

⁵⁵ A. Cousseau, *Charles à l'école des dragons*, Paris, Le Seuil Jeunesse, 2010.

⁵⁶ M. Cabrol, *C'est pas moi, c'est mon loup*, Paris, Milan ed., 2012.

⁵⁷ L. Smith, *C'est un livre*, traduit de l'anglais par J.-Fr. Menard, Paris, Gallimard Jeunesse, 2011.

⁵⁸ N. Gaiman, *Odd et les géants de glace*, Paris, Albin Michel, 2010.

⁵⁹ V. Villeminot, *Instinct*, 3 voll., Paris, Nathan, 2012.

⁶⁰ S. Schade, *L'île de Faravole*, Paris, Bayard Jeunesse, 2010.

⁶¹ V. Aladjidi, *Inventaire de la mer*, Paris, Albin Michel, 2011; A. Mizielińska, *Cartes*, Paris, Rue du Monde ed., 2012.

⁶² O. Besson, *Cornebec*, Paris, Thierry Magnier ed., 2012.

Les contes apprécient les énigmes et certains romans policiers séduisent les jeunes lecteurs par leur rythme trépidant. Les *Enquêtes de Sherlock Holmes* reprennent la célèbre affaire du «diadème de beryl», un joyau de l'empire britannique dérobé chez un riche banquier⁶³. Le flair légendaire du célèbre détective de Baker Street finit par résoudre le problème. Le sort fantômatique d'un aristocrate anglais assassin de son épouse hante une œuvre d'Oscar Wilde⁶⁴; mais le roman policier destiné aux adolescents ajoute une touche de fraîcheur à la rigoureuse froideur de l'esprit de déduction. Une traduction dépolvoisée d'un texte méconnu de Mark Twain donne envie au lecteur d'en savoir davantage sur Tom Sawyer et Huckberry Finn⁶⁵. La passion des enquêtes menées avec une pétillante malice saisit une adolescente orpheline de mère qui vit dans un manoir assez vaste pour dissimuler ses investigations à sa famille⁶⁶. De l'autre côté de l'Atlantique, Manhattant offre son décor mythique à un «conte à l'eau de rose» qui s'achève en «thriller» haletant. Le roman mêle la romance au fantastique et le dénouement éclaire le récit de manière surprenante⁶⁷. Les aventures d'un lycéen de 16 ans ménagent le suspense sans recourir à des violences excessives. L'enquête est menée à toute allure par des héros assistés d'un gamin dégourdi et de filles aux caractères dissemblables⁶⁸. L'équipe au complet comprend des personnages dissemblables qui restituent l'environnement quotidien des jeunes lecteurs. Une autre méthode d'investigation est basée sur des indices. Le jeune Erwan les cherche dans les écrits de camarades lycéens qui se trouvaient à proximité du lieu d'un crime⁶⁹. L'odyssée de collégiens partis à la recherche du premier de leur classe multiplie les rebondissements, les bons élèves étant des êtres souvent farfelus⁷⁰. Le respect de la psychologie des enfants est une condition indispensable au succès. Elle se sublime sur les ailes des anges chez un jeune homme bien décidé à faire la lumière sur les circonstances de sa propre mort⁷¹. Le jeune Vango veut découvrir le secret de ses origines et semble avoir la terre entière à ses trousses. L'imagination de l'auteur imprime un rythme fou à une course échevelée qui met en scène des personnages mystérieuse et truculents⁷². Les adolescents rêvent de rejoindre «Cherub», une officine d'espionnage née

⁶³ A. Conan Doyle, *Les Enquêtes de Sherlock Holmes*, Paris, Sarbacane, 2011.

⁶⁴ O. Wilde, *Fantôme de Canterville*, traduit de l'anglais par B. Tissier, Paris, Chaudaigne ed., 2012.

⁶⁵ M. Twain, *Tom Sawyer détective*, Paris, Sarbacane, 2010; *L'Etranger mystérieux*, traduit de l'anglais (États-Unis) par V. Le Plouhinec, Paris, Albin Michel, 2012.

⁶⁶ A. Brdley, *La mort n'est pas un jeu d'enfant*, traduit de l'anglais (Canada) par H. Hiessler, Paris, M.S.K. ed., 2011.

⁶⁷ F. Colin, *Bal de givre à New York*, Paris, Albin Michel Jeunesse, 2011.

⁶⁸ H. Coben, *A découvert*, traduit de l'anglais, Paris, Fleuve Noir ed., 2012.

⁶⁹ Y. Grevet, *Seuls dans la ville*, Paris, Syros, 2011.

⁷⁰ J.-Ph. Arrou-Vignod, *Enquête au collège. Sa Majesté P.P. I°*, Paris, Gallimard Jeunesse, 2012.

⁷¹ S. Audouin-Mamikonian, *La couleur de l'âme des anges*, Paris, Robert Laffont, 2012.

⁷² T. de Fombelle, *Vango*, t. II: *Un prince sans royaume*, Paris, Gallimard Jeunesse, 2011.

pendant la Seconde guerre mondiale⁷³. Elle recrute ses agents parmi des orphelins mineurs qui luttent dans un univers très contemporain contre des trafiquants et des terroristes⁷⁴. Le phénomène d'identification reste l'une des clés de la réussite de cette série et l'auteur anime sur Internet une véritable communauté de lecteurs. Les orphelins échappent plus facilement à la surveillance des adultes et se trouvent au centre de trépidantes aventures. Miraculeusement saufs après des accidents qui ont coûté la vie à leurs parents, ils décident de lutter en secret contre le crime organisé. Traquer le mal est une recette éprouvée de la littérature pour l'enfance; mais elle devient particulièrement savoureuse lorsqu'elle est pimentée par des ingrédients régionaux⁷⁵. Le héros peut être un jeune délinquant sympathique et railleur dont on recueille les confidences. Le conte s'efforce alors de montrer que la légende est née d'une réalité sociale beaucoup moins réjouissante⁷⁶.

Les histoires de pirates conservent leur pouvoir de séduction sur les garçons, mais les auteurs ont du mal à se faire une place dans cet univers occupé par le virevoltant personnage de Jack Sparrow⁷⁷. Une carte au trésor, des mers infestées de brigands et l'ombre menaçante de fonds de cales transformés en prison ne suffisent plus à emporter l'adhésion. Il faut y ajouter la vie picaresque d'un héros et une facilité à mêler la grande histoire à la petite. Le capitaine Massacrabord règne sans partage sur son équipage et il écume les mers en y faisant régner la terreur jusqu'au jour où son bateau accoste sur une île peuplée de créatures étranges. Le voyage reprend avec l'une d'entre elles et l'équipage s'en trouve chamboulé⁷⁸. Le milieu scolaire sert de poutre maîtresse à beaucoup de constructions de la littérature pour l'enfance. La sensibilité exacerbée de l'adolescence peut être un frein à l'intégration au lycée; mais l'amitié permet de surmonter l'obstacle, prélude au lien amoureux⁷⁹. Depuis le pensionnat de Saint Agil, les dortoirs incarnent paradoxalement un merveilleux espace de liberté dans un monde imaginaire dont la crise sert de métaphore à notre société⁸⁰; mais ils peuvent aussi être une prison dont le héros s'échappe pour retrouver la liberté en se réfugiant dans les forêts du Nouveau Monde⁸¹.

Les adolescents aiment les écoles de sorciers, les royaumes d'elfes et les repaires de vampires, mais ils ne dédaignent pas non plus les contes philosophiques et les romans historiques. Des ouvrages s'inspirent d'œuvres majeures dans des récits

⁷³ R. Muchamore, *Cherub. Henderson's Boy*.

⁷⁴ R. Muchamore, *Cherub. Le Grand jeu; Cherub. 100 jours en enfer; Chute libre; Les Survivants*, Paris, Castermann, 2009-2011.

⁷⁵ B. Puard, *Les Effacés*, t. I: *Toxicité maximale*, Paris, Hachette, 2012.

⁷⁶ E. Fontenaille, *Le garçon qui volait des avions*, Paris, Rouergue DoAdo ed., 2011.

⁷⁷ *Pirates des Caraïbes*, 4 voll.

⁷⁸ M. Peake, *Capitaine Massacrabord*, Paris, La Joie de Lire, 2011.

⁷⁹ S. Chbasky, *Le Monde de Charlie*, Paris, Sarbacane, 2012.

⁸⁰ J.-Ph. Arrou-Vignod, *Magnus Million et le dortoir des cauchemars*, Paris, Gallimard Jeunesse, 2011.

⁸¹ W. Key, *Alabama moon*, Paris, Bayard Jeunesse, 2010.

à la valeur exemplaire. Les lecteurs les plus jeunes sont emportés par les folles couleurs qui entourent Descartes⁸². L'amitié de Leibniz pour un jeune garçon sert de fil d'Ariane au «meilleur des mondes possibles»⁸³. Les théories de Marx et sa vision du capitalisme trouvent leur illustration dans un tableau très engagé de notre époque⁸⁴. Des illustrations inventives permettent à ces ouvrages de fonctionner comme des rebus ou des devinettes. Les contrastes de notre société font l'objet des réflexions philosophiques d'une jeune japonaise qui quitte sa mégalopole pour retrouver le village de sa grand-mère «de l'autre côté du monde»⁸⁵. Ce type d'ouvrage sait mêler la rêverie métaphysique à la modernité pour affirmer que la lumière est au cœur de la nuit. Le dialogue de l'adolescent et du vieux singe pose l'éternel problème de l'audace et de la prudence. Les jeunes écervelés peuvent payer de leur vie les risques de leur impatience, mais une réserve excessive les condamnerait à l'ignorance⁸⁶.

Les livres qui parlent d'Histoire aux enfants sont des succès de librairie et ils se vendent à des milliers d'exemplaires. Ces romans mettent souvent leurs jeunes lecteurs en scène. Le voyage dans le temps est devenu un classique qui consiste à envoyer des enfants dans le passé pour remettre l'Histoire dans le droit chemin. Pour retrouver une fillette enlevée par une dangereuse confrérie, il faut percer un secret de Moïse et des Tables de la Loi qui pourrait ébranler les fondements de la Bible. Les épreuves à surmonter pour y parvenir vont permettre à une héroïne craintive et fébrile de faire preuve d'un courage et d'une ingéniosité insoupçonnés⁸⁷. Les jeunes lecteurs refusent d'être de simples témoins. Ils cherchent à s'identifier aux héros et à participer à leurs aventures. Le dieu maya de la Création remet le sort de l'humanité en question et le héros doit le battre au jeu pour éviter la fin du monde⁸⁸. Le point de départ du récit peut se situer dans la famille lorsqu'une fillette née dans l'Égypte ancienne déteste l'idée de partager ses parents avec un petit frère. Elle prend la clé du désert escortée d'une cohorte de demi-dieux. La magie de l'évocation des ibis rouges et des pyramides donne une touche de réalisme à cette histoire pleine de fantaisie⁸⁹. L'Antiquité grecque n'est pas oubliée⁹⁰. Les héros vivent dans le sillage mystérieux des civilisations mycénienne et minoenne des aventures où le fantastique côtoie un vieux fond mythologique⁹¹. La boule de cristal d'un auteur précipite un collégien sous les remparts de Troie, au milieu des Achéens.

⁸² K. Maaloul, *Le Malin génie de monsieur Descartes*, Paris, Les Petits Platons ed., 2010.

⁸³ L. Courtot, *Le Meilleur des mondes possibles*, Paris, Les Petits Platons ed., 2010.

⁸⁴ R. de Calan, *Le fantôme de Karl Marx*, Paris, Les Petits Platons ed., 2010.

⁸⁵ A. Zallo, G. Zallo, *Ligne 135*, Paris, La Joie de Lire ed., 2012.

⁸⁶ P. Chamoiseau, *Le Papillon et la lumière*, Paris, Philippe Rey ed., 2011.

⁸⁷ A. Malafaye, *Le Secret de Moïse*, Paris, Plon, 2011.

⁸⁸ M. Odom, *Prophétie. Le maître du jeu*, Paris, Bayard Jeunesse, 2011.

⁸⁹ F. Bernard, F. Rocca, *Anouketh*, Paris, Albin Michel Jeunesse, 2011.

⁹⁰ R. Riordan, *Le voleur de foudre*, Paris, Hachette Jeunesse, 2010, *Le fils de Neptune*, Paris, Albin Michel Jeunesse, 2012.

⁹¹ M. Paver, *Le temps des héros*, Paris, Hachette, 2012.

Il découvre les héros d'Homère, apprend à connaître leurs périples affectifs, leurs rêves et leurs doutes. Dans les méandres de leurs humeurs, ils apparaissent souvent profondément humains et le roman veut être une introduction à la lecture de l'*Illiadé*⁹². *L'Odyssée* est l'archétype occidental de ce qu'on appelle aujourd'hui la «fantaisie»; mais les poèmes homériques relèvent d'un art peu compatible avec la science d'Hérodote. L'enfance d'Alexandre séduit le jeune lecteur qui cherche à déceler dans les enseignements d'Aristote et l'amitié d'Hephestion les signes précurseurs d'une formidable destinée⁹³. Les enfants peuvent même s'initier à la pensée des philosophes grecs avec des ouvrages plus pétillants qu'exigeants⁹⁴.

Le Moyen Age occupe une place de choix dans cette histoire universelle où de preux chevaliers combattent des puissances maléfiques. Les héros évoluent dans des mondes parallèles qui confondent la réalité avec un imaginaire peuplé de dragons, de licornes et de magiciens⁹⁵. La forêt médiévale était peuplée de multiples artisans, mais elle abritait aussi un monde merveilleux qui rendait les armes du chevalier parfaitement inutiles. Le conte se veut une mise en garde contre les stéréotypes et les idées reçues⁹⁶. La «Croisade des Enfants» (1212) est un événement authentique qui a fait le succès d'un livre de Marcel Schwob (1896) et d'un film d'André Wajda (1968). La littérature pour la jeunesse s'en est emparée en prêtant à ces enfants livrés à eux-mêmes l'intention d'endosser une armure pour justifier leur part de vérité⁹⁷. Ils veulent obtenir de Philippe-Auguste l'autorisation d'aller libérer Jerusalem et prétendent identifier la foi inébranlables de leur «Croisade des indignés» à celle des chevaliers au cœur pur⁹⁸. L'Histoire empruntant parfois des voies dangereuses, deux jeunes élèves sont chargés par leur professeur de la remettre dans le droit chemin. Ils doivent déjouer un complot visant à assassiner Blanche de Castille qui n'a pas encore mis saint Louis au monde. Ils y parviendront après avoir résolu une série d'énigmes et empêcheront ainsi tout bouleversement de la généalogie des rois de France⁹⁹. Cette littérature romancée comporte sans doute une part de vérité et elle utilise parfois des documents authentiques, mais elle présente des risques. En transposant dans le passé des situations sociales et des valeurs morales d'aujourd'hui, elle s'expose à l'anachronisme. En partant pour la Terre sainte, les chevaliers n'entendaient pas œuvrer pour une société plus juste, mais pour mériter une place au Paradis. Les enluminures sont par contre un excellent

⁹² D. Kammer, *Ma guerre de Troie*, Paris, Les Impressions nouvelles Jeunesse ed., 2011.

⁹³ V. Koenig, *Alexandre, le prince conquérant*, Paris, Belin Jeunesse, 2012.

⁹⁴ S. Mokkadem, *Socrate amoureux*, Paris, Les Petits Platons ed., 2011.

⁹⁵ L. Gallego Garcia, *Idhum*, traduit de l'espagnol par M.-J. Lamorlette, Paris, Bayard Jeunesse, 2010.

⁹⁶ A. Vaugelade, *Le chevalier et la forêt*, Paris, L'Ecole des Loisirs ed., 2012.

⁹⁷ K. Pearson, *Le jeu du chevalier*, traduit de l'anglais (Canada) par A. Seelow, Paris, Albin Michel, 2011.

⁹⁸ J. Cassabois, *1212. La Croisade des Indignés*, Paris, Le Livre de poche jeunesse ed., 2012.

⁹⁹ A. Laloum, *Via temporis. Le Trésor oublié des templiers*, Paris, Strimeo Jeunesse ed., 2011.

moyen didactique pour éveiller le sens artistique des enfants. Les scènes figurées de personnages bibliques, les monstres mythologiques, les châteaux et les cathédrales offrent des images aussi vivantes que les marges frémissantes d'insectes et de fleurs. Chez certains personnages, le dessin évoque intensément la force d'un sentiment. Cet apprentissage de la lecture d'images contribue à dissiper l'idée trompeuse d'un Moyen Age obscur et replié sur lui-même¹⁰⁰.

Le tourisme chronologique de la littérature historique pour l'enfance s'attarde sur une date, un lieu emblématique, un texte ou un personnage¹⁰¹. Ces coups de projecteur relèvent d'un art de l'ellipse qui ménage l'ouverture sur le mystère. Versailles et le «roi-soleil» figurent parmi les sujets les plus souvent traités¹⁰². Les reines font toujours rêver les jeunes lectrices et les livres sur Marie-Antoinette ou l'impératrice Sissi se vendent sans discontinuer. Les pensionnaires de la maison royale de Saint Cyr voulaient entrer dans le monde alors que la littérature pour la jeunesse leur prête des destins imaginaires d'émancipation féminine pour faire rêver ses lectrices¹⁰³. L'Histoire ignore les bons sentiments et on ne peut l'utiliser à des fins morales qu'en prenant des libertés avec elle. Un orphelin s'accroche à la vie et s'efforce de retrouver ses parents biologiques dans le Paris du siècle des Lumières où son esprit s'ouvre aux idées de Rousseau, Voltaire et Diderot¹⁰⁴. L'initiation intellectuelle fait place au voyage initiatique du jeune Anacharsis; il occupe l'existence de plusieurs personnages ce qui l'autorise à s'aventurer de la condition servile à celle d'un homme libre¹⁰⁵. L'esclavage apporte enfin son lot d'injustices au petit orphelin noir inventeur du processus de création de la vanille qui fait la fortune des planteurs. Le noir est bien la couleur authentique de ce fruit qui rapporte tant aux Blancs¹⁰⁶.

La profusion de traductions d'ouvrages en langue anglaise privilégie l'ère victorienne et le bicentenaire de la naissance de Charles Dickens a permis d'exhumer des textes peu connus du célèbre auteur britannique¹⁰⁷. On y retrouve les personnages du jeune lord et de la petite princesse qui côtoient l'enfant abandonné dormant sous les ponts de Londres. Il faut beaucoup d'impétuosité à l'héroïne Millie Plume pour surmonter des séparations déchirantes¹⁰⁸. Le fantôme d'un jeune garçon délaissé par ses parents hante la maison d'un vieillard en quête de tranquillité. Après de vifs échanges, les

¹⁰⁰ B. Fontanel, *Merveilleux Moyen Age*, Paris, Palette ed., 2010.

¹⁰¹ J.M. Billioud, *L'Histoire de France*, Paris, Gallimard Jeunesse, 2011.

¹⁰² A. Pietri, *Les Orangers de Versailles*, Paris, Bayard Jeunesse, 2000.

¹⁰³ A.-M. Desplat-Duc, *Les Colombes du Roi-Soleil*, Paris, Flammarion-Père Castor.

¹⁰⁴ K. Vereecken, *Léon ou les confessions d'un orphelin ordinaire*, traduit du néerlandais (Belgique) par E. Sandron, Paris, Bayard Jeunesse, 2012.

¹⁰⁵ A. Cousseau, *Les Trois Vies d'Antoine Anacharsis*, Paris, Rouergue ed., 2012.

¹⁰⁶ S. Cherer, *La vraie couleur de la vanille*, Paris, L'Ecole des Loisirs ed., 2012.

¹⁰⁷ M.-A. Murail, *Charles Dickens*, Paris, L'Ecole des Loisirs ed., 2005; C. Dickens, *De grandes espérances*, traduit de l'anglais par M.-A. Murail, Paris, L'Ecole des Loisirs ed., 2012.

¹⁰⁸ J. Wilson, *Les malheurs de Millie Plume*, traduit de l'anglais par C. Dutheil de la Rochère, Paris, Gallimard Jeunesse, 2011.

deux protagonistes finissent par s'apprécier et en viennent aux confidences¹⁰⁹. Il s'avère pourtant que si la jeunesse s'épanouit volontiers dans ses rapports avec des camarades, elle se montre tranchante et sans indulgence pour les adultes taxés d'enquiquineurs. Un garçonnet difforme mais doté du don de la métamorphose reçoit une éducation classique doublée d'une formation digne d'un James Bond victorien qui lui permet d'affronter une confrérie spécialisée dans le rapt des orphelins¹¹⁰. La jeune demoiselle Pénélope Green doit forcer sa nature et s'affranchir de la condition faite aux femmes dans l'Angleterre victorienne pour poursuivre des trafiquants d'enfants jusque dans les bas-fonds de l'East End londonien¹¹¹. La route de l'émancipation féminine est jalonnée d'épreuves qui plongent l'héroïne dans le monde sordide d'Olivier Twist; mais elle les surmonte grâce à une détermination délicate et sauvage dans laquelle l'auteur croit retrouver les caractéristiques de la campagne anglaise¹¹². Une innovation de la littérature pour l'enfance consiste à exploiter le spiritisme en vogue pour transformer l'existence d'une jeune blanchisseuse¹¹³. Le récit évolue dans le décor mythique des lieux imaginaires anglais et américains de la fin du XIX siècle. Les personnages se meuvent dans le monde des vampires londoniens dans une succession frénétique de péripéties destinées à stimuler l'imagination des jeunes lecteurs¹¹⁴. Le roman historique privilégie les époques riches en enjeux qui polarisent l'attention. Le «moment 1900» en fait partie, sur fond de critique de la deuxième «révolution industrielle». La génération post-victorienne en quête de valeurs nouvelles veut mettre la création artisanale à la portée de tous; elle se tourne vers le spiritualisme de la théosophie et un style de vie fait d'amour libre et d'émancipation féminine. Les enfants grandis dans ces utopies voient leurs rêves se briser sur un monde éclaté qui sombre dans le carnage des tranchées de 1916 entre Somme et Yser¹¹⁵. Il s'en dégage une morale faite d'exigence de vérité et de fidélité aux émotions violentes de l'adolescence. L'Histoire s'efface au profit de la magie des fées dans un herbier de la forêt de Brocéliande¹¹⁶.

Le voyage dans le temps n'oublie pas les commémorations. L'année 1912 est celle de l'inoubliable «Guerre des boutons» où fleurissent les régionalismes et

¹⁰⁹ K. Klise, S. Klise, *43, rue du Vieux cimetière*, traduit de l'anglais (Etats-Unis) par M. Gaboriaud, Paris, Albin Michel Jeunesse, 2012.

¹¹⁰ A. Slade, *La Confrérie de l'Horloge*, traduit de l'anglais par M. Cambolien, Paris, Jean-Claude Lattès ed., 2010.

¹¹¹ B. Bottet, *Penelope Green. La chanson des enfants perdus*, Paris, Castermann, 2011.

¹¹² M. Rosoff, *La ballade de Pell Ridley*, traduit de l'anglais par Dorothee Zumstein, Paris, Albin Michel, 2012.

¹¹³ M. Hooper, *Velvet*, traduit de l'anglais par F. Ladd, P. Duez, Paris, Les Grandes personnes ed., 2012.

¹¹⁴ F. Colin, *Les Etranges Sœurs Wilcox*, t. 2: *L'Ombre de Dracula*, Paris, Gallimard Jeunesse, 2010.

¹¹⁵ A.S. Byatt, *Le Livre des enfants (The children's book)*, traduit de l'anglais par L. Petit, P. Bataillard, Paris, Flammarion, 2012.

¹¹⁶ S. Perez, *L'Herbier des fées*, Paris, Albin Michel Jeunesse, 2011.

les gros mots. L'auteur Louis Pergaud, mort au champ d'honneur, méritait une réédition annotée et complétée¹¹⁷. Le naufrage du «Titanic» frappe toujours les esprits. Un jeune rescapé rejoint deux adolescents miraculeusement sauvés de l'explosion d'un avion et des flammes d'un incendie. Les trois héros sont chargés d'intervenir dans le passé afin de réparer les dégâts commis par les adultes¹¹⁸. L'éloignement du monde réel offre aux jeunes lecteurs un pouvoir d'exaltation de l'imaginaire transfiguré par la séduction du passé. La jeune Lucy confie ses peines à un journal intime. Nous sommes en 1936 dans une région rurale du Canada ravagée par la Grande Dépression et la sécheresse. L'héroïne, âgée de 13 ans, s'insurge contre les règles et les interdits familiaux jusqu'à l'arrivée d'un médecin progressiste qui bouleverse sa perception de l'ordre établi¹¹⁹. L'Histoire n'est qu'une toile de fond se profilant derrière une crise d'adolescence fort bien décrite. Les enfants y piochent à leur fantaisie, dans une parfaite déstructuration ludique. A Shangai, au début de la guerre sino-japonaise, un gamin des rues escorte la fille d'un riche commerçant. Ces rencontres de deux personnages antinomiques sont classiques dans une littérature pour l'enfance soucieuse de renverser les barrières sociales¹²⁰. La guerre d'Espagne n'est pas oubliée avec son cortège de souffrances. Un jeune réfugié fait son apprentissage politique dans un camp français de rétention. Il découvre le prix de l'engagement militant et la force de la solidarité partisane au moment des orages¹²¹.

Les adolescents apprécient l'histoire des guerres mondiales, mais ce sont les sévices des déportations qui leur sont le plus souvent proposés. La reconstitution de l'itinéraire de deux enfants lithuaniens déportés par les Soviétiques en Sibérie est décrite avec réalisme¹²². La leçon de l'ouvrage réside dans la conception de la vie de l'héroïne. Le national-socialisme est à l'origine des épisodes les plus cruels. Un jeune américain décide de se rendre dans une île écossaise où son grand-père orphelin a dû se réfugier pour fuir la menace nazie. Il y retrouve les récits fabuleux de son aïeul mêlés de fragments de vérité sur sa vie¹²³. Les thèmes du racisme et de l'antisémitisme sont largement abordés. Un ours en peluche les découvre avec la déportation pendant la Seconde guerre mondiale¹²⁴. Le même auteur gomme symboliquement les différences entre un grand nain et un petit géant¹²⁵. Le récit est imprégné d'images empruntées aux maîtres allemands du Moyen Age et de la Renaissance, aux caricaturistes et aux satiristes français

¹¹⁷ L. Pergaud, *La guerre des boutons*, Paris, Le Livre de poche ed., 2011.

¹¹⁸ A. Scarrow, *Time Riders*, traduit de l'anglais par Aude Lemoine, Paris, Nathan, 2012.

¹¹⁹ N. Huston, *Ultraviolet*, Paris, Thierry Magnier ed., 2011.

¹²⁰ J.-M. Omont, *La ballade de Yaya*, Paris, Fei ed., 2012.

¹²¹ V. Goby, *Antonio ou la résistance. De l'Espagne à la région toulousaine*, Paris, Autrement Jeunesse ed., 2011.

¹²² R. Sepetys, *Ce qu'ils n'ont pas pu nous prendre*, traduit de l'anglais (Etats-Unis) par B. Formentelli, Paris, Gallimard Jeunesse, 2011.

¹²³ R. Riggs, *Miss Peregrine et les enfants particuliers*, Paris, Bayard, 2012.

¹²⁴ T. Ungerer, *Otto*, Paris, L'Ecole des Loisirs ed. 1999.

¹²⁵ T. Ungerer, *Amis-Amies, Zloty*, Paris, L'Ecole des Loisirs ed., 2007, 2009.

ainsi qu'aux dessins animés anglo-saxons¹²⁶. Il dépasse les clivages moraux du Bien et du Mal, en estimant qu'ils peuvent s'influencer réciproquement. La déportation des Juifs figure en bonne place. Une enfant se réfugie en Angleterre d'où elle suit la tragédie, tiraillée entre l'amour de sa famille adoptive et sa fidélité aux parents restés en Allemagne¹²⁷. Poignante sans rhétorique inutile, l'histoire de Marie qui sera assassinée en Pologne en 1944 éclaire la réalité des camps de concentration¹²⁸. Les files d'attente interminables devant des boutiques en pénurie permanente et l'omniprésence de la police d'Etat sont le lot quotidien d'une fillette que le communisme empêchera de dormir bien des années après sa chute¹²⁹. La trilogie *No pasaran* est une fresque sanglante et partisane du XX siècle dans laquelle plongent trois adolescents passionnés de jeux vidéo. Ce plaidoyer contre la guerre et le racisme transporte le lecteur du *Chemin des Dames* (1917) à la guerre d'Espagne et à la *Rafle du Vel' d'Hiv* (1942) dans un conte fantastique qui oscille entre le roman policier social et la fable historique¹³⁰. Seuls les témoignages directs, comme celui d'Anne Franck, peuvent respecter la vérité historique¹³¹. Le conte à prétention historique se contente d'aventures épiques ou fantastiques et ses images d'Epinal négligent les forces profondes de l'Histoire. Le récit sert moins à progresser vers une conclusion qu'à donner toute leur force aux images, comme si la quête importait plus que son objet. L'Histoire est prétexte à l'éveil des consciences des jeunes lecteurs et à la formation de leur caractère.

Sans être dépassée dans ses principes, la morale des fables a perdu de son actualité et elle ne la conserve que pour les enfants sages¹³². Elle échappe à la psychologie des enfants d'aujourd'hui qui s'étonnent de certaines de ses maximes. Comment peut-on vivre heureux en étant caché ou préférer la pauvreté aux paillettes dans une société hédoniste et narcissique? Les enfants aiment rire et se moquent de savoir qui rira le dernier. Leur soif de liberté ne peut tolérer qu'elle soit ôtée aux animaux. Les contes montrent qu'un soupçon d'intelligence l'emporte sur le recours à la force, les plus durs pouvant avoir bon cœur. Le talent peut être taxé de faiblesse par ceux qui n'en ont pas. Les contes modernes ne se contentent pas de peindre des enfants directement confrontés aux valeurs de notre société. Ils s'interrogent sur des questions d'actualité qui concernent la crise économique, l'effet de serre, le conflit israélo-palestinien, la justification de la fiscalité, la présence d'étrangers clandestins, le racisme, le

¹²⁶ T. Willer, *Tomi Ungerer et ses maîtres. Inspirations et dialogues*, Strasbourg, 2011.

¹²⁷ A.C. Voorhoeve, *Ziska*, Paris, Bayard Jeunesse, 2012.

¹²⁸ J. Saglier, *Je m'appelle Marie*, Paris, Gallimard Jeunesse, 2011.

¹²⁹ N. Budden, *Choisis quelque chose, mais dépêche-toi!*, traduit de l'allemand par V. Hauptmann, Paris, L'Agrume ed., 2012.

¹³⁰ Ch. Lehmann, *No pasaran, le jeu; No pasaran, endgame*, Paris, L'Ecole des Loisirs ed. 1996, 2012.

¹³¹ U. Orlev, *Poèmes écrits à Bergen-Belsen en 1944, en sa treizième année*, Paris, Editions de l'Eclat, 2011.

¹³² J.-M. Maulpoix, *Journal d'un enfant sage*, Paris, Mercure de France, 2010.

droit à la différence, les préjugés ou l'injustice¹³³; mais la remise en cause d'une société aux règles trop rigides relève moins de la contestation sociale que du rejet des contraintes familiales. Les histoires de famille fourmillent d'événements qui sont autant de révélations cruciales en libérant des sentiments enfouis au tréfonds de l'enfance. La vie d'un adolescent n'est pas toujours facile, mais elle peut devenir un vrai cauchemar. Il faut beaucoup de talent et une grande douceur pour apaiser les blessures de l'enfance liées à ses origines, en évoquant avec délicatesse des thèmes aussi durs que le déni de grossesse, l'abandon d'un nouveau-né et la stigmatisation qui s'ensuivent¹³⁴. Une adolescente amnésique qui se retrouve sans famille se cherche d'autant plus qu'elle ne sait rien de son passé. Des rencontres vont lui apprendre à apprivoiser ce manque et à combler ce vide. La mémoire et les souvenirs aident à forger une personnalité¹³⁵. Le divorce des parents est parfois accepté avec philosophie, mais la révélation de l'homosexualité paternelle fait vaciller tout un univers¹³⁶. Les adolescents vivent parfois des situations de détresse face aux moments de dépression que traversent leurs parents. Les contes d'aujourd'hui leur offrent du réconfort auprès de personnes marquées par la maladie qui savent trouver les mots pour leur donner des explications¹³⁷. L'auteur doit se glisser dans l'âme d'un enfant complexé dont les rêves semblent inaccessibles pour traduire tout ce que sa souffrance présente d'incommunicable. Ce passage à l'âge adulte est vécu comme un abandon d'une partie de soi-même dont on conservera toujours la nostalgie. Les enfants en attendent des explications plus que des leçons¹³⁸. Une forte pression s'exerce sur eux pour qu'ils grandissent vite et elle peut devenir une source d'angoisse lorsque les adultes leur présentent l'avenir sous des jours sombres¹³⁹. Les états d'âme de l'adolescence sont irrésistiblement liés au portrait de la famille et à la découverte du monde qui l'entoure¹⁴⁰. Ils peuvent enfermer l'individu dans la solitude des jugements sans appel où se forge la carapace d'un être incompris autant qu'incompréhensible¹⁴¹. Les enfants qui ouvrent des boîtes renfermant les objets précieux de leurs parents ont toujours droit à des révélations cruciales. Hantée par des secrets de famille, l'aventure initiatique passe par une mort symbolique suivie d'une renaissance qui n'oublie pas le

¹³³ L. Lionni, *Tico et les ailes d'or*, traduit de l'anglais par A. Peltreau-Villeneuve, Paris, L'Ecole des Loisirs ed., 2012.

¹³⁴ Elzbieta, *L'Ecuyère*, Paris, Rouergue ed., 2011.

¹³⁵ M. Delerm, *Jeanne cherche Jeanne*, Paris, Folio Junior ed., 2012.

¹³⁶ A.M. Homes, *Jack*, traduit de l'anglais (Etats-Unis) par J. Argueyrolles, Paris, Actes Sud junior, 2011.

¹³⁷ G. Paris, *Au pays des kangourous*, Paris, Don Quichotte ed., 2012.

¹³⁸ J. Schalit, *Professeur Gamberge*, Paris, Gallimard Jeunesse, 2010.

¹³⁹ F. Bernard, *Cleo*, Paris, Nil ed., 2010.

¹⁴⁰ C. Desmarteau, *Le Petit Gus fait sa crise*, Paris, Albin Michel Jeunesse, 2010.

¹⁴¹ R. Couaillet, *Contre courants*, Paris, Actes Sud junior, 2011; O. Charpentier, *Mauvaise graine*, Paris, Gallimard Jeunesse, 2010.

passé sans s'y enfermer¹⁴²; mais la poésie des contes peut tourner au drame. Une gamine ordinaire sombre dans l'isolement lorsque ses parents vouent une admiration sans borne à leur fille aînée, brillante élève et être d'exception. Cette descente aux enfers devient vertigineuse à la mort du seul proche sachant la prendre au sérieux. Un geste désespéré peut pourtant être l'occasion d'une prise de conscience et rendre brusquement le goût à la vie¹⁴³. La perte d'un enfant inflige souvent une blessure inguérissable à laquelle bien des couples ne peuvent survivre. Pour parler de la mort, la littérature pour l'enfance s'ouvre à la tristesse et à la tendresse. Elle évoque les histoires inépuisables du grand-père, la cuisine de la grand-mère et sa patience infinie afin d'en adoucir les effets¹⁴⁴. Les contes insistent sur les difficultés de communication entre parents et enfants. Un père divorcé ne sait comment reconquérir sa fille, dans l'incapacité où il se trouve de lui dévoiler ses sentiments, pendant qu'un enfant précoce observe le monde en interrogeant la conscience des adultes¹⁴⁵. La passion de cet âge pour la musique peut être un refuge où fuir une famille désunie¹⁴⁶. La fugue est un moyen d'évasion classique. Elle conduit à New York une jeune fille que sa mère croit cloîtrée dans sa chambre, aussi bien qu'un adolescent orphelin de mère qui cherche à retrouver son père. Ils vivent l'un et l'autre des aventures surprenantes, plongés dans les secrets du Museum d'histoire naturelle de la grande métropole américaine¹⁴⁷. La puberté arrive sans crier gare et elle annonce une révolution. Cette métamorphose contraint chacun à réévaluer sa place en fonction d'un tel bouleversement. Les sentiments se bousculent en pleine confusion dans les têtes et dans les cœurs¹⁴⁸. Les premières relations sexuelles surviennent avec l'incapacité des parents à faire partager leurs expériences, la censure des mots, l'envie et la peur¹⁴⁹.

Les enfants aiment s'identifier à des héros épris de liberté et assoiffés de justice, entraînés dans des aventures trépidantes qui mettent leur détermination à l'épreuve. Les parents sont généralement absents de ces contes où les héros vivent libres comme l'air, affranchis des contraintes de la famille et de la société. Ces personnages mythiques sont aidés par des animaux fétiches au profil stylisé, facétieux et parfois farfelus, mais dotés de pouvoirs surnaturels. Le groupe

¹⁴² J. Boyne, *Noé Nectar et son voyage étrange*, traduit de l'anglais (Irlande) par C. Gibert, Paris, Gallimard Jeunesse, 2012.

¹⁴³ M. Halberstadt, *La petite*, Paris, Albin Michel, 2011.

¹⁴⁴ C. Naumann-Villemin, *L'Enterrement*, Paris, Kaléidoscope ed., 2010; N. Carlain, *Le Pépé de mon pépé*, Paris, Elan Vert ed., 2010.

¹⁴⁵ D. de Vigan, T. de Fombelle, C. Vermalle, *Nouvelles contemporaines*, Paris, Le Livre de poche jeunesse, 2012.

¹⁴⁶ Y. Prinz, *Princesse Vinyle*, traduit de l'anglais (Etats-Unis) par M. Nasalik, Paris, Albin Michel Jeunesse, 2012.

¹⁴⁷ B. Selznick, *Black out*, Paris, Bayard Jeunesse, 2012.

¹⁴⁸ J. Han, *L'été où je suis devenue jolie*, traduit de l'anglais (Etats-Unis) par A. Delarbre, Paris, Albin Michel, 2010.

¹⁴⁹ M. Burgess, *Junk*, traduit de l'anglais par L. Devaux, E. Casse-Castric, Paris, Gallimard Jeunesse, 2011.

forme une petite communauté d'individus aux caractères dissemblables et même antagonistes. Les héros mènent des enquêtes tambour battant contre les forces du mal, combattent l'obscurantisme et se posent en redresseurs de torts. Ils traversent avec une insouciance qui n'exclut pas des moments d'angoisse des zones d'épouvante à la fantaisie parfois proche du burlesque. La syntaxe reste simple afin de ne pas rebuter les enfants et le conte offre une alliance d'actes répétitifs qui échappent à la monotonie par des surprises constamment renouvelées. Le lecteur voyage dans le temps au gré d'interventions magiques, de métamorphoses et de sociétés secrètes¹⁵⁰. Les constructions sont complexes, avec des temps et des scènes qui se télescopent dans des intrigues à suspense et à rebondissements¹⁵¹. Les rêves les plus irréalisables se subliment dans un monde plein de mystère où les plus faibles voient leurs talents reconnus. La raison s'incline devant l'infinité des choses qui la dépassent. Le fantastique et la magie en font partie, mais l'amour vient rarement retourner les âmes et les diriger vers une nouvelle lumière¹⁵².

¹⁵⁰ M. Pope, *La flûte enchantée*, Paris, Bayard, 2010.

¹⁵¹ G. Del Ponte, *Les Invisibles*, t. 1: *Le Secret de Misty Bay*, traduit de l'italien par Françoise Langrognet, Paris, Prisma ed., 2011.

¹⁵² M. Lonsdale, *L'Amour sauvera le monde*, Paris, Philippe Rey ed., 2011.

Forum / Discussioni

Scuola, società e democrazia. A proposito di un recente lavoro sulla storia della scuola nell'Italia del Novecento

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School, society and democracy. About a recent publication on the history of schools in twentieth-century Italy

ABSTRACT: The recently published book by Francesco Susi, entitled *Scuola, società, politica, democrazia. Dalla riforma Gentile ai decreti delegati* ('School, society, politics, democracy. From Gentile Reform to delegated decrees', 2012), offers a significant occasion to re-analyse the role which the Italian school played in nineteenth-century history, through an examination particularly attentive to the parallel development of the political history of the Country – from Fascism to anti-Fascism, from the role of schools in the new Republican Constitution to the State-Church relationship, in other terms in the general framework of the history, evolution, metamorphosis and involutions of civil society. In particular, the book poses itself in the perspective of a renovated historiographical attention towards the relationship between schools and the reality of the political and labour union associations.

EET/TEE KEYWORDS: History of Education; School; Educational Policy; Social Changes; Italy; XX Century (Book Review).

Forse più che in altri Paesi dell'area occidentale, in Italia, nel novero delle conseguenze della crisi economica va incluso il pericolo di una forte contrazione delle risorse destinate all'istruzione pubblica e, dunque, l'insidia di un inevitabile arretramento della crescita culturale e sociale della popolazione. Si tratta di una realtà allarmante se si pensa che la qualità della formazione e della ricerca non rappresenta soltanto un'opportunità importante nella vita di ogni individuo ma che essa determina il futuro sviluppo di una intera collettività sociale e politica.

Il recente volume di Francesco Susi, *Scuola, società, politica, democrazia. Dalla riforma Gentile ai decreti delegati* (2012)¹ rappresenta una significativa occasione per riflettere sul ruolo svolto dalla scuola italiana nella storia dell'Italia del Novecento, grazie ad un'analisi strettamente intessuta nella storia politica del nostro paese – dal fascismo all'antifascismo, dal ruolo della scuola nella costituzione repubblicana al rapporto fra stato e chiesa, alla storia della società civile, del suo sviluppo, delle sue metamorfosi e delle sue involuzioni.

Il volume si colloca in un clima di accresciuta attenzione, in ambito storiografico, nei confronti del rapporto fra le istituzioni scolastiche e il mondo dell'associazionismo politico e sindacale.

Gli studi più recenti hanno posto con sempre maggiore evidenza la necessità di liberare l'indagine storiografica dai limiti del descrittivismo positivista, che pure aveva svolto nel primo Novecento una funzione innovatrice rispetto alla tradizione precedente, e dalla discussa tendenza neo-idealistica a esaurire la storia dell'educazione nella storia delle teorie pedagogiche.

L'indagine storiografica relativa all'istruzione e all'educazione viene, oggi, ripensata alla luce di nuove metodologie e di approcci interpretativi ancora per molti aspetti inesplorati. Alla base di questo rinnovamento, c'è, innanzitutto, l'esigenza di non ricadere in quella discutibile frantumazione conoscitiva che tendeva a porre in ambiti distinti l'analisi dello sviluppo storico-politico delle istituzioni scolastiche, il ruolo delle teorie pedagogiche e la storia dell'educazione come fenomeno iscritto nella sfera dell'etica, del costume, dei comportamenti privati individuali e collettivi.

Si avverte sempre di più, infatti, l'esigenza di ricostruire i nessi fra queste diverse dimensioni.

È proprio questo uno dei primi obiettivi che si è proposto Francesco Susi con la sua indagine, contribuendo così a capovolgere un paradigma interpretativo tradizionale: conoscere la società per capire la scuola. Il volume di Francesco Susi ci suggerisce in un certo senso che è necessario capire e conoscere la scuola per decodificare la società.

I livelli e la qualità dell'istruzione di una popolazione sono infatti determinanti nella formazione dei ceti dirigenti, del ceto politico e imprenditoriale, della coscienza delle classi lavoratrici, della crescita della soggettività femminile e, infine, della possibile emancipazione dei ceti considerati marginali. La qualità e i livelli di istruzione possono spiegare, ad esempio, la maggiore o minore disponibilità a quella colonizzazione dell'immaginario di cui Susi ci parla in forma molto suggestiva nelle conclusioni, citando il pensiero di Marc Augé. La colonizzazione dell'immaginario produce un pensiero unico e onnipervasivo che esclude l'ipotesi di ogni forma di esistenza differente e la possibilità di costruire

¹ F. Susi, *Scuola, società, politica, democrazia. Dalla riforma Gentile ai decreti delegati*, Roma, Armando, 2012.

prospettive diverse perché tutto concorre a farci credere che la storia sia finita e che il mondo sia un spettacolo nel qual quella fine viene rappresentata.

Si può affermare che ogni tempo, ogni società ha la sua scuola.

Con Antonio Gramsci, il cui pensiero viene spesso richiamato nel volume come imprescindibile punto di riferimento, si può anche sostenere che ogni gruppo sociale ha un suo tipo di scuola destinato a perpetuare, in quegli strati o ceti, una determinata funzione tradizionale, direttiva o strumentale.

Allo stesso tempo si può sostenere che ogni sistema scolastico ha avuto una sua 'storia'.

Basti pensare, ad esempio, agli studi maturati fra Otto e Novecento, nei quali la storia della scuola era funzione dell'idea risorgimentale e della nascita della nazione o alla storiografia degli anni del fascismo ridotta a propaganda e a cassa di risonanza del regime. In quegli studi, la scuola si poneva come provincia di ideologie imposte e acriticamente professate.

In Italia, solo a partire dal secondo dopoguerra gli studi sulla scuola hanno acquistato uno spessore conoscitivo di tipo nuovo.

La scuola non è stata più oggetto di interesse esclusivo da parte dei pedagogisti e degli esperti del settore, è diventata ineludibile campo d'indagine da parte di economisti, sociologi, storici. A partire da allora non è stato pensabile ricondurre la storia della scuola nel circoscritto recinto di leggi e decreti, di ordinamenti scolastici e di circolari ministeriali. Grazie al rinnovamento storiografico maturato nel Novecento, la storia della scuola, come il volume di Francesco Susi mette ben in evidenza, è diventata la storia di soggetti reali, di insegnanti e allievi, di dispositivi simbolici e di materialità educative, di permanenze di contraddizioni.

Marzio Barbagli in *Disoccupazione intellettuale e sistema scolastico* (1974) ha sostenuto in proposito:

Ricostruire e spiegare le caratteristiche e l'andamento dell'istruzione in Italia negli ultimi cento anni non è certo cosa facile. Alle difficoltà che un'impresa del genere normalmente comporta se ne sono aggiunte negli ultimi tempi altre e più gravi. Sembra quasi che tanto più l'istruzione si estende, abbraccia tutti, si fa una realtà solida e corposa, tanto più essa ci scappi, diventa difficile afferrarla, penetrarla comprenderla. I nostri castelli concettuali, costruiti con anni di fatiche e di lavoro, si sono rivelati labili costruzioni di sabbia, i nostri schemi e le nostre ipotesi interpretative ferri vecchi arrugginiti. Ma soprattutto è cambiato il nostro atteggiamento verso l'istruzione e la fiducia illimitata che nutrivamo in essa è entrata in crisi².

Offre un contributo prezioso alla comprensione di questi problemi il volume di Susi, che opportunamente mette in relazione, a partire dal titolo, ambiti come scuola, società, politica e democrazia. Come emerge da una attenta analisi ricchissima di fonti e di riferimenti al dibattito storiografico, il concorso

² M. Barbagli, *Disoccupazione intellettuale e sistema scolastico*, Bologna, il Mulino, 1974, p. 11.

della politica, della società, dell'economia e delle organizzazioni sindacali è indispensabile a un decollo della scuola pubblica intesa come motore dello sviluppo delle coscienze, di una nuova cittadinanza e dunque di rapporti sociali autenticamente democratici.

Il volume prende le mosse dall'andamento dello sviluppo del sistema scolastico dall'Unità al fascismo. La ricerca non si limita a ricostruire le vicende dell'istituzione ma mette al centro i suoi attori, gli insegnanti e l'associazionismo sindacale e di categoria, gli studenti e i movimenti, le donne, il Sud. La lotta contro l'analfabetismo, che ha caratterizzato le politiche scolastiche del nuovo Regno già a partire dai primi decenni post-unitari, appare, nel volume, indissolubilmente collegata al permanere di una visione fortemente gerarchica della vita sociale ancora presente nella concezione del mondo e negli assetti ideologici dei ceti dirigenti liberali.

Nel contesto arretrato del nuovo Regno – si legge nel volume – alla diffusa e profonda miseria si accompagnavano i bassissimi livelli di istruzione della popolazione, con un tasso medio di analfabetismo del 78% sull'intera popolazione nazionale (72% maschile, 84% femminile, con picchi più elevati nel mezzogiorno e nelle Isole). Nel 1862-1863, solo l'8,9 per mille della popolazione in età fra gli 11 e 18 anni riceveva un'istruzione postelementare. Nello stesso periodo, la percentuale di italiani in grado di parlare la lingua nazionale corrispondeva appena all'8 per mille del totale³.

L'uso quasi esclusivo del dialetto determinava, inoltre, la permanenza di tradizioni culturali differenziate e poco comunicanti fra di loro e che ha reso ancora più complesso il processo di creazione di una unità nazionale e linguistica che è stato uno dei primi compiti dello stato unitario e ha reso la scuola anche una sorta di laboratorio interculturale *ante litteram*. È opinione oramai ampiamente condivisa che la situazione linguistica dell'Italia appena unificata era in definitiva uno degli aspetti più emblematici in cui si palesavano le profonde fratture che nel percorso storico si erano create non solo fra le diverse realtà locali ma anche tra le condizioni di vita delle classi sociali esistenti nel territorio della penisola.

Il volume mette opportunamente in luce, inoltre, il ruolo svolto nella storia della scuola italiana da maestri e maestre come agenti culturali della formazione dell'identità nazionale, della diffusione di nuove norme igieniche, di un'istruzione popolare contenuta entro precisi confini di saperi assai sorvegliati. In questo contesto si consolida anche il fenomeno della femminilizzazione dell'insegnamento elementare, questione nata nell'Ottocento sulla base di motivi salariali e di argomentazioni moralistiche ma ancora presente nella realtà attuale per via del permanere di una ambigua equazione fra donne e professioni educative e di cura.

³ Susi, *Scuola, società, politica, democrazia. Dalla riforma Gentile ai decreti delegati*, cit. p. 18.

Va segnalata, inoltre, l'attenzione dedicata alla nascita, nel 1962, della scuola media unica e agli sviluppi successivi fino ai Decreti delegati del 1974 come momento alto di partecipazione democratica. La scuola media unica ha svolto, pur entro limiti e contraddizioni rilevanti, secondo Susi, un ruolo importante come momento di svolta nella democratizzazione della vita scolastica, a partire dall'iniziativa del PCI di presentare nel 1959 un progetto di Legge Donini-Luporini sulla istituzione della «Scuola obbligatoria statale dai sei ai quattordici anni» che diviene legge (varata il 31.12.1962) con la denominazione di «Scuola media statale».

Un vero terremoto in una scuola che – sottolinea Susi – disponeva di un corpo docente ancora sconcertato dalla mescolanza nei banchi di scuola di ceti sociali così diversi fra di loro.

Susi mette opportunamente in rilievo, a questo proposito, la centralità della questione del latino, che era stata dirompente nel dibattito parlamentare e che fu risolta stabilendo che lo si sarebbe insegnato nel secondo anno come integrazione dell'italiano. L'insegnamento del latino tornava poi facoltativo nella terza classe, ma rimaneva requisito necessario per l'iscrizione al liceo classico (l'insegnamento del latino nella scuola media venne poi definitivamente eliminato nel 1979).

La persistenza del latino manteneva – secondo Susi – la tradizionale distinzione fra cultura aristocratica e cultura popolare che aveva fin lì caratterizzato l'ordinamento scolastico e costituiva, all'interno di una scuola diventata ora comune, l'ultima possibilità di una discriminazione socio-economica e culturale⁴.

Non era però l'aspetto più negativo che va ricercato, invece, nella rinuncia a costruire un nuovo asse formativo per una scuola unitaria di base fondata sulla conoscenza storica e scientifica, con uno spazio – come moltissimi studiosi chiedevano – per le scienze, la tecnologia e il lavoro.

Denutrizione scientifica e difficoltà a stabilire un rapporto organico fra scuola e mondo del lavoro sono costanti problematiche della scuola italiana.

Non si è trattato qui di riassumere i contenuti della ricerca ma di evidenziarne alcuni aspetti centrali.

In conclusione, non si può trascurare la centralità attribuita agli anni '60 e '70, quando l'Italia viveva un momento, così come altri paesi europei, di grande rinnovamento civile, politico e culturale. Nel breve volgere di due decenni, la scuola subisce un profondo cambiamento, nasce – come si è detto – la scuola media unica e viene aperta l'iscrizione all'università a tutte le facoltà a partire da qualsiasi diploma della scuola secondaria superiore, che tuttavia tardò ad essere essa stessa riformata.

La società italiana tutta è in quegli anni in movimento: viene varata la legge sul divorzio; si mette fine alla segregazione manicomiale; le lotte operaie,

⁴ *Ibid.*, p. 159.

che raggiunsero il culmine fra il 1969 e il 1973, portano alla conquista dello statuto dei lavoratori; le contestazioni studentesche contro una scuola classista e autoritaria impongono il problema all'attenzione di tutti e al centro della vita sociale così come i movimenti femministi scuotono gli apparati simbolici di mentalità patriarcali, arcaiche e autoritarie.

Il merito del volume di Susi sta proprio nell'approfondimento costante del rapporto fra scuola e società che assume, nelle conclusioni, toni assai preoccupati che non alludono tuttavia alla deriva di una pericolosa paralisi delle idee e delle azioni.

Nella realtà attuale, si profila come prioritario il superamento del dispotismo del mercato, che sembra essersi sostituito al dispotismo del capitalismo, e, dunque, il superamento di quella che è stata da alcuni definita la «pietrificazione del presente», un'ideologia pervasiva che vorrebbe rendere impossibile cambiare la società e immaginare il futuro: «L'eclisse della coscienza storica si legge nel testo- produce soggetti che non sono più padroni del loro tempo» (p. 205)⁵.

Il volume di Susi, che si sofferma a lungo sulle conquiste democratiche che hanno consentito una espansione del sistema formativo negli anni Sessanta e Settanta, ci aiuta a capire che ogni conquista non è mai per sempre ma che richiede costantemente studio, vigilanza, progettualità e attiva partecipazione alla vita sociale e politica.

⁵ *Ibid.*, p. 205.

Protagonisti e strategie della lotta contro l'ignoranza nell'Italia unita. A proposito di una recente pubblicazione

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Actors and strategies in the fight against illiteracy in unified Italy. About a recent publication

ABSTRACT: The book by Giorgio Chiosso *Alfabeti d'Italia. La lotta contro l'ignoranza nell'Italia unita* ('Alphabets of Italy. The fight against illiteracy in United Italy', 2001), which was published coinciding with celebrations for the 150th anniversary of the Unification, has refocused the attention of the historians of education on the actual role which was played by the school system in the hard process of nationalization of the Italian people. Moreover, a new perspective is opened, not only on the struggle – which was carried out since 1861 – against one of the then fiercest enemies of the new nation, i.e. illiteracy; but also on the variety of the actions undertaken in order to «make the Italian people» by inculcating 'other' and 'plural' *alphabet(s)* – of spiritual nature and ethic, as well as cultural in a larger meaning.

EET/TEE KEYWORDS: Nationalization; Illiteracy; Education System; Educational Policy; Cultural Policy; Italy; XIX-XX Centuries (Book Review).

Nel novero della produzione editoriale uscita nel 2011 in concomitanza con i festeggiamenti per il 150° anniversario dell'Unità d'Italia non sono stati molti i volumi che hanno fatto diretto riferimento al ruolo ricoperto dal sistema scolastico nel tortuoso percorso di nazionalizzazione degli italiani. Costituisce una felice eccezione, tra gli altri, il volume di Giorgio Chiosso, pur non rispondendo a intenti di ordine squisitamente celebrativo, ma anzi sollevando questioni e interrogativi sull'effettivo ruolo ricoperto dallo Stato in tal senso, a fronte di una sostanziale presenza di esponenti della cosiddetta società civile.

Il titolo del libro – *Alfabeti d'Italia. La lotta contro l'ignoranza nell'Italia unita* – consente di inquadrare i saggi che lo compongono in quella specifica

storiografia che intende indagare modalità, protagonisti ed esiti della battaglia ingaggiata fin dal 1861 contro uno dei nemici allora più agguerriti della neonata nazione: l'analfabetismo. L'autore ne segue gli andamenti fino alla fine del secolo quando, se non si poteva ancora dire debellato, molto era stato fatto nella direzione sia di un deciso innalzamento della percentuale di italiani alfabetizzati, sia di una differente percezione sociale del fenomeno, stigmatizzato e non più 'tollerato' in virtù della sua notevole diffusione.

L'uso del plurale nel titolo rivela però la volontà di non limitarsi all'alfabeto nell'accezione tradizionale, legata all'insieme di segni grafici di un sistema di scrittura e, in senso lato, a quel complesso di nozioni elementari che possono essere definiti le basi, i fondamenti del sapere. Senza dubbio queste furono le priorità espresse nei primi provvedimenti normativi, ed in particolare nei programmi firmati dal ministro Terenzio Mamiani nel 1860. Leggere e scrivere, ovvero apprendere i rudimenti di quella lingua italiana ancora scarsamente padroneggiata da gran parte della popolazione, divenne quasi l'espressione più alta dell'unificazione politica della nazione. Lingua italiana, dunque, non solo in virtù del valore simbolico rappresentato dall'unificazione culturale ancora *in fieri* (severamente bandito il dialetto dalle aule scolastiche, almeno nelle intenzioni del legislatore), ma anche per cercare di debellare, come anticipato, quel male endemico destinato a fare storia negli annali statistici, vale a dire l'altissimo tasso di analfabetismo.

Le classi allora dirigenti furono tuttavia animate anche da una seconda, ma non secondaria, urgenza, vale a dire formare i cittadini a un comune *ethos*, a quell'insieme di valori spirituali che aveva ispirato i moti risorgimentali. Si trattava, insomma, di «fare gli italiani», per parafrasare la celebre sentenza di Massimo d'Azeglio destinata a passare ai libri di storia. Quel sentire collettivo che accomuna il popolo e lo trasforma in nazione, secondo gli epigoni romantici, si era rivelato infatti fragile, inconsistente e comune solo ad una sparuta élite intellettuale: lingua, sistema metrico, leggi, valuta, usanze, costumi, tutto differiva non solo tra nord e sud, ma spesso all'interno della stessa 'regione'.

Gli alfabeti altri cui si fa riferimento nel titolo del volume sono dunque quelli 'spirituali', di ordine etico e culturale. Fino a che punto, si interroga Chiosso riprendendo i dilemmi già al tempo formulati, «le masse dovevano essere 'istruite' e in nome di quali valori potevano essere 'educate'? Valori soltanto laici o anche religiosi?»¹.

In relazione a questo secondo quesito, verrebbe facile rispondere riprendendo i programmi per l'insegnamento della religione nella scuola elementare stilati nel 1860, nei quali questa disciplina assunse un rilievo significativo. Essa risultò accostabile a una sorta di educazione civica²: lontano dalle dispute teologiche,

¹ G. Chiosso, *Alfabeti d'Italia. La lotta contro l'ignoranza nell'Italia unita*, Torino, SEI, 2011, p. 4.

² «In quei Comuni ove l'istruzione finisce colla seconda classe elementare, il maestro dovendo mostrare i doveri che ha l'uomo verso la famiglia e la società, ne toglierà l'occasione soprattutto

questo insegnamento, oltre alle parti dedicate alla storia sacra ed al catechismo, avrebbe dovuto veicolare massime morali ed aforismi di particolare efficacia, ispirando «il sentimento del dovere e l'amore del bene nella tenera infanzia»³. Una concezione perfettamente coerente con quell'orientamento che intendeva il patrimonio valoriale cattolico come l'architrave di un *ethos* nazionale, come fondamento etico collettivo del nascente stato unitario. Tradotto in chiave pedagogica, si trattava dell'utilizzo della religione sul piano dell'etica sociale, attraverso il costante riferimento al sistema di valori della tradizione cristiana, preso però in termini a-storici e come tale tradotto in senso comune⁴.

Una visione, questa, destinata a venir meno negli ultimi decenni del secolo, in particolare con i ministri Coppino e Baccelli, propugnatori di una scuola laica – ovvero senza insegnamento religioso – nutrita di soli valori etico-civili. Tuttavia, nonostante la sostituzione, con la Legge Coppino del 1877, dell'insegnamento religioso con le prime nozioni dei doveri dell'uomo e del cittadino, profondo continuò a essere il riferimento a quel bacino valoriale cattolico di cui s'è fatto cenno. Solo negli ultimi due decenni del secolo è possibile rinvenire qualche apertura alle esigenze di un'etica moderna, maggiormente consona alla dimensione (pre)industriale in cui stava evolvendo il Paese, come, ad esempio, i riferimenti all'etica *self-helpistica*, intesa come autopromozione sociale mediante il lavoro. Una concezione individualistica che riscosse una discreta fortuna anche nei libri per la scuola nell'ultimo Ottocento, pur a fronte dell'evidente matrice protestante.

Nonostante le reciproche prese di distanza tra la classe dirigente liberale e la Chiesa, che ebbero proprio in ambito scolastico un terreno di scontro e di vivaci polemiche, sembra pertanto di cogliere un significativo punto d'incontro in ambito etico. O, per meglio dire, il tentativo di utilizzare alcuni aspetti della tradizione etica cristiana in chiave conservatrice, nell'ottica di mantenimento dell'ordine sociale.

Per cercare di dare un responso ad un questione così intricata e ad altri quesiti inerenti la lotta all'ignoranza nel secondo Ottocento Giorgio Chiosso, attraverso sei capitoli, quasi dei saggi a sé stanti, analizza le diverse strategie predisposte da esponenti dello Stato, della società civile, del mondo religioso: «dal potenziamento della scolarizzazione delle nuove generazioni alla organizzazione di iniziative d'istruzione per gli adulti, dalla divulgazione agraria e tecnologica

dall'istruzione religiosa, e da quei capitoli dei libri di lettura che si riferiscono a soggetti morali, al fine d'esporre ai fanciulli i doveri che li legano a Dio, ai loro genitori, ai fratelli, alla patria». Programmi annessi al R.D. 15 settembre 1860, n. 4315, *Regolamento per l'istruzione elementare*, riprodotti in M. Civra, *I programmi per la scuola elementare dall'Unità d'Italia al 2000*, Torino, Marco Valerio, 2002, p. 160.

³ *Ibid.*, p. 158.

⁴ Densè di spunti risultano le riflessioni di Francesco Traniello ora raccolte nel volume *Religione cattolica e Stato nazionale. Dal Risorgimento al secondo dopoguerra*, Bologna, il Mulino, 2007, in particolare il capitolo intitolato *Mondo cattolico e cultura popolare nell'Italia unita* (pp. 193-219).

alla produzione di giornali popolari e di letture amene semplici e accattivanti, spesso a sfondo sociale nella quale i ceti subalterni potevano immediatamente rispecchiarsi»⁵.

Fondamentale fu poi l'apporto di vecchi e nuovi protagonisti in ambito educativo. In prima linea non agirono solo quelle professioni strettamente gravitanti nell'orbita scolastica quali maestri – e maestre, che proprio nella seconda metà dell'Ottocento consumarono il sorpasso, in termini quantitativi, sui colleghi maschi –, precettori privati, ispettori, pedagogisti. Queste figure furono infatti affiancate – o sostituite, come nel caso dei precettori gradualmente rimpiazzati dai maestri privati – da altre preziose presenze in ambito educativo, a partire dal divulgatore agrario per finire al medico, insostituibile mediatore tra la scienza e la cultura popolare e missionario laico del verbo igienista.

I decenni che intercorsero tra l'Unità e il nuovo secolo videro, oltre alla comparsa di nuovi protagonisti sulla scena educativa, anche la definitiva affermazione della professione magistrale, una categoria socialmente riconosciuta e dotata di una specifica fisionomia, anche sul piano della riflessione pedagogica. Confrontata con gli incerti e poco rassicuranti esordi, lo *status* del maestro e della maestra a fine secolo appare nettamente migliorato, sia sotto l'aspetto della formazione che su quelli delle tutele e delle provvidenze, del riconoscimento sociale e degli strumenti a disposizione per l'aggiornamento e il sussidio nella pratica quotidiana, come le conferenze pedagogiche e le riviste magistrali e didattiche. La graduale evoluzione della condizione magistrale fu funzionale al delicato ruolo affidato dalle classi dirigenti liberali, quello di costituire il veicolo principale di trasmissione di uno specifico sistema di valori nazionali a una massa popolare che appariva molto distante da quella rigenerazione etica degli italiani da più parti invocata. Il maestro incarnava il modello ideale di cittadino: probo, onesto, leale, solerte, promotore di una nuova morale civile fatta di fede nella patria e di vivo senso del dovere.

Consistente fu anche la pattuglia dei religiosi, sia nei termini delle suore maestre e degli ordini femminili dediti alla formazione delle insegnanti (Figlie di Maria Ausiliatrice, Canossiane, Luigine, Marcelline, Dimesse, etc.), sia in quelli dei sacerdoti maestri ed educatori del popolo. Una presenza, soprattutto nelle scuole comunali e statali, destinata tuttavia ad assottigliarsi notevolmente: se all'indomani dell'Unità, infatti, su 34 mila maestri in servizio, uno su tre era un ecclesiastico, quarant'anni più tardi il loro numero si ridusse drasticamente a favore di una maggiore presenza nel 'sociale' del sacerdote.

Particolare attenzione all'interno del volume viene riservata alla congregazione salesiana, capace di organizzare un modello che, «pur essendo nato con connotati che in parte lo contrapponevano ai fermenti politico-culturali del tempo, si è sviluppato trovando fin dall'inizio un proprio stretto rapporto con

⁵ Chiosso, *Alfabeti d'Italia*, cit., p. 18.

la società civile»⁶. A livello di offerta scolastica i Salesiani seppero inserirsi negli interstizi lasciati liberi dallo Stato, avviando istituti di formazione professionale o gestendo ginnasi-licei in località periferiche. L'atteggiamento adottato non fu dunque di contrapposizione intransigente alle pretese del neonato stato italiano in fatto di educazione, il quale si era attribuito l'onere e la responsabilità di edificare un'etica pubblica attraverso l'insostituibile funzione ricoperta dalla scuola. La congregazione di don Bosco optò, invece, per l'adozione di un ruolo per certi versi vicario, supplente rispetto all'incapacità, o alla mancata volontà statale, di gestire l'intero sistema scolastico nazionale.

Scelta obbligata, considerati gli ammanchi nelle casse statali, di comodo o strategica, la delega statale a privati e istituti religiosi in materia di istruzione scolastica, quantomeno rispetto a specifici settori (si pensi agli asili), rimanda anche a quello scontro, tutto dialettico, tra i sostenitori di uno 'Stato educatore' e i fautori di uno 'Stato regolatore'.

A partire dall'ultimo scorcio dell'Ottocento a queste istanze, com'è noto, se ne aggiunse un'ulteriore, legata a doppio filo ai progetti nazionalistici allora avviati.

Con lo spostamento dall'interno all'esterno degli interessi nazionali la scuola, a sua volta, avrebbe dovuto riorientare le sue finalità: non solo combattere l'ignoranza per elevare le plebi, ma aumentarne la forza ed educarne il senso del sacrificio per prepararle allo scontro con un nemico esterno⁷.

Valori come l'obbedienza e il rispetto, già ampiamente presenti nella scuola italiana, furono corroborati dagli appelli alla coesione, allo spirito di sacrificio, alla disciplina, in particolare quella militare, vista come esemplare anche nel contesto di vita sociale. Assieme al sentimento patriottico si diffusero infatti anche gli apprezzamenti allo stile di vita militare, valorizzato come un modello di disciplina e di virilità. «I soldati erano additati come cittadini esemplari, consapevoli dei loro doveri, forgiati dai disagi e dalle fatiche»⁸, disposti ad immolarsi per la difesa della patria e per la sua estensione coloniale.

Le ricadute, a livello scolastico, dell'ideale dell'educazione nazionale furono svariate: dall'introduzione della ginnastica educativa, debitrice agli ambienti militari di esercizi e coreografie, al massiccio ricorso, anche nei libri di lettura, agli ideali patriottici e paramilitari. Le stesse materie di studio subirono un profondo rinnovamento. Si pensi, ad esempio, alla storia, passata da una concezione etica a una politica, e alla geografia, entrambe ritenute discipline basilari nel percorso di formazione di una solida coscienza nazionale. Gli stessi testi scolastici a partire dalla fine del secolo intensificarono il riferimento, nei brani di lettura proposti, ai miti del risorgimento, eroi ed episodi la cui enfasi

⁶ F. Motto (ed.), *Salesiani di Don Bosco in Italia. 150 anni di educazione*, Roma, LAS, 2011, p. 7.

⁷ Chiosso, *Alfabeti d'Italia*, cit., p. 101.

⁸ *Ibid.*, p. 107.

patriottica è comprensibile se inserita in quelle retoriche identitarie che furono alla base della formazione dell'immaginario collettivo nazionale. Narrazioni anche oggi tipiche di ogni processo di *Nation building*⁹.

L'educazione dell'Italiano, inteso come cittadino, passò dunque anche attraverso la diffusione di una ragguardevole messe di manuali scolastici e in particolare nelle pagine dei libri di lettura. L'autore non solo ne ripercorre la graduale affermazione nella scuola italiana – l'uso obbligatorio del libro di testo in classe fu anch'essa una conquista lenta¹⁰ –, ma delinea anche la geografia editoriale delle principali case editrici. Nonostante il quadro si sia mantenuto estremamente frammentato fino ai primi decenni del Novecento, già nel corso del secolo precedente alcuni marchi riuscirono ad imporsi a livello nazionale, ponendo le basi di quell'egemonia 'tosco-lombardo-piemontese' destinata a spartirsi per lunghi decenni il mercato editoriale scolastico ed educativo.

I manuali scolastici si rivelano dunque fondamentali non solo per gli studi di storia dell'editoria, ma anche per la storia della cultura, in quanto fonti preziose per cogliere il mutamento delle sensibilità collettive e gli orientamenti di autori ed editori, e per la storia della didattica, un ambito di ricerca ancora scarsamente indagato¹¹. Costante fu infatti il richiamo nei testi di scuola alla formazione del buon cittadino obbediente, timorato di dio e delle istituzioni, una formazione da attuarsi mediante una pervasiva funzione morale che avrebbe dovuto permeare ogni insegnamento. Di qui, il carattere marcatamente precettistico che venne ad assumere ogni sussidio e materiale indirizzato al fanciullo, a cominciare dalle letture e dai brevi brani proposti come traccia per le composizioni. Racconti, fiabe, novelle e le numerose lettere riprodotte in epistolari e testi di lettura rimandano infatti ai processi di formazione dell'identità nazionale nel quadro della costruzione dello stato moderno.

In conclusione, molteplici furono i canali e i protagonisti che, pur tra limiti e difficoltà di ogni genere, agirono per garantire la diffusione degli 'alfabeti', la cui conquista, come giustamente affermato dall'autore, rappresentò un fenomeno davvero epocale. Il merito di questo volume è dunque quello di indagare le vie intraprese per favorire l'accesso alla conoscenza dall'Unità alla fine del secolo, cercando contestualmente di rispondere ai molti quesiti tuttora aperti sui risultati di tali interventi e sui rispettivi ruoli ricoperti dai differenti interpreti.

⁹ Si veda, ad esempio, G. Procacci, *Carte d'identità. Revisionismi, nazionalismi e fondamentalismi nei manuali di storia*, Roma, Carocci, 2005.

¹⁰ Emblematico in tal senso il caso dei "cartolari" siciliani. Cfr. R. Sani, *L'editoria scolastica nell'Italia meridionale dell'Ottocento*, in Id., *Sub specie educationis. Studi e ricerche su istruzione, istituzioni scolastiche e processi culturali e formativi nell'Italia contemporanea*, Macerata, eum, 2011, pp. 53-106, cfr. in particolare p. 65.

¹¹ Costituisce una recente eccezione il volume curato da Palo Bianchini *Le origini delle materie. Discipline, programmi e manuali scolastici in Italia*, Torino, SEI, 2010.

Due protagonisti dello sviluppo della scuola primaria romena della prima metà del ventesimo secolo. Il contributo di una recente monografia

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Two outstanding figures in the development of primary schools in Romania in the first half of the twentieth century. The contribution of a recent publication

ABSTRACT: From the beginning of the twentieth century, rural primary schools in Romania have been put under an intense period of renovation under the signs of Spiru Haret reforms, the Minister of Public Instruction, who founded the modern Romanian education. The foundations of the haretian ideal were: promoting free and compulsory primary education, developing education and equal opportunities in urban and rural technical-professional education, linking theory with practice, encouraging learning trips, cultivating respect for people and defending the values of the traditions. Maria Bancea-Ilioiaia and Christina Zarifopol-Illias's monograph *Two outstanding figures of Romanian education. Neculai and Elisa Bancea teachers at "Ion Creanga" School from Humulesti, Targu Neamt in the first half of the twentieth century* (Bucharest, Anima, 2011) presents the image of two teachers in the native village of Ion Creanga (Romanian narrator of waist Brothers Grimm) who dedicated their lives to fulfilling the haretian ideal.

EET/TEE KEYWORDS: Primary Education; Rural School; Educational Reform; Teacher's Role; School-Community Development; Romania; XIX-XX Centuries (Book Review).

1. *Contesto storico e socio-culturale dell'inizio del ventesimo secolo*

All'inizio del ventesimo secolo, la Romania di oggi era divisa in Regato (che era composto dalle provincie, unitesi nel 1859, Moldavia e Muntenia) e

Transilvania, che fece parte dell'Impero Austro-Ungherese fino al 1 Dicembre 1918, momento conosciuto nella storia come la Grande Unificazione.

Spiru Haret, oggi considerato un vero e proprio pilastro dell'insegnamento romeno, nella veste di Ministro dell'Istruzione Pubblica – ruolo che ricoprì nei mandati tra 1897-1899, 1901-1904 e 1907-1910 – si fece promotore di una serie di leggi che diedero un nuovo volto alla scuola romena, integrandola nella società capitalista della Romania moderna. Dobbiamo sottolineare che nei primi anni del ventesimo secolo la Romania si trovava solo all'inizio del capitalismo, perché la lunga dominazione turca nelle province romene (Moldavia e Muntenia) non aveva permesso che avesse luogo quello sviluppo tanto atteso dall'intellettualità romena formatasi nelle scuole superiori e nelle università straniere, da Parigi, Berlin, Viena e altre città dell'Europa Occidentale.

Per tale motivo la figura di Spiru Haret è considerata decisiva per l'intero insegnamento romeno, giacché le leggi da lui istituite – la *Legge sull'istruzione secondaria e superiore* da 1898, la *Legge sull'istruzione professionale*, da 1899 e la *Legge sull'istruzione primaria e normale-primaria* da 1904 – hanno lasciato tracce profonde che influiscono ancora oggi sugli sviluppi della riforma dell'insegnamento romeno. «Il sistema scolastico di un paese – diceva Spiru Haret – dev'essere lo specchio fedele dei bisogni e del carattere nazionale del popolo che lo abita»¹. Il ruolo della scuola è di istruire le masse, assicurare lo sviluppo socio-economico del popolo, aprire nuove possibilità per coloro che si occupano a vario titolo dell'insegnamento. Gli insegnanti, infatti, sono stati profondamente coinvolti nel processo di sviluppo culturale della popolazione urbana e rurale.

Spiru Haret è stato il ministro dell'istruzione che ha proposto l'insegnamento obbligatorio e gratuito nella scuola primaria, l'istruzione e le pari opportunità in ambito urbano e rurale e una formazione adeguata del personale didattico; oltre a ciò, egli ha raccomandato di sviluppare il turismo didattico come mezzo per far conoscere ai Romeni la propria patria, i suoi valori culturali, il folclore, le tradizioni popolari, al punto da affermare nel 1905: «La scuola primaria dev'essere una vera scuola nazionale o non sarà nulla»².

¹ Cfr. M. Bancea-Ilioiaia, Ch. Zarifopol-Illias, *Două figuri de seamă ale învățământului românesc. Neculai și Elisa Bancea, institutori ai Școlii "Ion Creangă" din Humulești, Târgu-Neamț în prima jumătate a secolului XX* [Due rappresentanti della scuola romena. Neculai e Elisa Bancea istitutori nella Scuola "Ion Creangă" da Humulești, Târgu-Neamț, nella prima metà del XX secolo], București, Editura Anima, 2011, p. 7 (traduzione nostra).

² *Ibid.*, p. 9 (traduzione nostra).

2. *Seguire i principi di Spiru Haret: un modello di vita*

Nel 2011 è stata pubblicata, per i tipi dell'Editura Anima di Bucarest, una monografia dedicata a due rappresentanti della scuola primaria che hanno seguito e messo in pratica l'ideale haretiano. Le due autrici del volume, Maria Bancea-Ilioiaia e Christina Zarifopol-Illias affermano che

portare nella memoria collettiva immagini rappresentative di quegli insegnanti che hanno accolto la proposta di Spiru Haret e hanno dedicato la propria vita e attività a realizzare la sua visione, costituisce non solo un atto di giustizia reso ai loro meriti, ma anche una necessità perché tali figure esemplari costituiscono modelli di emulazione per coloro che si dedicano oggi al nobile mestiere di insegnante. In questo libro presenteremo due di questi modelli per l'insegnamento, Neculai e Elisa Bancea da Humulești, Târgu-Neamț, che rappresentano, tramite il loro operato, l'ideale haretiano³.

Il libro ha una struttura circolare che, dall'introduzione fino alla conclusione ci fa conoscere un mondo interessante, un mondo nel quale due destini si unirono per portare avanti l'ideale educativo promosso da Spiru Haret. I sei capitoli del libro hanno titoli significativi: *Neculai e Elisa Bancea: un profilo biografico*; *La storia della scuola di Humulești*; *Luoghi, tradizioni, abitudini*; *Al servizio della comunità*; *L'educazione religiosa e patriottica*; *Iniziativa culturali-educative*.

Neculai Bancea (1880-1964), figlio unico di una famiglia amorevole, crebbe circondato dagli ideali di dignità della persona, sensibilità per i poveri, fede in Dio e devozione verso la chiesa che erano propri del suo villaggio natale. A 20 anni fu nominato insegnante titolare alla Scuola Primaria Mista No. 2 da Humulești, dove lavorò per quarant'anni. Di certo rimase colpito dall'ispirato discorso del Ministro dell'Istruzione Pubblica Spiru Haret, pronunciato per la promozione nel 1899 della scuola normale (tra cui si trovava anche Neculai Bancea), nel quale egli incoraggiava i futuri insegnanti:

Andrete come insegnanti nei villaggi e nelle città del paese, illuminate con la vostra luce. Siate esempio in tutto! Abbiate le più belle case, giardini, stalle e animali, per dare un esempio agli abitanti e per seguirvi. E quando sarete in un'età più avanzata, potrete esser fieri di ciò che avete realizzato. Potrete dire allora: ecco, qui sono anch'io. Vi auguro successo!⁴

Elisa Butescu Bancea (1889-1985) era l'ultima di cinque figli della numerosa famiglia del prete del Monastero di Agapia. Nominata a 19 anni istituttrice presso la Scuola Primaria Mista No. 2 di Humulești – di cui sarebbe poi diventata la direttrice della scuola primaria delle ragazze – qui conobbe Neculai

³ *Ibid.*, p. 11.

⁴ *Ibid.*, p. 15.

Bancea che sposò nel 1909 e con il quale ebbe sette figli (sei bambini, oltre a un figlio che Neculai aveva avuto da un precedente matrimonio)⁵.

Perché sono tanto importanti questi due istitutori? Da una parte, perché operarono nello stesso villaggio di Ion Creangă, il più famoso scrittore romeno autore di fiabe per bambini e uno dei primi autori di didattica della lingua e letteratura romena, fondatore del metodo fonetico analitico-sintetico che ancora oggi viene utilizzato nella scuola romena per insegnare ai bambini a leggere e scrivere. Dall'altra parte perché – avendo dedicato la propria intera vita a promuovere la cultura e le tradizioni popolari – fu per i due maestri motivo d'orgoglio che il loro nome si collegasse con quello di Ion Creangă.

Il secondo capitolo della monografia è dedicato alla storia della scuola di Humulești, presso la quale lo stesso scrittore Ion Creangă si era formato: una scuola che in passato aveva conosciuto anche periodi di chiusura per la mancanza di personale insegnante. Nel momento in cui Neculai Bancea comincia la propria carriera tutto cambia: sotto la guida dei due coniugi Neculai e Elisa Bancea la scuola vive una fase di sviluppo e viene persino costruito un nuovo edificio, ottimo per le attività didattiche – anche se a spese e con il sacrificio materiale della famiglia Bancea.

Il terzo capitolo – *Luoghi, tradizioni, abitudini* – ci propone un'incursione nella storia della provincia, presentandoci luoghi leggendari e ricchi di storia (come *Cetatea Neamțului* – la Fortezza di Neamț). Neculai e Elisa Bancea si occuparono attivamente, infatti, della conservazione delle tradizioni popolari attraverso la raccolta di proverbi, massime, espressioni della saggezza e dell'esperienza di vita dei paesani moldavi, che costituivano il riflesso delle regole di comportamento degli abitanti di Humulești: «Le parole buone s'imparano a memoria, i buoni esempi ti spingono ad agire», «All'uomo buono basta una parola perché ne capisca dieci, all'uomo cattivo si dicono dieci parole e non ne capisce nessuna», «Chi ha fretta perde»⁶. I festeggiamenti per il Natale e il Nuovo Anno costituivano momenti di gioia ed eventi importanti per la comunità locale e anche in queste occasioni i due insegnanti erano presenti: ciò diede loro modo di conservare veri e propri tesori nazionali trascrivendo la propria testimonianza nei manoscritti di famiglia. Quella a cui appartenevano era una comunità fiera del luogo in cui viveva, e che per questo aveva inserito nei testi poetici e nei cantici la bellezza del paesaggio moldavo, la bellezza fisica e spirituale della gente. Molte pagine del libro sono consacrate, infatti, alla descrizione delle tradizioni popolari, una restituzione della carica etnografica e folclorica della Moldavia basata sull'uso dei documenti d'epoca, manoscritti della famiglia.

⁵ I dati biografici sono stati forniti dai membri della famiglia Bancea e Butescu.

⁶ Bancea-Ilioiaia, Zarifopol-Illias, *Două figuri de seamă ale învățământului românesc*, cit., p. 72.

Il vivo interesse dei due istitutori per i luoghi in cui abitavano e lavoravano si concretizzò nel desiderio di conoscerne meglio la storia e le tradizioni, spingendoli a studiare con attenzione l'aspetto del villaggio, il modo di vivere e di essere degli abitanti, le tradizioni millenarie che erano ancora conservate in quel tempo. Al fine di divulgare e far conoscere queste belle tradizioni ed evitare che venissero dimenticate dagli abitanti di Humulești, i dati raccolti da Neculai e Elisa Bancea durante le ricerche etnografiche da loro realizzate nel corso di tanti anni furono raccolte e conservate in forma scritta, affinché costituissero una testimonianza viva e utile per le future generazioni⁷.

Il capitolo *Al servizio della comunità* comincia con un'ampia presentazione del contesto storico, geografico e socio-

politico che permette di chiarire la portata del contributo che i due istitutori diedero allo sviluppo culturale e sociale della zona. All'inizio della sua attività didattica, il giovane istitutore Neculai Bancea annotò nei suoi quaderni quali erano i principi dell'insegnamento romeno, una vera e propria 'carta dell'educatore':

La scuola dev'essere un'istituzione basata su ordine, disciplina e comportamento civile, dal momento che riguarda i giovani studiosi e i docenti.

La scuola e la chiesa sono i pilastri che sostengono la vita, la morale, gli interessi e le aspirazioni della gente.

La scuola promuove la libertà spirituale, il lavoro, l'umanità e la democrazia, per integrare la nazione nella comunità dei paesi europei.

L'educatore accuratamente formato può sviluppare le capacità intellettuali e morali degli scolari, stimolando le energie creative latenti, per la conoscenza e la ricerca nel campo della scienza, della cultura, dell'arte e della storia.

L'insegnante deve migliorare continuamente la propria capacità di comunicazione, tenendosi aggiornato con le nuove informazioni sulla cultura e la società e lottando per aumentare il prestigio delle scuole primarie rurali e dell'insegnamento romeno.

L'insegnante è campione nella diffusione delle creazioni delle grandi personalità culturali del paese e della zona nella quale operano.

È un fatto conosciuto che la scuola rappresenta l'insegnante e l'insegnante rappresenta la scuola⁸.



⁷ *Ibid.*, p. 91.

⁸ *Ibid.*, pp. 98-99.

Sono principi forti, che sono sopravvissuti durante gli anni e mostrano quale fosse l'apertura della cultura e dell'educazione romena all'inizio del ventesimo secolo per un insegnamento moderno, che si ricollegasse ai principi europei.

Nella visione di Spiru Haret, l'attività dell'istitutore non si limitava all'attività didattica svolta nella classe, ma si manifestava nelle attività extrascolastiche come i circoli culturali, le riunioni rurali (nelle quali si raccontavano storie, si cantava e si ballava nel rispetto delle tradizioni locali), le biblioteche popolari e le feste popolari. In questo modo, gli insegnanti diventavano le guide spirituali della campagna: attraverso queste attività, avrebbero potuto contribuire allo sviluppo materiale delle aree rurali, sviluppando ampie azioni di diffusione delle conoscenze che riguardano l'agricoltura, la zootecnia e la pratica di vari altri mestieri⁹.

Neculai Bancea ottenne per la scuola da lui coordinata due ettari di terreno agricolo, posto a disposizione degli alunni e delle loro famiglie affinché potessero imparare da uno specialista bulgaro nuove tecniche per la coltivazione delle piante. Nel 1902 assieme a un gruppo di paesani Neculai Bancea ricostruì la vecchia chiesa di Humulești (che aveva più di 250 anni); quindi, nel 1909, fondò la Banca popolare "Ion Creangă" – rimasta in funzione fino al 1946 – per finanziare l'acquisto da parte dei paesani poveri di sementi e utensili agricoli necessari per lavorare la terra, e offrire agli scolari meritevoli contributi finanziari che permettessero loro di continuare gli studi presso le scuole di ordine più elevato. Purtroppo queste azioni, intraprese per il benessere della comunità, ebbero un triste esito per la famiglia Bancea che, dopo la chiusura della banca nel 1946, fu obbligata a pagare i debiti rimasti inevasi.

Il profondo spirito civico di Neculai Bancea si manifestò non solo nell'attività educativa ma in tutte le sue proposte: fondò la prima panetteria del villaggio, in cui si faceva pane con le patate; istituì una società delle paesane che, aiutate dalla moglie Elisa Bancea, preparavano oggetti lavorati artigianalmente da vendere al mercato, secondo modelli tipici della zona. Nel suo ruolo di sindaco della città Târgu-Neamț (di cui Humulești è oggi un quartiere) Bancea fondò librerie e farmacie, cooperative per il mutuo aiuto dei paesani, organizzò un orfanotrofio per i bambini dei soldati morti nella prima guerra mondiale, fondò nel 1915 il giornale locale «Plăieșul», coordinò la progettazione della ferrovia tra Târgu-Neamț e Pașcani arrivando a comprare con i propri denari le traversine; purtroppo però questo progetto non venne mai realizzato per la caduta del governo che lo sosteneva.

Le due autrici mettono in evidenza l'ottimismo di Neculai Bancea che lo motivò sempre a continuare le sue azioni umanitarie per il benessere della comunità. Neculai e Elisa Bancea furono noti, infatti, per loro altruismo: aiutarono in momenti difficili una famiglia di insegnanti con quattro bambini, rifugiati dal sud del paese durante la prima guerra mondiale; in varie occasioni

⁹ *Ibid.*, p. 99.

fornirono alimenti anche ad altri poveri e piccoli commercianti; sostennero i giovani di Humulești e dei villaggi vicini affinché continuassero gli studi presso scuole a indirizzo tecnico-pratico:

Neculai e Elisa Bancea hanno aiutato molti giovani a crearsi una famiglia e sostenerla, essendo convinti che tramite il loro supporto, queste si sarebbero sviluppate e avrebbero reso forte nella comunità una clima di rispetto, di tolleranza e di aiuto reciproco¹⁰.

Durante il regime comunista, nella notte del 15 agosto 1953, la casa della famiglia Bancea fu sottoposta a perquisizione da parte di un attivista del Partito Comunista Romeno assieme a due poliziotti: in quell'occasione furono portati via i libri dalla biblioteca, confiscata gran parte dei quaderni manoscritti e lo stesso Neculai Bancea prelevato per essere incarcerato «in grajdurile regimentului de infanterie din Bacău»¹¹ per alcuni mesi, senza nessun processo. Questo evento traumatico ebbe pesanti conseguenze sulla salute di Neculai Bancea, che morì nel gennaio del 1964. Sua moglie Elisa continuò a portare avanti la missione che avevano intrapreso insieme all'inizio del ventesimo secolo.

Nel capitolo dedicato all'*Educazione religiosa e patriottica*, le autrici illustrano quanto fondamentale fu il ruolo che la religione ortodossa ebbe nel fornire a Bancea l'equilibrio necessario per portare avanti gli ideali di Spiru Haret. *Nihil sine Deo* era, infatti, la massima che ispirò sempre la condotta di Neculai Bancea. Amico del giovane artista Nicolae Grigorescu (poi divenuto molto noto) che restaurò gli affreschi del Monastero Agapia, Bancea sostenne le attività religiose della comunità rurale di Humulești e insegnò sempre ai propri alunni a onorare le feste religiose e le feste nazionali, rispettando gli eroi, la regalità e la bandiera:

Per coltivare e mantenere i sentimenti patriottici nell'anima della gioventù di Humulești, Neculai Bancea organizzò feste che ricordavano eventi da La Grande Unificazione del 1918. In tali occasioni, parlava ai partecipanti del significato e dell'importanza di quegli eventi storici, mentre i docenti preparavano degli incontri nel corso dei quali si presentavano lavori che avevano come soggetto La Grande Unificazione o la storia delle provincie che formavano la Grande Romania, si recitavano poesie e si intonavano canti patriottici¹².

Neculai Bancea aveva a cuore che i momenti significativi della storia fossero ben conosciuti alla popolazione rurale, giacché:

era profondamente convinto che solo una buona conoscenza della storia, da quella della regione fino a quella del paese, assieme al rispetto e al riconoscimento per le maggiori personalità e per gli eroi locali o del popolo romeno, possono fissare le basi di una fondamentale educazione patriottica dei giovani e dei membri della comunità¹³.

¹⁰ *Ibid.*, p. 116.

¹¹ *Ibid.*, p. 104.

¹² *Ibid.*, p. 129.

¹³ *Ibid.*, p. 133.

Il sesto capitolo, *Iniziativa culturali-educative*, ripercorre le azioni intraprese di Neculai e Elisa Bancea per promuovere la cultura, l'educazione e l'immagine della figura più rappresentativa della comunità rurale di Humulești, lo scrittore Ion Creangă (1837-1889).

Secondo le due autrici l'espressione, universalmente nota, di Austen Layard «L'uomo giusto al posto giusto»¹⁴ è magistralmente incarnata dal caso dei due insegnanti Neculai e Elisa Bancea, che si rivelarono capaci di rispondere a pieno alla missione sociale affidata ai docenti, specialmente agli istitutori, dal Ministro della Istruzione Pubblica, Spiru Haret.

Da queste pagine emerge l'immagine dell'autore ben conosciuto dai bambini, Ion Creangă, la cui casa natale fu trasformata in un memoriale dalla famiglia Bancea, specialmente ad opera di Elisa Bancea la quale ebbe l'iniziativa di stimolare una grande raccolta di donazioni di testimonianze popolari allo scopo di esporle nel museo: una ricca collezione di fotografie dimostra la riuscita di quell'iniziativa. Nel 1907 Mihail Sadoveanu, uno scrittore romeno di chiara fama, prese parte alla cerimonia di scopertura di una targa di marmo intitolata al "Il Museo Ion Creangă", nel corso della quale lesse – con la sua voce inconfondibile e con il suo talento di narratore – brani dal romanzo di Creangă *Amintiri din copilărie (Ricordi d'infanzia)*. Parlando della personalità del celebre scrittore così si rivolgeva ai giovani Neculai Bancea:

Non dimentichiamo mai che siamo uomini veri, mantenitori delle tradizioni, dell'umanità, della bontà e dell'onore! Conosciamo la vita e l'opera del nostro grande scrittore Ion Creangă, per imparare a valutarne i meriti e perché sia per noi un esempio!¹⁵

L'elenco delle attività intraprese dai due coniugi per valorizzare l'immagine del villaggio natale dello scrittore Ion Creangă mette in primo piano il lavoro che entrambi assiduamente portarono avanti per promuovere la cultura romena nei momenti decisivi della sua storia, al contempo adempiendo al ruolo di «illuminatori del villaggio», come Spiru Haret chiamava gli insegnanti¹⁶. Le conclusioni delle autrici chiudono il cerchio di quello che loro stesse definiscono «un viaggio nel tempo»¹⁷, confermando in sintesi che Neculai e Elisa Bancea furono «il prodotto di due istituzioni essenziali nella vita di una società: la famiglia e la scuola»¹⁸:

Il destino volle che due giovani insegnanti si incontrassero e unissero le proprie forze, in primo luogo nella professione e quindi anche come famiglia, nel Humulești di Ion Creangă

¹⁴ Espressione utilizzata dall'uomo di stato britannico Austen Layard nella riunione della Camera dei Comuni del 15 gennaio 1855 («Omul potrivit in locul potrivit», citato in Bancea-Ilioia, Zarifopol-Illias, *Două figuri de seamă ale învățământului românesc*, cit., p. 134).

¹⁵ *Ibid.*, p. 143.

¹⁶ *Ibid.*, p. 166.

¹⁷ *Ibid.*, p. 168.

¹⁸ *Ibid.*, p. 168.

dove, attraverso il proprio operato, promossero e diffusero la conoscenza dell'opera del grande scrittore, istituendo un vero e proprio culto di rispetto della sua memoria. Animati dall'amore per i propri luoghi natali, che avevano appreso da bambini, e consapevoli dell'importanza di mantenere le tradizioni e le abitudini della regione, i due istitutori le osservarono e annotarono durante gli anni con il desiderio di salvarle dall'oblio e trasmetterle alle generazioni future. Buon parte di quelle loro osservazioni si trovano nelle pagine di questo libro. Nel complesso, la vita e l'attività dei due istitutori da Humulești, Târgu-Neamț si incentrarono sullo spirito del bene comune e del progresso nelle sue diverse manifestazioni, sia in cattedra, sia nella comunità¹⁹.

Il libro di Maria Bancea-Ilioiaia e Christina Zarifopol-Illias riflette non solo la vita esemplare dei due insegnanti Neculai e Elisa Bancea, ma anche la vita di un'intera comunità, con i suoi dolori e le sue gioie, una comunità unita e capace di mantenere viva la memoria dello scrittore Ion Creangă.

¹⁹ *Ibid.*, p. 169.

Notices / Recensioni

Notices

Recensioni

Roberto Sani, Domenico Simeone (edd.), *Don Lorenzo Milani e la Scuola della Parola. Analisi storica e prospettive pedagogiche*, Macerata, eum, 2011, 306 pp.

L'œuvre éducative et pastorale de Lorenzo Milani (1923-1967) ne cesse de susciter débats et polémiques. La formation du prêtre se plia à une discipline spirituelle ascétique qu'il conçut comme un enracinement dans le peuple. Il admirait les prêtres ouvriers, mais il fut surtout influencé par une Eglise florentine fortement marquée par le soutien de Giorgio La Pira aux luttes ouvrières de l'après-guerre. L'idéal d'une nouvelle chrétienté inspiré de Maritain et de Gian Battista Montini animait une Démocratie chrétienne qui avait renoncé à l'indifférence initiale du catholicisme italien pour la démocratie politique; mais Lorenzo Milani se sentait proche du groupe progressiste de Giuseppe Dossetti et il considérait comme une grande défaite la victoire électorale de De Gasperi du 18

avril 1948 qui avait acquise avec le soutien des conservateurs. Dans la seconde moitié des années 1950, la ligne politique du Saint-Siège s'éloigna du dialogue noué par La Pira avec le communisme et le prêtre toscan se trouva quelque peu marginalisé¹. Il conseillait à ses élèves de l'école de Barbiana la lecture des «Lettres de prison» de Gramsci sans que ses écrits n'aient quelque trace de marxisme, l'Évangile restant leur principale source d'inspiration. Le Saint Office lui reprocha en 1958 un «esprit de classe de marque prolétarienne», mais l'image du prêtre restait chez lui strictement tridentine². Son orthodoxie rigoureuse le mettait à l'abri de toute accusa-

¹ G. Miccoli, *Pio XII e la guerra*, in M. Franzinelli, R. Bottoni, *Chiesa e guerra. Dalla «benedizione delle armi» al «Pacem in terris»*, Bologna, il Mulino, 2005, pp. 393-416.

² G. Miccoli, *Don Lorenzo Milani nella Chiesa del suo tempo*, in *Fra mito della cristianità e secolarizzazione. Studi sul rapporto*

tion d'hérésie³. Elle n'excluait pourtant pas une indépendance d'esprit à l'égard des milieux ecclésiastiques. Le colloque interdisciplinaire de Macerata (novembre 2007) aborde l'activité pastorale et éducative de Lorenzo Milani dans une approche historique qui prend en compte le caractère prophétique de son message social et religieux.

Dans ses *Esperienze pastorali* (1958), le prêtre toscan décrivait la crise de la paroisse en termes particulièrement vigoureux. En plein «miracle économique», les paysans quittaient les campagnes avec un sentiment de honte, attirés par les lumières de la ville qui leur réservaient de multiples humiliations. Lorenzo Milani voulait y remédier par l'instruction et la catéchèse sans se dissimuler les difficultés d'établir une communication avec des groupes sociaux en constante évolution. La culture religieuse des milieux populaires était pratiquement inexistante, le catéchisme s'avérant inefficace dans une société privée de sens civique et des moyens de communication nécessaires pour se comprendre. Lorenzo Milani émettait des réserves à l'égard d'une pastorale trop proche des modèles de socialisation du monde séculier. Il rompait avec les orientations générales du clergé de son époque en estimant que les activités récréatives des œuvres catholiques s'efforçaient d'affirmer la présence du Christ dans le monde en termes d'anticommunisme et il doutait des capacités des activités sportives à contribuer à l'édification d'une civilisation chrétienne. La «récréation» lui apparaissait comme une nécessité physiologique qui relevait exclusivement du monde laïque. Certaines activités récréatives étaient sans doute ins-

tructives, mais elles obéissaient avant tout à un critère de divertissement. Elles furent progressivement abandonnées au profit de l'école qui devint le pivot de l'action pastorale et éducative de Don Milani.

L'école était l'instrument privilégié de l'évangélisation du peuple. Il existait une forme sournoise d'analphabétisme qui empêchait les jeunes issus des milieux défavorisés de participer à la vie publique et l'école de Barbiana s'ouvrait à eux pour leur faire vivre une expérience solidaire fondée sur la justice. Elle prenait ses distances avec une tradition aulique en reliant ses enseignements aux problèmes de son temps, tout en offrant aux élèves les instruments nécessaires à l'acquisition des connaissances et à leur commentaire. Elle accueillait des adolescents venus de milieux très différents mais animés du respect de l'adversaire, et elle organisait des rencontres susceptibles d'ouvrir leur esprit à d'autres horizons. La discussion qui les accompagnait s'adaptait au niveau de l'auditoire, l'éducation linguistique étant une des priorités de l'enseignement de l'école de Barbiana. Elle devait s'affranchir de toute rhétorique pour conférer de la clarté à la pensée et de la logique à l'expression. Les quotidiens représentaient un outil pédagogique majeur, Don Milani s'efforçant d'utiliser un vocabulaire emprunté au langage courant pour initier les élèves au sens des mots et d'aborder les sujets traités dans une perspective d'instruction civique. Maîtriser la parole signifiait non seulement acquérir la possibilité de communiquer avec les autres mais aussi d'entamer un dialogue avec le Verbe. L'enseignant jouait un rôle essentiel dans la pédagogie de Lorenzo Milani qui reprochait aux défenseurs d'un libre développement de la personnalité un optimisme ingénu relevant d'une conception contemplative de l'éducation⁴.

Chiesa-società nell'età contemporanea, Casale Monferrato, Marietti, 1985, pp. 428-454.

³ L. Milani, *Il dovere di non obbedire*, Firenze, Cultura, 1965, p. 33.

⁴ L. Milani, *Lettera a una professoressa*,

On trouve peu de traces dans les écrits du prêtre toscan de la profonde communion d'esprit du maître et de l'élève préconisée par le pédagogue catholique Mario Casotti, auteur en 1930 de l'ouvrage plusieurs fois réédité *Maestro e scolaro. Saggio di filosofia dell'educazione*. Lorenzo Milani empruntait par contre des expressions comme celle du «maître prophète» au pacifiste non-violent Aldo Capitini et ses perspectives pédagogiques obéissaient à une même exigence d'une éducation anticipant sur le futur⁵. Les critères retenus pour la formation des enseignants ne convenaient guère au prêtre toscan qui se méfiait des techniques élaborées par la réflexion pédagogique. Il avait une très haute idée de la fonction enseignante et insistait sur la vocation. La réussite de l'œuvre d'éducation dépendait pour lui d'une tension spirituelle unissant le maître à ses élèves dans un même idéal de charité chrétienne. Lorenzo Milani s'insurgeait contre toute idée de sélection dans la scolarité obligatoire et il dénonçait l'injustice du système de notation comme instrument d'homologation sociale⁶. Il souhaitait une évaluation des processus de formation permettant de juger la capacité de l'élève à utiliser un savoir.

Les prises de position de Lorenzo Milani ont toujours suscité des controverses. Ses *Esperienze pastorali* contenaient une charge anti-bourgeoise qui évoquait les polémiques d'un Peguy ou d'un Léon Bloy passées au crible de certains milieux catholiques florentins de l'entre-deux-guerres et du personnalisme d'Emmanuel

Mounier⁷. Ce «chrétien de l'Évangile» proclamait que certains spectacles immoraux ne l'étaient pas davantage que la stupidité de bien d'autres pourtant jugés bons. L'ordre du jour du congrès des aumôniers militaires italiens à l'occasion du 36^e anniversaire des Accords du Latran (11 février 1965) dénonçait l'objection de conscience comme une insulte aux morts pour la patrie et une lâcheté étrangère au commandement chrétien de l'amour de son prochain. Lorenzo Milani ripostait en préférant l'opposition des opprimés à leurs oppresseurs à celle des nationaux aux étrangers. Il rappelait que les guerres du fascisme avaient combattu les systèmes démocratiques et socialistes qui étaient les plus nobles de l'humanité. L'un donnait la liberté et la dignité aux pauvres et l'autre l'égalité et la justice⁸. Certains de ses propos furent jugés excessifs et leur auteur taxé d'un caractère absolutiste⁹.

Les conceptions de Lorenzo Milani insistaient sur le caractère communautaire du processus d'éducation et elles présentaient quelques analogies avec la pédagogie de Célestin Freinet sur les aspects pratiques et atypiques de l'école. Elles présentaient d'incontestables faiblesses dans une didactique dépassée et elles ne réservaient qu'une place marginale à l'enseignement des sciences; mais le prêtre toscan ne cherchait pas à faire de Barbiana un modèle et il la concevait davantage comme une incitation à la création d'une école nouvelle.

Firenze, Libreria Editrice Fiorentina, 1967.

⁵ M. Di Giacomo, *Don Milani tra solitudine e Vangelo (1923-1967)*, Roma, Borla, 2002, pp. 19, 305.

⁶ E. Butturini, *La pace giusta. Testimoni e maestri tra '800 e '900*, Verona, Mazziana, 2007, pp. 213-217.

⁷ A. Acerbi, *Cultura popolare e Parola in don Lorenzo Milani*, in *Don Lorenzo Milani tra Chiesa, cultura e scuola*, Milano, Vita e Pensiero, 1983, p. 129.

⁸ L. Milani, *Lettera ai cappellani militari*, 22 febbraio 1965, in M. Gesualdi, *Lettere di Don Lorenzo Milani, priore di Barbiana*, Milano, Mondadori, 1970, pp. 237-244.

⁹ G. De Rosa, *Un profeta del nostro tempo? Don Lorenzo Milani dalle sue lettere*, «Civiltà cattolica», 21 novembre 1970, pp. 370-376.

Son espace de liberté le consolait de l'incompréhension dont il se sentait victime dans l'Eglise. Lorenzo Milani préconisait «l'objection de conscience» comme une prise de conscience d'une responsabilité dans l'exécution des ordres reçus et il rappelait que le principal reproche adressé aux condamnés de Nuremberg et de Jérusalem était d'avoir obéi¹⁰. L'école de Barbiana prétendait former des citoyens immunisés contre les perversions intellectuelles dont souffraient parfois les enfants de la bourgeoisie. Don Milani laissait ainsi percer sa conception de la vie, faite d'une recherche tenace de la vérité et d'une utilisation de la connaissance dans un dialogue avec Dieu¹¹. Il dénonçait les privilèges de classe qui subsistaient dans l'école italienne des années 1950. Son œuvre de pasteur et d'éducateur a eu un très large écho dans les milieux laïques et au sein de la Gauche politique italienne¹². Elle devint au cours des années 1960-1970 une référence pour la culture catholique, en particulier dans les cercles engagés dans les critiques politique et sociales qui accompagnèrent la réforme conciliaire dans la péninsule.

La finalité ultime de l'œuvre de Lorenzo Milani était de rendre à l'homme une dignité dont le manque de culture le privait. Le prêtre toscan croyait en la capacité d'une culture alternative des pauvres à construire une société meilleure. L'union de la culture et de la foi forgeait une conscience qui permettait à la personne d'émettre un jugement personnel. Don Milani restait fidèle à la conception chré-

tienne d'un idéal social dont les faiblesses ne pouvaient dépendre des insuffisances des réalisations humaines; mais il y trouvait les motifs d'une réforme radicale de la pratique pastorale¹³.

Michel Ostenc

Giorgio Chiosso, *Alfabeti d'Italia. La lotta contro l'ignoranza nell'Italia unita*, Torino, SEI, 2011, 319 pp.

Les études sur l'éducation en Italie au début de son unité se sont multipliées ces dernières années. Il appartenait à un spécialiste comme Giorgio Chiosso d'en faire la synthèse. L'analphabétisme touchait 75% des Italiens en 1860 et 50% de la population adulte en 1901. L'école publique laïque a été le principal moyen de lutte contre ce fléau, mais les ambitions de la loi Casati (1859) s'avèrent irréalisables et l'obligation scolaire de la loi Coppino (1877) se limita aux enfants âgés de 6 à 9 ans. L'auteur évoque les réticences des couches populaires à une alphabétisation imposée par un Etat libéral détesté parce que responsable de la conscription et d'une fiscalité bureaucratique. D'autres institutions comme les écoles du soir et les bibliothèques populaires contribuèrent à l'alphabétisation par des livres à caractère éducatif ou patriotique et dans le cadre de formations professionnelles. Il existait également une pré-alphabétisation dispensée par des maîtres laïques ou des ecclésiastiques sous forme de brefs récits répétés à haute voix ou de dialogues noués à des fins politiques ou religieuses. L'historiographie de l'éducation manque

¹⁰ L. Milani, *L'obbedienza non è più una virtù*, Firenze, Libreria Editrice Fiorentina, 1996.

¹¹ L. Pazzaglia, *Don Milani, uomo di scuola*, in *Don Lorenzo Milani tra Chiesa, cultura e scuola*, cit., pp. 169-191.

¹² L. Lombardo Radice, *Serietà degli studi, privilegio e merito. Dieci anni dopo la 'Lettera a una professoressa'*, «Riforma della Scuola», juin-juillet 1977, pp. 16-17.

¹³ D. Simeone, *Don Lorenzo Milani e la scuola popolare di S. Donato (1947-1954)*, «Ricerche pedagogiche», vol. 27, n. 105, octobre-décembre 1992, pp. 31-40.

d'études psycho-sociales capables d'évaluer la formidable mutation que représentait le passage de l'univers mental de l'analphabète à la pratique de l'écriture et de la lecture dans un monde rural où elle était totalement bannie. De même, une étude des effets de l'émigration sur le recul de l'analphabétisme au début du XX^e siècle s'imposerait, les autorités américaines exigeant un minimum d'alphabétisation pour accueillir les nouveaux arrivants.

L'auteur montre parfaitement combien la principale préoccupation de l'Etat libéral consistait à familiariser les Italiens avec l'idée de nation dans une école primaire au civisme laïcisé. L'idéologie positiviste dominante se mêlait à la foi patriotique et la thèse d'un Etat éducateur se répandait largement parmi les enseignants. Au début de l'unité, cette conception n'était pas partagée par le ministre Ruggero Bonghi qui considérait la religion comme un besoin primordial de l'homme et ne croyait pas aux vertus des exercices physiques et militaires comme fondement de l'éducation morale; mais à partir des années 1880 les conceptions hégéliennes de l'Etat et la morale laïque positiviste des ministres Coppino ou Baccelli l'emportaient. Le système d'éducation fut fortement centralisé autour d'un provéditeur provincial, lui-même placé sous l'autorité du préfet représentant de l'Etat. L'étatisation aboutit à la loi Daneo-Credaro (1911) qui privait les communes les plus pauvres de la gestion de leurs écoles. La culture classique s'inscrivait dans la continuité de l'éthique nationale : son enseignement dans les lycées était conçu comme un principe unitaire capable de surmonter les diversités locales et d'assurer le lien entre un passé illustre et l'éthique du nouvel Etat. Giorgio Chiosso attribue justement la faiblesse de l'instruction technique et scientifique à cette priorité du classicisme qui devint la base idéologique du modèle

libéral. L'influence de l'Allemagne bis-marckienne orienta l'éducation physique vers la formation d'un citoyen-soldat à partir des années 1880, Crispi réclamant un «baptême de sang» comme signe de la grandeur de l'Italie. La diffusion des théories évolutionnistes et leur extension à la politique et à l'économie favorisèrent un «darwinisme social» et à la fin du XIX^e siècle l'idée d'une supériorité de la civilisation européenne servit à légitimer l'impérialisme italien. L'enseignement primaire connaissait une discipline plus rigoureuse et les écoles à l'étranger étaient destinées à accroître l'influence italienne dans le monde. L'éducation des Italiens dépassait l'éthique volontariste antérieure pour atteindre des projets expansionnistes. Le mythe de la «Troisième Rome» rejoignait celui de la «Troisième Italie».

La profession magistrale s'affirmait à travers une vocation, une formation et une carrière. Les Ecoles normales s'imposaient comme un passage obligé vers la condition enseignante et les conférences pédagogiques conseillaient de nouvelles pratiques didactiques aux instituteurs; mais les établissements des régions déshéritées souffraient de l'absence d'un enseignement primaire supérieur et devaient recruter des élèves de faible niveau. La loi Orlando (1904) s'efforça d'y remédier en créant trois classes post-élémentaires supplémentaires, mais elles ne furent ouvertes que dans quelques régions seulement. L'auteur montre parfaitement le rôle de médiateur social des instituteurs qui s'efforçaient de convaincre les couches populaires d'où provenaient leurs élèves. Leur adhésion massive aux associations d'enseignants du début du XX^e siècle contribuait à renforcer un esprit de corps, mais il existait de grandes différences entre les maîtres des villes et ceux des zones rurales.

Les institutrices remplissaient avec abnégation leur mission de «mères éduca-

trices» et elles acceptaient les postes déshérités plus volontiers que leurs collègues masculins. Elles étaient souvent célibataires et vivaient très éloignées du monde culturel. Leur nombre passa de 18 000 à 44 500 entre 1960 et 1900, cette forte augmentation s'expliquant par la désaffection masculine pour une fonction peu attrayante. L'auteur aborde peu le sort des instituteurs des zones déshéritées, si mal rétribués qu'ils devaient exercer un second métier pour vivre, au détriment de leur assiduité en classe. En outre, les Ecoles normales féminines accueillaient parfois des élèves qui ne se destinaient pas à l'enseignement mais ne disposaient pas d'établissement public suffisamment proche pour poursuivre leur scolarité. Il en résultait un dévoiement de la vocation de formation magistrale des Ecoles normales. Les rapports des inspecteurs primaires permettent de mesurer le décalage existant entre l'idéal éducatif des textes officiels et la réalité de l'école. Les campagnes méridionales et les zones montagneuses souffraient d'un fort absentéisme ou d'une surpopulation scolaire, d'un matériel didactique inexistant et de bâtiments insalubres inadaptés à l'enseignement. Les établissements privés furent progressivement confinés dans ces zones oubliées par l'instruction publique. Les maîtres itinérants continuèrent à vivre en marge du système officiel d'enseignement en pratiquant des méthodes pédagogiques élémentaires. Ils suivaient les déplacements saisonniers de certaines populations rurales qui les rétribuaient en nature.

Le rôle des prêtres dans l'enseignement public ne cessait de se réduire. Ils représentaient le tiers des 34 000 instituteurs de 1860 et avaient presque disparu parmi les 50 000 maîtres du début du XX^e siècle. La laïcisation de l'école était incompatible avec la présence d'ecclésiastiques qui considéraient l'instruction chrétienne

comme un antidote à la superstition et à l'ignorance. L'enseignement confessionnel ne subsistait guère que dans les écoles congréganistes. Ce repli s'expliquait par une préférence des familles pour l'école laïque et par une crise des vocations religieuses; mais elle correspondait aussi à une évolution du rôle du prêtre dans la société. Le prédicateur expert dans l'art de la catéchèse faisait place à une nouvelle image plus proche des fidèles et fortement inspirée de la théologie du Christ Rédempteur et Sauveur. L'abandon de l'école publique par les prêtres ne signifiait donc pas un renoncement à l'éducation et à l'instruction. La vie des religieuses évoluait elle aussi d'un spiritualisme monastique et d'un idéal de perfection vers un engagement dans la vie sociale. L'obligation d'un diplôme scolaire pour enseigner modifia profondément la formation des religieuses enseignantes qui étaient présentes jusque dans les écoles du soir. Les congrégations les plus concernées par cette formation s'ouvrirent aux diverses tendances pédagogiques de leur époque.

Le médecin vit son rôle s'accroître comme intermédiaire entre les individus et les besoins de la société. Une nouvelle génération de «médecins des pauvres» fit son apparition. Imprégnée de scientisme positiviste, elle se posait en adversaire des curés dont le magistère croisait le sien. D'autres acteurs intervenaient dans les campagnes. Un enseignement d'agronomie fit son apparition dans les Ecoles normales au cours des années 1880 et l'enseignement primaire devint un centre naturel de formation des agriculteurs. La crise du monde rural était en partie liée aux ruptures provoquées par la modernité, notamment avec l'extension des modèles juridiques démocratiques à la propriété foncière et à la vie des campagnes. La terre ne pouvait être réduite à une marchandise sans altérer un ordre naturel

basé sur l'équilibre social. L'auteur évoque avec pertinence ce conflit crucial entre une mentalité ancestrale et les exigences d'une économie moderne. De leur côté, les curés entendaient diffuser une conception associative de la vie rurale, les coopératives permettant de cultiver le sens des responsabilités et de la solidarité dans une œuvre globale d'élévation morale.

Dès 1859, la loi Casati imposait aux livres scolaires le respect des programmes officiels d'enseignement et l'Etat libéral multipliait les efforts pour encadrer leur production et en réguler la diffusion. Turin et Florence furent les principaux centres d'une édition scolaire qui nouait des liens avec les associations magistrales et s'appuyait sur quelques auteurs recrutés parmi des enseignants renommés. Dans ces ouvrages, l'autorité de l'adulte prévalait nettement sur la liberté de l'enfant. La famille portait la responsabilité de l'éducation dans une communauté qui s'élargissait ensuite aux dimensions de la patrie. A partir des années 1880, les éditeurs milanais améliorèrent les livres scolaires en dépassant le spiritualisme qui les inspirait jusque là. Le livre scolaire prit la forme d'un manuel destiné à dispenser un savoir en fonction de critères pédagogiques précis. Il répondait aux exigences d'unification de populations de langues différentes et d'intégration des classes populaires dans la vie sociale. Au début du XX siècle, l'éditeur Sandron amorça un tournant éditorial en passant d'une culture positiviste et scientifique à l'idéalisme philosophique. La revue «Nuovi Doveri» de Giuseppe Lombardo-Radice diffusa dans l'enseignement secondaire un esprit critique à l'égard de la pédagogie officielle et de la sclérose de ses pratiques didactiques. Le nombre de manuels scolaires augmenta de 10% entre les années 1880 et 1923. Cette inflation avait les causes les plus diverses. Elle reflétait les conflits idéologiques et

politiques de l'Italie de l'époque, mais répondait plus encore à la multiplication des programmes officiels d'enseignement. Les grandes maisons d'édition en profitèrent pour renouveler leurs catalogues pendant que les plus modestes disparaissaient. L'identité propre de l'enfance ne s'imposera que très lentement.

L'alphabétisation fut un phénomène majeur de l'Italie de la fin du XIX siècle. Elle mobilisa les hommes les plus divers sur les plans idéologique, politique et religieux, tous convaincus de la nécessité de ne pas tolérer des citoyens analphabètes dans l'Italie unie; mais cette belle unanimité s'est heurtée à des réticences qui ne se limitaient pas aux seules craintes de déséquilibres sociaux. Elles venaient aussi du fossé qui existait entre l'idéal éducatif de l'Etat libéral et la réalité de la vie de l'école italienne.

Michel Ostenc

Claudio Giuliodori, Roberto Sani (edd.), *Scienza, Ragione, Fede. Il genio di Padre Matteo Ricci*, Macerata, eum, 2012, 436 pp. + 2 Dvd.

Ce volume contient les actes des colloques de Rome et de Macerata (mars 2010) dédiés au père jésuite Matteo Ricci à l'occasion du IV centenaire de sa mort. Les communications ont montré que le mouvement missionnaire des XVI et XVII siècles étaient imprégnés de l'esprit créateur de l'époque post-tridentine. Identité et confrontation furent les deux caractéristiques de la mentalité de «l'homme baroque» en Orient comme au Nouveau Monde. Le catholicisme européen en plein renouveau générait de nouvelles expériences dans de nouveaux horizons. Il s'agissait d'une religion de l'Incarnation parce que l'histoire du christianisme dans

sa version tridentine est Incarnation continuée.

La lente élaboration de la *ratio studiorum* des collèges européens s'inscrivait dans une perspective de retour à l'esprit du patrimoine scientifique et littéraire des humanités classiques. Les missionnaires ont cherché à reproduire en Chine ce modèle didactique où la philosophie aristotélicienne occupait une place essentielle. Ses études mathématiques des phénomènes servaient de propédeutique à la théologie au même titre que ses spéculations métaphysiques. Les pratiques herméneutiques appliquées à l'étude de la tradition païenne furent également utilisées pour les textes de tradition confucéenne afin de valoriser les éléments qui pouvaient servir à la diffusion du message chrétien. Héritiers de l'optimisme humaniste et de sa confiance dans la nature humaine, les Jésuites croyaient à une révélation primitive dont les peuples païens conservaient des éléments et ils apercevaient des similitudes entre les croyances chinoises et l'Ancien Testament. Le catholicisme chinois va superposer aux pratiques anciennes des rites chrétiens susceptibles d'ouvrir vers la spiritualité.

Matteo Ricci a introduit une existence spirituelle particulière dans l'obéissance à l'esprit du Christ et à l'expérience ecclésiale tirée de son ordre religieux. La force mystérieuse du Saint Esprit l'a aidé à réaliser l'unité de la vie spirituelle et de la mission d'évangélisation en lui inspirant une méthode missionnaire novatrice. En ce sens, il a également rempli un devoir théologique en prenant conscience de la nécessité d'adapter le message chrétien à la situation concrète de celui qui est disposé à l'entendre. Matteo Ricci acquit une connaissance de la Chine, de ses traditions et de ses religions à travers la culture confucéenne avec laquelle il était en étroit contact. Les limites de sa connaissance du

Taoïsme et du Bouddhisme furent également imputables aux informations disponibles dans la classe des lettrés confucianistes qui occupait une place éminente dans la société chinoise de l'époque. Chez Matteo Ricci, la supériorité intellectuelle et religieuse céda ainsi le pas à une admiration croissante pour la pensée philosophique et la religion naturelle de la Chine antique. Le missionnaire jésuite s'adressait à la classe dirigeante chinoise des mandarins qui formait l'élite du pays et l'ossature d'une bureaucratie à laquelle on accédait par des concours difficiles. Il correspondait avec elle dans une langue qui lui était familière et avec des arguments convaincants. Il entendait respecter les classiques du confucianisme et voulait proposer les fondements de la doctrine chrétienne à travers des anecdotes exemplaires empruntées à la littérature gréco-latine et aux thèses philosophiques européennes; mais sa culture humaniste lui permettait de réfuter certaines doctrines du confucianisme et de combattre les tendances diffuses de la Chine de son époque à un syncrétisme néo-Confucéen. Matteo Ricci a sorti beaucoup d'intellectuels chinois de l'isolement culturel dans lequel ils vivaient en leur donnant l'occasion de s'ouvrir à la pensée occidentale et d'y rencontrer l'Évangile. Il a présenté son message religieux sous une forme morale en utilisant une terminologie empruntée à une sagesse classique de marque stoïcienne qui s'alliait au confucianisme contre le Bouddhisme et le Taoïsme. Si des théories philosophiques et religieuses préexistantes dans la tradition chinoise n'avaient pas facilité l'acceptation des idées chrétiennes, les missionnaires jésuites auraient probablement rencontré de grandes difficultés dans la diffusion de leur message. La conjoncture historique de la fin de la période Ming, faite d'une grande anxiété et de soif intellectuelle, offrit des conditions idéales à la

réception des conceptions catholiques.

La grammaire riccienne de l'évangélisation des cultures et de la diffusion de la foi était en perpétuelle évolution, non seulement dans son argumentation théologique mais aussi dans ses analyses des expériences ecclésiales et missionnaires. L'évangéliste devait acquérir une connaissance critique du monde auquel il s'adressait et servir de médiateur entre des cultures différentes. Cette communication réclamait une attention particulière pour le langage et les symboles caractéristiques d'une identité. L'expérience du don constituait un élément décisif de cette démarche sur le plan anthropologique aussi bien que théologique. Elle permettait une interrogation mutuelle sur les origines de l'être et le sens du réel. L'exorcisme de la peur de la mort fut une des caractéristiques essentielles du catholicisme pratiqué dans la Chine de la fin de l'empire Ming. Les pratiques funéraires occupaient une place importante dans les rites, confirmant le caractère central du culte des ancêtres et du traitement spirituel des âmes défunes pour les chrétiens chinois. Jusque-là, les pratiques de préparation à la mort restaient une prérogative des membres les plus éclairés du clergé bouddhiste et de ses disciples qui ne leur accordaient qu'une valeur civile et politique; mais la pratique religieuse catholique, avec ses livres de prières à caractère populaire, son iconographie spécifique et ses associations de pénitents toucha un public chinois appartenant à des couches sociales et à des niveaux culturels très différents. Ils étaient tous désireux de transformer le moment de la mort en une promesse de vie éternelle. Les convertis avaient compris la morale des enseignements relatifs à la mort mais aussi les dimensions spirituelles offertes par l'Eglise. Les missionnaires jésuites distribuaient des croix aux convertis en leur demandant de ne pas les

exposer dans les moments de persécution anti-chrétienne pour garantir la continuité d'une présence; mais le nombre de martyrs chrétiens en Extrême-Orient au XVIII^e siècle montre la sincérité des conversions.

Michel Ostenc

*Scientific News
and Activities
of Research Centres*



Cronache scientifiche
e Attività
degli istituti di ricerca

The MUSLI «Museo della Scuola e del Libro per l'Infanzia» ('The School and the Children's Book Museum') of the Foundation Tancredi di Barolo in Turin. An institution at the forefront of the preservation and enhancement of educational and scholastic heritage*

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ABSTRACT: This presentation of the Italian «School and Children's Book Museum» in Turin (*Museo della Scuola e del Libro per l'Infanzia*, MUSLI) aims to shed light on the richness of the historical-educational collections gathered as well as on the complex activities on conservation, research and education that the Foundation Tancredi di Barolo has carried out in the field of history of school and of children's literature in Italy, over the last decade.

EET/TEE KEYWORDS: Museum; History of education; Children's Literature for Children and youth; Cultural Heritage; Museum Education; Italy; XIX-XX Century (Museum).

Introduction

The «Museo della Scuola e del Libro per l'infanzia» ('The School and Children's Book Museum'), known with the acronym MUSLI, can be considered

* For the realization of this paper, the author could rely on the statements of the Director of MUSLI, prof. Pompeo Vagliani of the 21st January 2013.

one of the most important museums regarding the history of school and of children's literature, not only on a national level, but also on a European one.

The rich and valuable collection contained in the MUSLI and in the Foundation Tancredi di Barolo involves items relating to the history of the school and the children's books from the Eighteenth century to the 1960s and consists of about 12,000 books, original illustrations, games, educational tools, recordings and pictures, posters, diplomas and magazines.

Therefore, it is soon evident how the documentary heritage preserved in the museum of Turin constitutes an essential instrument for the scholars and experts in historical and pedagogical studies¹ and for all those involved in the scholastic, educational and didactic history², in the history of children's literature and in the material history of the school³.

¹ For a more detailed discussion on the enhancement of the documentary heritage preserved in the museums of education see, in particular, F. Targhetta, *I musei dell'educazione come risorsa per la ricerca*, «History of Education & Children's Literature», vol. V, n. 1, 2010, pp. 421-431. The essay is an account of the XIII International Symposium of the museums of education held in Rouen from 1st to 4th July 2009 whose main focus was the pedagogical and didactic use of images. With respect to the issues discussed in this paper, the discussion emerged at the symposium regarding the use students can do of the documentary heritage preserved in the school museums is particularly interesting. We also point out the project FISQED, coordinated by a national observatory represented by the National Agency for the Development of School Autonomy (ex INDIRE) in Florence, which aims to achieve a cumulative national catalogue of historical collections of exercise books and didactic papers, <<http://www.fisqed.it/>> (last access: March 3rd, 2013).

² It is important to remember the existence of various types of museums related to the history of pedagogy, school and didactic whose name identifies a clear definition of the nature of the museum itself; scholastic museum, didactic museum, pedagogical museum, university museum, museum of school and museum of education, in fact, are often used in the lexicon as synonyms, but they refer to different ideas of museum. For further information see: J. Meda, *Musei della scuola e dell'educazione. Ipotesi progettuale per una sistematizzazione delle iniziative di raccolta, conservazione e valorizzazione dei beni culturali delle scuole*, «History of Education & Children's Literature», vol. V, n. 2, 2010, pp. 489-501. About the museums of the school and education, see also: L. Bellatalla (ed.), *La Scienza dell'educazione: il nodo della storia*, Milano, Franco Angeli, 2006; M.T. Sega (ed.), *La scuola fa la storia. Gli archivi scolastici per la ricerca e la didattica*, Portogruaro, Ediciclo Editore, 2002. On the topic of didactic museums see: A. Nuzzaci, *I musei pedagogici*, Roma, Kappa, 2002.

³ With «material history of the school» we refer, in particular, to the meaning given to this expression by Pierre Moeglin according to which it should be considered in relation to the history of the means of production and consumption of teacher's aids. It should take into account, in the first instance, the economic processes associated with the gradual development of mass schooling (see P. Moeglin, *Les industries éducatives*, Paris, Puf, 2010). The objects used in education, therefore, become «means of mass education» because they are submitted by the industrial company to processes of uniformity and formal codification that allow the large-scale distribution. Everything belonging to the world of school is subjected to this process of standardization: exercise books, books, diaries, writing instruments, teaching aids, pupils' equipment (school bags and uniforms), school furniture (blackboard, desks), teaching aids for the various disciplines (abacuses, maps, atlases, educational boards, etc.), become products of the school industry and new objects of consumption by the students/consumers. For further information see: J. Meda, «Mezzi di educazione di massa». *Nuove fonti e nuove prospettive di ricerca per una «storia materiale della scuola» tra XIX e XX secolo*, «History of Education & Children's Literature», vol. 6, n. 1, 2011, pp. 253-279; A. Escolano

In addition to them, however, the Museum is specifically addressed to the 'non-experts' in this subject, to the young people, to educators and to all those who, fascinated by the world of the school, just want to go into its halls for a few hours to discover its interesting exhibitions⁴.

As explained in the programmatic intents of the Foundation:

The purpose of the museum path is to put in contact the youth of today with the real and imaginary areas of primary school in the nineteenth and early twentieth centuries, to enhance the patrimony of exemplars, materials and experiences related to our region and to the prestigious pedagogical tradition of the city of Turin and to stimulate a critical reading of the current situation. A journey to recognize and appreciate the efforts of those who have believed and still believe in school and that are personally committed in the development of human beings through education⁵.

To better show the way in which the MUSLI carries out its educational project, it is useful to start from the definition of school museum provided by Juri Meda, according to which:

You can [...] distinguish two [...] types of 'school museums': on the one hand, the school museums that consider the objects kept in them as historical sources and in which, along with the exhibition area, there is a research centre in which you can see and study the collections, on the other hand, the school museums that consider the objects kept in them as mere evidences, which are set up in the exhibition space to be enjoyed only by visitors in search of memories and/or by students interested in seeing how the school was in the time of their grandparents⁶.

The MUSLI undermines this idea, representing a third type of school museum: the museum of Turin is, in fact, a place of 'exploration' of the history of scholastic world in which not only the experts and scholars have access to the collections of the research centres⁷, but where everyone (children, teachers, museum staff, bibliophiles, simple visitors) become the new 'researchers' thanks to the possibility to get in touch with many of the materials exposed and

Benito (ed.), *La cultura material de la escuela*, Berlanga de Duero, Ceince, 2007. In Spain there is the Centro Internacional de la Cultura Escolar (CEINCE) with the aim of investigating all the aspects of the school culture in a multidisciplinary manner: Id., *The International centre of school culture as a centre of memory and interpretation*, «History of Education & Children's Literature», vol. 3, n. 2, 2008, pp. 473-487.

⁴ The annual visitors of the MUSLI, according to a rough estimate, are around 10,000 a year; mostly students from Piedmont and Lombardy, but also from Liguria and France. This means that, after the Egyptian Museum and the Museum of Cinema in Turin, the MUSLI is the third most visited city museum.

⁵ Institutional website: <<http://www.fondazionetancredidibarolo.com>> (last access: March 5th, 2013).

⁶ Meda, *Musei della scuola e dell'educazione*, cit., p. 494.

⁷ The Foundation provides, in fact, support for theses, Ph.D., research and internships.

experiencing directly, through the use of multimedia workstations, the tactile perceptions derived from the use of the objects of the collection⁸.

This has certainly been made possible through the efforts of the Director of the Museum, Professor Pompeo Vagliani, who has kept intact the initial spirit with which, as a young student of pedagogy, took its first steps into the world of education and publications for children.

He started, in fact, with a personal commitment to the recovery of materials related to the subject of study of his degree thesis, but then the professor carried on over the years a long and patient work of retrieval and collection of materials related to the children's literature and to the scholastic and educational world. In this sense, he was certainly moved both by a great passion for these issues, but also by the curiosity aroused by questions and new research perspectives brought to light by each new discovery. Professor Vagliani, moved by the desire to discover (and to let discover) new horizons of study, has never identified himself with the classic figure of the 'collector' interested only in the conservation of a valuable patrimony, but he remained faithful to his early spirit of researcher and has always wanted that all the material he had collected was available to all those interested in it, to respond to needs for research, study, analysis or simple curiosity. With this aim, he has managed and directed for twenty years institutions and projects of various kinds⁹, whose main purpose was to allow everyone to enjoy his important collection.

⁸ It is important to remember here that the debate on the importance of school museums has involved several scholars from different countries and seems, nowadays, far from being concluded. In the XI symposium *Museums of School Life and Childhood and School History Collections* held from 21st to 24th July 2005, in Kartause Ittingen (Switzerland), the discussion focused, in particular, on three main questions that are still subject of debate and of different views: "What contribution can museums of school life and childhood make to current issues in education and schooling? How important are collection strategies? What type of network makes sense for museums of school life and childhood?" (D. Joos, M. Zahl, *11th and 12th International Symposium for Museums of School Life and Childhood and School History Collections*, «History of Education & Children's Literature», vol. 2, n. 1, 2007, p. 436).

⁹ In particular, Professor Vagliani was the director from 1986 to 1996 of the Foundation «Alberto Colonnetti - Centro studi della letteratura giovanile (Centre for the Study of Youth Literature)» in Turin organizing many exhibitions, including one on Guido Gozzano's Tales, one on the book *Cuore* held in the Mole Antonelliana and one dedicated to *Giuseppe Eugenio Chiorino* (known as GECH). When the experience with the Foundation Colonnetti ended, Vagliani created the association "Liber et Imago" by which, in line with its research interests, has organized many exhibitions with the theme of the history of children's literature (P. Vagliani, *Tra fate e Folletti. Il Liberty nell'editoria per l'infanzia*, Torino, Daniela Piazza Editore, 1995; Id., *Quando Alice incontrò Pinocchio, le traduzioni italiane dei libri di Alice*, Torino, Trauben Stampatori Editore, 1998). See also: P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, Laterza, 1995, p. 407.

The Foundation Tancredi di Barolo and the MUSLI

The long process of research and the public presentation of the significant material collected over the years by Professor Vagliani saw, finally, its most important recognition with the birth, in 2002, of the Foundation Tancredi di Barolo.

It was born thanks to the concession of the historic Palazzo Barolo by the Opera Barolo¹⁰, to accommodate the extraordinary collection of books and documents made available by the Vagliani family¹¹. This new body (whose founding members are the Opera itself and the Vagliani family) has soon started an intense and important collaborative project which has involved the University of Turin, the City and the Province of Turin, the Piedmont Region, the Company of San Paolo, the publisher SEI as well as private members interested in supporting the Foundation and completing its museum. The fundamental objectives laying at the basis of the establishment of the Foundation were to highlight the links between the territory of Turin and Piedmont and the production and widespread of children's books in the nineteenth and twentieth centuries, to put in contact the youth and the population with the educational practices used in schools in the late nineteenth century, to contribute to the formation of a social and critical conscience, aware of its historical roots, and to promote a new knowledge and development of books and school, also through the use of new multimedia.

A comprehensive and ambitious project, so, aimed to a wide audience: to the citizens of Turin and Piedmont and to the local and regional institutions to promote the enhancement of its historical and cultural roots in the area of training and education; to the pupils and teachers of all levels of school to stimulate a comparison with the educational practices of the past, through processes of identification and recognition of differences; to the experts in the museum sector, presenting itself as an example and a comparison for other museum experiences (not only in the scholastic area) in Italy and abroad¹²;

¹⁰ The Opera Barolo of Turin is a body established by the Marchioness Giulia Falletti di Barolo in order to become its testamentary executor, administering the goods of the Marquises Barolo to support charitable activities and the religious orders she founded with her husband. Currently, among its activities, it also deals with the management of what was the first elementary school in the Kingdom of Savoy, founded in 1837 by the Marquises Tancredi themselves: in this sense, the Opera ideally continues the intents of the Barolo family (see P. Vagliani (ed.), *Il Viaggio incantato. Guida al Museo della Scuola e del Libro per l'Infanzia di Palazzo Barolo*, Torino, CLS Arti Grafiche, 2011, p. 4).

¹¹ The material donated by Marilena and Pompeo Vagliani consisted, at the time of the establishment of the Foundation, of 8,500 works, games, illustrations, and teaching materials.

¹² On the important role the museum has for the representation of popular culture and the transmission of educational memory in the socio-cultural context in which it appears, see the interesting essay by C. Yanes, *The museum as a representation space of popular culture and educational memory*, «History of Education & Children's Literature», vol. 6, n. 2, 2011, pp. 19-31.

to the scholars and researchers from universities and research organizations interested in analysing Italian and European issues related to the history of the school, education, publishing houses or children's literature; merely to curious or nostalgic people, interested in discovering (or rediscovering) through a guided tour of the Museum the times gone by and the atmosphere of the old classrooms.

The priceless heritage preserved by the Foundation Tancredi di Barolo finds certainly its most striking representation in the exhibitions that can be visited daily in the MUSLI. What appears in front of the eyes of the visitors is, however, only a very small part, carefully selected¹³, of all the material preserved in the Foundation.

To wholly discover the variety of the documents collected over the years by Vagliani it is necessary to start from the halls of the Foundation that include the Library, the Archive and the Study Centre. It is from these halls that numerous research paths promoted and encouraged by the Foundation start (opened to academics, researchers, graduate students, undergraduates, and to all those who want to use the important stored materials for their research), and in which they tried to reconcile the needs of conservation¹⁴ with the equally important need for accessibility, enhancement and use of materials¹⁵.

The majority of the material is kept in the International Library: it includes about 12,000 volumes, school books, books of pleasant reading, reference books and periodicals with a time span ranging from 1678 to the 1960s. The bibliographic collection is further divided into thematic sections such as science and music, the great historical figures, publishers, authors of children's literature, the history of pedagogy and school, the history of literature and illustration.

The *books of pleasant reading* undoubtedly constitute the largest section of the collection with about 7,000 volumes, the majority still to be catalogued. This section contains novels, tales, short stories, children's book series, picture

¹³ According to a rough estimate carried out by prof. Vagliani only 1 per thousand of the possessed material found space in the museum exposition. A percentage quantitatively small compared to all the material stored in the Foundation, but whose careful selection has brought to show the more valuable pieces not only in economic terms, but also (and especially) in terms of stimulus for the new research perspectives.

¹⁴ The fundamental criterion about the conservation and cataloguing of the material followed by the Foundation is that of thematic homogeneity: each section, in fact, is made up of objects that have the same subject matter or the same intended use. Anything that was impossible to catalogue using this criterion has been added to specific funds that collect volumes according to the publishers.

¹⁵ The great amount of material to be catalogued, along with the lack of adequate financing, has so far meant that only a small part of the patrimony of the Foundation has been filed and recorded. At the time of writing there is a printed catalogue for the consultation of all the archival material stored in the Foundation (books, games, special funds, and school and teaching materials, albums, class registers, postcards, illustrations), but there is not a complete catalogue of all the library materials owned by the Library. At the moment, only the most ancient and the schoolbooks are catalogued (and available on SBN).

books, as well as many important magazines for youth¹⁶. Another section of about 4,000 volumes contains, instead, *schoolbooks* and thus contains books for pupils (such as spelling-books, textbooks, and primary school textbooks), books for teachers (manuals about pedagogy and didactic, and school and nursery school history), texts about handwriting and manuals for the teaching of physical education¹⁷. The *International Fund* (2,000 volumes) and the collection of *translated Italian books*, instead, underline that the children's book is a product with a strong international vocation: the collection includes both important European book productions¹⁸ and historical translations of the major Italian classics in various countries around the world¹⁹. The international fund on music divulgation, with an amount of 500 volumes, contains several songs books and musical fairy tales, as well as records and sheet music, with the purpose of teaching music in a funny and creative way²⁰. The field of divulgation also includes the materials dedicated to *scientific*²¹ (300 volumes), *religious*²² (350 volumes) and *artistic*²³ (350 volumes) diffusion: all these volumes have in

¹⁶ Among the periodicals, see in particular: «Il Corriere dei Piccoli», «Il Giornalino della Domenica», «Cordelia», «Il Giornale per i Bambini», «Cuor d'Oro», «La Domenica dei Fanciulli».

¹⁷ Among them, we recommend: *Metodo compendioso per insegnare a leggere* (Tipografia d'Yves Gravier, 1829); *Tesoretto per l'infanzia, ossia 1000 disegni delle principali cose a sapere col relativo vocabolo Italiano, Francese, Tedesco e Inglese* (Libreria di educazione e d'istruzione di Andrea Ubicini, 1840); *Il nuovo alfabeto italiano illustrato con disegni a colori* (Fratelli Treves Editori, 1886); *Atlante degli attrezzi di ginnastica elementare* (Lit. Fratelli Doyen, 1865).

¹⁸ For example: *Nos enfantes, scènes de la Ville et des Champs* (Librairie Hachette et Cie, 1887); *The story without an end* (Sampson Low, Son, and Marston, 1868); *Kinder und Haus-Märchen* (G. Reimer, 1825); *The road to Oz* (The Reilly & Britton Co., 1909); *The Story of Noah's Ark* (Archibald Constable & Co., 1905).

¹⁹ Among the most important: *Pinocchio's Adventures in Wonderland (Le avventure di Pinocchio)* (Marsh & Co. Publisher, 1898); *The Prince and his Ants (Ciondolino)* (Henry Holt & Co., 1910); *The Adventures of Chicchi (Storie vere di Zia Mariù)* (G.P. Putman's sons, 1927); *Le journal de Jean Bourrascot (Il giornalino di Gian Burrasca)* (Michel, 1928); *El corsario negro. Novela de aventuras (Il Corsaro Nero)* (Calleja, s.d.).

²⁰ Among them: *Solfège du jeune âge français et anglais* (Libro panorama, 1850); *A Trip to Music-Land. A Fairy Tale, forming an allegorical and pictorial exposition of the elements of music* (Houlston and Sons, 1876); *Canzoni popolari per i bambini* (Istituto Micrografico Italiano, 1912); *Cantilene Popolari dei Bimbi d'Italia* (Istituto Italiano d'Arti Grafiche, 1920); *Il giuoco della musica* (Angelo Signorelli Editore, 1936).

²¹ Among them: *Marmaduke Multiply's. Merry Method of Making Minor Mathematicians* (69 numbered lithographic tables, 1816); *Le ricreazioni scientifiche, ovvero l'insegnamento coi giuochi* (Fratelli Treves Editori, 1881); *L'Abbicci della fisica, ossia Primi rudimenti di questa scienza pei giovinetti studiosi* (Paravia, 1888); *La chimica dilettevole* (Antonio Vallardi Editore, 1926); *L'Aguzzingegni. Esercizi ricreativi per i ragazzi della quarta classe elementare* (Industrie Editoriali Siciliane, 1925).

²² As, for example: *Jesus Sirach* (1761); *Piccola Bibbia per fanciulli* (1839); *La storia delle crociate raccontate ai giovinetti* (Vallardi, s.d.); *Salmi di Davide* (Istituto Israelitico Colonna e Finzi, 1855); *A child's book of saints* (J.M. Dent & Co., 1888); *Il Padre Nostro* (Vita e Pensiero, 1936).

²³ We recommend: *Le petit Nab* (Librairie d'Art Baschet Editeur, 1882); *Children's coloured paper work* (Anton Schroll & co., 1927); *Lucciole, Grilli, Barbagianni...* (Alpes, 1921); *Storie di un micio bigio, di una gallina nera e di una marmottina prigioniera* (Bemporad, 1923); *Il sigaro di*

common the effort to combine the needs of education and training of the pupil with the natural and instinctive need for fun and entertainment typical of every child and seek, therefore, to present the topics in a simple, charming and funny way.

The collection is completed with the interesting collection on *animated books*²⁴ (350 volumes), containing the original editions of the most important artists of the animation world, and the *stories of dolls*²⁵ (250 volumes) whose undisputed protagonist is the toy-doll.

The rest of the patrimony owned by the Foundation, more heterogeneous in nature, is instead kept in the Archive which collects all the material commonly used in the classrooms of nineteenth and twentieth century: exercise-books, diaries, posters, school report cards, diplomas, essays, educational tools, educational games, illustrations, drawings²⁶, writing materials, maps, school furniture, Froebelian artefacts, teaching boards. It is a collection of considerable importance both for its quantity and for the richness and variety of the collected documents, and it constitutes the fundamental basis for the study of the material history of the school that use this kind of material as its research sources.

In addition to the management of the Library and of the Archive (with its research centre) the most important aspect of the Foundation is certainly the management of the School and the children's book Museum opened in Palazzo Barolo in 2003. The uniqueness of this museum at a national and European level is that it brings together in a single structure two sectorial fields usually distinct: on the one hand, the history of the school and of educational practices, on the other, the history of children's book.

This sectorial distinction is evident in the exhibition project realized by the MUSLI. The museum, in fact, is physically divided into two 'souls': a first exhibition route, which runs along the four floors of the building, guiding the visitors along a path on the history of the school, and a second space located in the historic cellars of the building and opened in 2008, containing an exhibition

fuoco. Poesie per i bambini (Bompiani, 1945); *Alphabet* (Emme edizioni, 1969).

²⁴ Among them: *The history of how Ned Nimble built his cottage* (Dean & Son, s.d.); *Nel Mondo dell'Allegria* (Antonio Vallardi Editore, 1890); *Bestie vive e burlone. Sei grandi quadri mobili e colorati con storielle gaie e ridevoli* (Ulrico Hoepli, 1908), *Im Zoologischen Garten: ein Bilderbuch zum Aufstellen* (J.F. Schreiber, 1890); *Il prestigiatore verde* (Mondadori, 1945).

²⁵ Among the books owned: *Le récréation de l'enfance ou joli recueil de gravures amusantes. Dédié aux petites demoiselles* (Librairie d'Éducation et de Jurisprudence, 1814); *Lieschens Puppenstube. Kleines illustriertes Haus und Wirtschaftsbuch für unsere Lieblinge* (Otto Spamer, 1884); *Autobiografia di una bambola* (Libreria di Educazione di Istruzione, 1891); *Storia d'una bambola* (Hoepli Editore Libraio della Real Casa, 1906).

²⁶ On the importance of drawing as an important historical source for the reconstruction of the collective imagination of a given period, see J. Meda, *Sgorbi e scarabocchi. Guida ragionata alle collezioni storiche di disegni infantili*, «History of Education & Children's Literature», vol. 2, n. 1, 2007, pp. 349-372 which also contains brief descriptions of the historical collections of children's drawings now collected all over the world.

on the history of children's book²⁷; all the elements are held together by the clear desire to tell a story of childhood that includes all its most important aspects.

In this narrative project, the MUSLI is certainly favoured by the very large amount of material stored at the Foundation: although, in fact, the physical limitation of spaces that does not allow displaying all the patrimony owned, the large number of available materials makes it possible to create numerous temporary exhibitions that, in their turn, permit treating many different aspects of the world of the school and of the children's book²⁸.

The guided tour of the School and the children's book Museum

The visit to the museum begins with the first part of the exhibition located in a wing of the old Palazzo Barolo which was destined, in the past, to the servants²⁹. In particular, we start from the *playground* where, in a small outdoor space, the typical games and the most common objects pupils used during the break between lessons are collected: seesaws, skittles, benches, the baskets for the meal. Everything contributes to put the visitor immediately in contact with the dimension of the elementary school of the nineteenth century and to better introduce the first floor of the museum. It draws its inspiration from the famous book *Cuore* by Edmondo De Amicis and aims, therefore, to recall the school year 1881/1882 as narrated by the writer. There are two reasons behind this choice. On the one hand, in fact, it wants to clearly emphasize the link between the important figure of the writer of Oneglia and the city of Turin to make the story fully understood, to underline the essential bond that has always linked the education with the children's book, and to highlight similarities and differences between the school described in books and stories and the real school³⁰. On

²⁷ In particular, the new museum route dedicated to the history of children's book was opened on 24th November 2011 to complete the route that had already been partially prepared for the Exhibition for the centenary of the SEI in 2008.

²⁸ At the time of writing the following temporary exhibitions are shown in the MUSLI, on the occasion of the celebrations for the tenth anniversary of the establishment of the Foundation: *Un mondo di fiabe. Duecento anni dalla prima edizione dei Kinder und Hausmärchen dei Fratelli Grimm* (1812-2012), *Fantasie di Natale e Caratteri per i delfini. Il mito amazzonico del delfino rosa evocato da Márcia Theóphilo nell'edizione originale Tallone Boto, il Delfino rosa* (2012).

²⁹ It is, in particular, a wing of the building, which dates back to the first phase of construction and that is adjacent to the *Povere Orfanelle* Institute. The wing includes a dormitory, a pantry and a laundry room: the settings, of low height, are characterized by original terracotta floors and decorated panelled ceilings.

³⁰ With particular reference to the events narrated by Edmondo De Amicis in *Cuore*, the MUSLI offers a comparative path between the school as imagined by the writer and the ones actually existing in the Turin area at the time of writing the famous book. In particular, in fact, the elementary school where the story takes place, the so called «Sezione Baretti», is actually

the other hand, the reference to De Amicis school inevitably put in evidence a typically bourgeois and northern model of school of the late nineteenth century. The children that animated the classrooms of Piedmont in the nineteenth century were educated in the city that was from 1861 to 1865 the capital of the newly formed Kingdom of Italy, and so they would have been important members of the future ruling class involved in the process of formation, before, and of administration, then, of the new kingdom of Italy (think to figures such as Massimo D'Azeglio and Giovanni Giolitti). The educational model shown in the MUSLI wants, therefore, to proudly underline the importance acquired by primary education in Turin in relation to the process of construction of a national identity and of formation of a unitary state as well as in relation to the national educational system.

When visitor arrives on the first floor, a *school closet* [Pic. 1] immediately appears before his eyes; through the display of the rewards and punishments reserved to students, it tries to recall the daily practices of school life: medals, certificates of merit, tickets for puppet shows and books (the latter often without illustrations and with thick body types) were reserved for the most deserving, while, inevitably, donkey ears, chickpeas and slapped hands were the punishment for the most unruly pupils.

A little further there is a room in which a typical classroom of the late nineteenth century is perfectly reproduced, called *L'aula dei tempi di Cuore* ('The classroom typical of *Cuore* period') [Pic. 2]: the attention is soon struck by the big four-seats school desks whose wooden surfaces are carved with the signs of students who have used them and that are equipped with supports for inkpots, flaps and seats. The collection also includes the teacher's desk, a blackboard produced by Paravia in the late nineteenth century, wooden or leather schoolbags, geometrical figures produced by Vallardi and even a small cast iron stove useful to warm up (but the students had to bring the wood from their home). On the walls there are educational posters on crafts and animals, maps and, as essential elements of each classroom, the kings' portraits next to a large crucifix³¹.

the School Moncenisio in via Cittadella n. 3 attended by the writer's children. In addition, in *Cuore* there are frequent references to other schools of the late nineteenth century (particularly to schools with a social and assistance purpose): for each of these institutions, the museum offers a multimedia program through which it is possible to acquire essential information about them and to see their images. A map of Turin in 1882, compared with the map of the city nowadays, also allows their localization and identification.

³¹ In 1879, the Regulation of municipal schools of Turin established that in each classroom the portrait of the current king together with that of Vittorio Emanuele III (as the founder of the Nation) and a crucifix had to be exposed. In addition to these objects, also posters on the metric decimal system, a map of Italy, geometric solid figures and the Calendar had to be posted up. In particular, the display of the rulers' portraits was linked to the specific need, felt by the liberal ruling class in the aftermath of the unification process, to «make Italians»; this work of «national education» saw, inevitably, the involvement of the younger ones considered as fruitful and unspoiled



Pic. 1. The *Armadio di scuola* of the school year 1881/1882.



Pic. 2. The classroom typical of *Cuore* period.

(All the photographs, reproduced hereafter, have been taken by the A. with the kind permission of the Foundation)



Pic. 3. The exhibition of games in *Scuola per ridere!*



Pic. 4. The children's bedroom. On the wall there is the «Gioco del Giornale delle Fanciulle».

“ground” on which build the solid basis of a strong national identity and a new spirit of citizenship. The school programs enacted after the Casati Law of 1959 attempted, therefore, to promote an education based on the love for the Nation and the development of a civil and political identity that the various Italian populations could share. In addition to the display of the kings' portraits, the elementary school of the 1960s was also characterized by a strong nationalization of the contents

After this more 'academic' section, the MUSLI then offers a more enjoyable and funny vision of the school through an accurate exhibition of games, drawings and animated books of the late nineteenth century. In this hall, called *Scuola per ridere!* ('School to laugh!') [Pic. 3], the most striking elements are fine schools in miniature, a rare *Ecole à musique* with a music box and board games with figures to cut out to reconstruct a classroom or to play at being a teacher.

The visit to this first floor is concluded with an exhibition dedicated specifically to the book *Cuore* (called *Cuore and De Amicis*) where it is possible to find, among other things, an edition autographed by De Amicis, a series of original tables³², important historical translations in several foreign languages³³ as well as items that belonged to the writer.

After visiting the exhibition on the first floor, there is the second floor, said noble floor. Here the path on the school's history is intertwined with the museum circuit about the Historical Apartments of Palazzo Barolo and the history of Carlo and Giulia Tancredi di Barolo³⁴. Between 1825 and 1830, in particular, the Marquises started, in the palace of Turin, the first experiences of shelters for the poor children of the city, modelled on the *Salles d'Asile* of Paris³⁵. Such

of the various school subjects (especially history and geography). For further information we recommend A. Ascenzi, *Metamorfosi della cittadinanza. Studi e ricerche su insegnamento della storia, educazione civile e identità nazionale in Italia tra Otto e Novecento*, Macerata, eum, 2009; Ead., *Tra educazione etico-civile e costruzione dell'identità nazionale. L'insegnamento della storia nelle scuole italiane dell'Ottocento*, Milano, Vita e Pensiero, 2004; M.C. Morandini, *Scuola e nazione. Maestri e istruzione popolare nella costruzione dello Stato unitario (1848-1861)*, Milano, Vita e Pensiero, 2003; G. Chiosso, *L'educazione nazionale da Giolitti al primo dopoguerra*, Brescia, La Scuola, 1983.

³² In particular, the original tables by Guido Bertello for the Mondadori edition of 1965 and Sandro Lobalzo's one for that of the SEI in 1992.

³³ In addition to the translations in English, French, German and Spanish there are also those in Czech, Dutch and Japanese.

³⁴ Numerous works were written on the work of the Barolo in favour of the destitute women and children of Turin in the early nineteenth century. We recommend: G. Chiosso, *Educare e istruire il popolo a Torino nel primo Ottocento*, in L. Pazzaglia (ed.), *Chiesa e prospettive educative in Italia tra Restaurazione e Unificazione*, Brescia, La Scuola, 1994, pp. 210-220; Id., *Il Marchese Tancredi Falletti di Barolo e l'educazione del popolo nel primo Ottocento subalpino*, in R. Finazzi Sartor, *Educazione e ricerca storica. Saggi in onore di Francesco De Vivo*, Padova, Alfassessanta, 1995, pp. 233-258; R.M. Borsarelli, *La marchesa Giulia di Barolo e le opere assistenziali in Piemonte nel Risorgimento*, Torino, G. Chiantore, 1933; D. Massè, *Un precursore nel campo pedagogico. Il marchese Barolo*, Alba, Tip. Commerciale, 1941; L. Ravasi, *Giulia Colbert marchesa di Barolo*, Roma, Fonte Vive, 1983.

³⁵ The *Salle d'Asile* in Paris established by Marchioness Pastoret was one of the first institutions that, in the early years of the nineteenth century, began to provide to the protection and education of the young children of the poorer classes, using private resources. The first «asylum room» was opened in Paris in 1828 and a few years later (in 1836) 24 asylums arose in the city thanks to the institution directed by the Marchioness. For further information we recommend: D. Deasey, *Education under six*, London, Taylor & Francis, 1978, pp. 17-31 and *Storia delle sale d'asilo*, «Guida dell'educatore», vol. 3, n. 27-28, marzo-aprile 1838, pp. 115-122.

shelters were organized by Carlo as nursery schools in 1829-30 in order to implement an educational program aimed at promoting the educational and social growth of the poorer classes starting from children education³⁶.

The MUSLI is connected to this enlightened teaching experience, not only in a physical sense but also in a metaphorical one, linking harmoniously its route with the figures of the Marquises Barolo and thus referring to the paradigms and to the history of the school in the nineteenth century, not only through the daily objects and practices, but also through the historical figures who have contributed to the birth and development of a more democratic education enlightened by religion. In this case, as in that of De Amicis, there is the strong desire to emphasize the link between the city of Turin and the history of children education. However, unlike the halls dedicated to the famous writer, the history of education represented on this floor is less bourgeois and the Marquises' and the other enlightened private citizen's projects were dedicated not the future ruling class, but to the people. About the reasons that led the Marquis Barolo to that choice, Giorgio Chiosso writes:

The education and the school attempted, on the one hand, to prevent the most serious social ills of the time (begging, vagrancy, pauperism, moral disorder, children abandonment) and, on the other, to ensure the diffusion of positive values in the individuals. The only repressive action was not enough to render the society stable and orderly. It was necessary to enter into the consciousnesses, create good habits, form good-oriented mentalities to prevent the renewal of the disorders of the Revolution³⁷.

After the exhibitions on Barolo and Silvio Pellico, climbing the ladder, you can reach the third floor exhibition in which there is the *children's bedroom* [Pic. 4]: in a charming and perfectly preserved setting (the original floor, the panelled ceiling, the small central fireplace) the moment of the children's return from school and the eternal conflict between the duty of study and the desire of leisure is represented. In addition, therefore, to the exhibition of pens, inkpots, exercise-books and school books that remind the obligation for children to do their homework, the display of games and entertainment also finds large space. We can also find games dedicated to the girls that recall the household duties typical of the good 'little woman of the house': sewing machines, pots and cookers, dolls. A curious «Gioco del Giornale delle Fanciulle» ('Game of the Journal of the Maidens') of 1884, also proposes a feminine version of the classic board game 'snakes and ladder', in which each box recalls the actions of a little girl during the day, with awards or punishments according to the

³⁶ See G. Chiosso, *Gli scritti educativi di Carlo Tancredi Falletti di Barolo*, «History of Education & Children's Literature», vol. 4, n. 2, 2009, p. 131 and Vagliani (ed.), *Il Viaggio incantato*, cit., pp. 18-20.

³⁷ Chiosso, *Gli scritti educativi di Carlo Tancredi Falletti di Barolo*, cit., p. 130.

behaviour (such, for example, stealing the jam, pulling the cat's tail, reading a book etc.). Toy soldiers, wooden horses, cubes and rackets are, instead, reserved for children.

After a valuable exhibition of engravings and lithographs printed in the late eighteenth century and in the mid-nineteenth century, representing scenes of school life, you can get into the hall called *La Lavandaia e la stiratora* ('The Washerwoman and the Laundry Worker') [Pic. 5] that uses as exhibitors the original sinks of the early twentieth century and that houses temporary exhibitions of great interest, whose common purpose is to narrate the history of the teaching of the various subjects through the display of scholastic materials and games. Among the most important materials the exhibition lets you to discover there are: a toy calculator, an arithmetic tombola, a diorama of the 20s and twelve explanatory panels on different materials (from textiles, to foods and metals), through which the students could better know everyday life objects and materials.

Finally, on the fourth and last floor of the museum there is the *Sala del Muto Insegnamento* ('Mutual Teaching Hall')³⁸: the Marquis Tancredi, inspired by Bell and Lancaster's system, was interested in the use of tools to facilitate popular primary education by introducing in his nursery school an alphabetic poster and the 'sand desk'. The latter, in particular, consisted of a wooden box filled with sand on which the children could draw with their finger the letters or syllables indicated by the teacher: certainly an economic, practical and fast method that allowed children to learn more easily the use of writing. In reference to the education of children³⁹, a second area of the floor is dedicated to the reconstruction of a *Sala d'asilo* ('nursery school room') [Pic. 6], which is directly related to Friedrich Fröbel's experience and to the Nursery Gardens⁴⁰

³⁸ The Mutual teaching (or reciprocal learning) was introduced at the beginning of the nineteenth century in some primary schools for poor people by the English educator and philanthropist Joseph Lancaster and by the Rev. Andrew Bell. Through this method the teaching was not given simultaneously by the teacher to all students, but was initially given only to a group of more able pupils who, then, would in turn acted as a 'repeaters' of the lessons, repeating what they have learned to the other students divided into teams or classes. This teaching methodology, easily applicable and inexpensive, acted as an important boost for the developing of public free education divided into classes. For more information: D. Bertoni Jovine, *Storia dell'educazione popolare in Italia*, Roma-Bari, Laterza, 1965, pp. 29-36; Pazzaglia (ed.), *Chiesa e prospettive educative in Italia tra Restaurazione e Unificazione*, cit.; A. Ascenzi, G. Fattori, *L'alfabeto e il catechismo. La diffusione delle scuole di mutuo insegnamento nello Stato Pontificio (1819-1830)*, Pisa, Istituti Editoriali e Poligrafici Internazionali, 2006.

³⁹ More generally, about the education of children in Italian nursery schools from Giolitti age onwards, see: R. Sani, *L'educazione dell'infanzia dall'età giolittiana alla carta Bottai*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla legge Casati al centro-sinistra*, Brescia, La Scuola, 2001, pp. 239-256; D. Bertoni Jovine, *Storia della didattica dalla legge Casati ad oggi*, Roma, Editori Riuniti, 1976, Vol. I, pp. 5-31.

⁴⁰ The fröbelian educational method supported the development of children energy, pivoting on the game and the activities connected with it. For further details about the methodology used see his writings: F. Fröbel, *I giardini d'infanzia*, Milano, Enrico Trevisini, 1888, and Id., *L'educazione*

and exposing small folding desks, furnishings, the six fröebelian ‘gifts’⁴¹ and many other games and items inspired not only to his educational method but also to Maria Montessori’s⁴² and Agazzi sisters’ ones⁴³.

The last hall of the exhibition displays the reconstruction of an *early twentieth century classroom* [Pic. 7]. Elegant dark walnut school desks and typical furniture of the early twentieth century serve as support for the educational workshops held there and aimed at the pupils of elementary schools, allowing them to sit down and actually re-elaborate the information collected during the visit to the Museum of the School. Among the furnishings stand out a large poster by Francesco Ravetti, the «Map of the History of Italy from the earliest times to 1913», which graphically summarizes the history of the Kingdom using the metaphor of interwoven roots, and the charcoal drawing by Ernesto Bianchetti, «Alla più buona» (‘To the better’) (1890) in which a poor girl proudly displays her medal.

Concluded this first tour, visitor returns to the Museum entrance, entering in a basement space which defines an additional and little-known link between the MUSLI and Palazzo Barolo: in 1869, in fact, the *Publishing Typography Eredi Botta*⁴⁴ was housed in the rooms of the ancient palace and here printed,

dell'uomo e altri scritti, Torino, Paravia, 1930.

⁴¹ Described in the book *L'educazione dell'uomo* (1826) the gifts described by Fröbel were six and insisted on the importance of roundness which refer to the idea of finite and infinite universality; the ball helped the child understanding the constitutive principles of creation such as elasticity, motion, inertia as well as stimulating activities, curiosity and attention.

⁴² According to Maria Montessori the child’s mind acquires knowledge through the direct contact with things and the use of the five senses. She organizes schools with furnishings suitable for children and in which the children were able to manipulate «materials for development» whose physical characteristics (surfaces, weight, scent etc.) acted as guide to the development of muscle coordination (the base of the learning process of writing). Great attention was also paid to the teaching of hygiene and of social life rules through special exercises-games (see: M. Montessori, *Il metodo della pedagogia scientifica applicato all'educazione infantile nelle case dei bambini*, Roma, Bretschneider, 1909).

⁴³ Rosa and Carolina Agazzi resumed the concept of school-family presupposed by Montessori’s scientific pedagogy, but they adapted it to the Italian economic situation by replacing the expensive materials scientifically structured by Montessori school with other teaching aids derived from the manipulation of materials readily available and commonly found in homes or in the children’s pockets (the so-called «museum of the junk without patent»), leaving to the child the freedom of imagining how to use them. About the educational method adopted by the two sisters see: R. Agazzi, *Guida per le educatrici dell'infanzia*, Brescia, La Scuola, 1932.

⁴⁴ The Publishing Typography Eredi Botta began his career in Turin in 1812 at the Palazzo Carignano. It was mainly active in the field of religious and devotional publications (among its publications we remember *the Rules* of the Sisters of Saint Anne). In the second half of the nineteenth century, it became the printing house of the Parliament, of several ministries, of the Municipality of Turin, of the Curia and of the Savings Bank, expanding, therefore, its editorial commitment to the literary, historical and educational field. In 1869, as a result of the increasing demand for space, the typography moved to Palazzo Barolo. The growth of publishing activities and the development of printing machineries led to an increase in the number of employees (reaching the number of sixty employees) and, in 1885, to the expansion of the leased spaces, thus occupying 49 rooms (including basements, mezzanines and large rooms). In 1903, because of the

in 1873, the first Italian translation of the short story *Storia di una madre* ('The Story of a Mother') by Hans Christian Andersen. This section underlines, therefore, the important link between the publisher and its production in the field of children's literature, but it also witnesses what were the instruments used in the late nineteenth century to create the book and other printing materials⁴⁵. Printing presses, hand presses, cutters and typographic drawers with characters are collected in the multimedia workstations of the exhibition, allowing to investigate various aspects of print production. A video projector, in particular, shows an interesting and a bit nostalgic video realized a few years ago where Mr. Giovanni Roberto demonstrated the functioning of an old printing press of the nineteenth century kept in his small printing workshop at Pont Canavese and still working perfectly (and now on display in the MUSLI).

Other multimedia workstations, instead, allow you to virtually touch the precious *animated books* displayed in the glass showcases permitting, through the touch of a computer screen, to move them, animate them and discover the mechanisms behind their functioning. This is, certainly, the expository space, which more highlights the strong blend between print and multimedia, which is the most innovative aspect of the children's book Museum.

Also the exhibition dedicated to the *Typography in the classroom* [Pic. 8] is very interesting: here, the techniques of the French educator Célestin Freinet⁴⁶ for the production of school papers in the classroom⁴⁷, seen as an important tool for the education and the involvement of pupils, are displayed.

reshaping of the area of Palazzo Barolo facing via Corte d'Appello, the typography moved to Via del Carmine progressively reducing its activities until its closure at the end of the 1920s. See also: Vagliani (ed.), *Il Viaggio incantato*, cit., pp. 70-71.

⁴⁵ The work of the Typography Botta, in the exhibition displayed at the MUSLI, ideally want to connect itself with the important role played by the Marquis Carlo Tancredi Falletti di Barolo in the field of educational publishing. In particular, the collection presents many essays written by the Marquis among which we remember *Sulla educazione della prima infanzia della classe indigente* (1832), *Lezioni sopra la Geografia Patria ad uso della gioventù piemontese* (1835-36), *Cenni diretti alla gioventù intorno ai fatti religiosi successi nella città di Torino dal principio dell'era cristiana ai nostri tempi* (1836), *Brevissimi cenni diretti alla gioventù che frequenta le Scuole italiane intorno ai vari stati che da essa possono eleggere ed alle disposizioni con cui si devono abbracciare* (1837). For further information about the Marquis's commitment in educational publishing, see Chiosso, *Gli scritti educativi di Carlo Tancredi Falletti di Barolo*, cit., pp. 125-147.

⁴⁶ French pedagogue and educator of the twentieth century, he developed a teaching method called «natural method». According to this method it was necessary to organize pupils' teaching referring to real life both for what concerned the instruments and the working methods. At the basis of the *École Freinet* there was the principle of cooperation used to engage children in all the subjects, including finance, related to the management of their activities: this in order to arouse in them the respect of common properties and a strong sense of group. In addition to the production of comics in the classroom, Freinet proposed, in his method, also the use of interschool correspondence between students and the introduction of cooperatives to use the mathematical and scientific principles learned by students during their studies. See, in particular: E. Freinet, C. Freinet, *Nascita di una pedagogia popolare*, Firenze, La Nuova Italia, 1972, and C. Freinet, *Le mie tecniche*, Firenze, La Nuova Italia, 1974.

⁴⁷ The school magazines, along with books, journals, papers, drawings, are an essential tool

Finally, physically and ideally connected to this floor, there is the new expositive wing dedicated to the history of children's book. This section of the museum, although it is an essential part of it, it also represents an independent element of the exhibition offered by the MUSLI. The novelty of this section is really important: there are, in fact, many important school museums⁴⁸, not only on an Italian level, but also on a European one, but there aren't still museums dealing only with the children's book.

The reason for this gap can certainly be traced in the fact that the rediscovery of children's literature is a recent operation in Italy, started since 1970s thanks to the pioneering work of important scholars such as Antonio Faeti⁴⁹, Pino Boero and Carmine De Luca⁵⁰ who have contributed to the appreciation of a type of cultural expression that has been considered for too long a simple substitute of traditional literature⁵¹. The School and the children's book Museum

for the understanding of the history of the school from the point of view of children and teenagers. The school paper, in fact, becomes an important evidence of the teamwork and of the process of socialization promoted by teachers and students for its layout, as well as the means by which the child can develop skills such as planning, division of labour, entrepreneurship, organizational capacity, artistic aptitudes. The presence in the exhibition of this section is innovative and very important because this type of material is very difficult to find in both private and public collections and archives for the lack of consideration it has enjoyed during the time and for the carelessness with which it is kept and transmitted. In this sense, an important exception is represented by the Fund "International Exhibition of school newspaper" of the historical archives of the National Agency for the Development of Education in Florence, which collects more than 1,200 periodicals produced by primary and secondary Italian schools (realized by hand or printed with stencils and limograph). For further information, see: J. Meda, *Per una storia della stampa periodica per l'infanzia e la gioventù in Italia tra '800 e '900*, in F. Loparco, *I bambini e la guerra. Il Corriere dei Piccoli e il primo conflitto mondiale (1915-1918)*, Firenze, Nerbini, 2011, pp. 7-24 (in particular see the note 12, pp. 15-16); M. Lodi, *Insieme: giornale di una quinta elementare*, Torino, Einaudi, 1974.

⁴⁸ Among the most important museums in Italy, in addition to that of Turin, it is useful to remember the School Museum-Schulmuseum of Bolzano and the Museum of the School of Castelnuovo di Assisi. Equally important are also the school museums run by academic institutions such as the Museum of History of Education "Mauro Laeng" of the University Roma Tre (see C. Covato, *Mauro Laeng Historical Museum of Didactics at University Roma Tre: present and future*, «History of Education & Children's Literature», vol. 1, n. 2, 2006, pp. 429-436 and F. Borruso, *A Museum of Schools in the Capital Rome*, «History of Education & Children's Literature», vol. 2, n. 1, 2007, pp. 323-345), the School museum «Paolo e Ornella Ricca» of the University of Macerata (see Meda, *Musei della scuola e dell'educazione*, cit., pp. 496-497 and M. Brunelli, *The «Centre for the documentation and research on the history of textbooks and children's literature» in University of Macerata (Italy)*, «History of Education & Children's Literature», vol. 4, n. 2, 2009, pp. 445-446) and The Museum of Education of the University of Padua, <<http://www.museo.educazione.unipd.it/>> (last access: March 3rd, 2013).

⁴⁹ A. Faeti, *Guardare le figure*, Torino, Einaudi, 1972; Id., *Letteratura per l'infanzia*, Firenze, La Nuova Italia, 1977.

⁵⁰ Boero, De Luca, *La letteratura per l'infanzia*, cit.

⁵¹ The inclusion, at the university level, of teachings devoted to children's literature in the curricula of graduate programs in Education Sciences has certainly contributed to a further recognition of this type of literature as a new and fruitful area of research with an important scientific value. About the research perspectives and the current state of the studies, see: A. Ascenzi, *La letteratura per l'infanzia oggi*, Milano, Vita e Pensiero, 2002, pp. 87-95 e 109-119.



Pic. 5. Materials for the teaching of arithmetic in the section *The Washerwoman and the Laundry Worker*.



Pic. 6. *The sala d'asilo*.



Pic. 7. The *Aula scolastica* of the early twentieth century. On the wall, the "*Pianta della Storia d'Italia dai tempi più remoti al 1913*".



Pic. 8. The *Tipografia in classe* by Freinet.



Pic. 9. The Children's Book Museum.

[Pic. 9], therefore, is placed explicitly in the wake of this new appreciation of the importance of children's literature underlining, also with its own name, how it has never considered itself only as a museum of the school, but how it has always considered the field of children's literature a fundamental part of the museum, as a sector closely linked with the children world, the schools, the publishing world and the world of artists, writers and illustrators. Considering illustrations as a constitutive and essential element for the definition of a children's book⁵², the exhibition opens with a section devoted to the display of several *original drawings* from the Archive of the SEI and from the Foundation of Tancredi di Barolo⁵³, that include the works of the most important Italian illustrators of the first half of the twentieth century such as Giovan Battista Carpanetto, Sergio Tofano, Attilio Mussino, Leonidas Edel, Gustavo Rosso, Antonio Rubino⁵⁴.

At the centre of the hall a large showcase further emphasizes the role of Turin in the field of national and international children's literature: in fact, it contains the most significant editions, from the point of view of their history, quality and artistic contributions, of the various publishers of Piedmont from the unification of Italy until after WWII⁵⁵. Among the most representative publishers there are important names such as Paravia, Loescher, Lattes, Einaudi and UTET; of the latter, in particular, it is also exposed the important *Scala d'Oro* ('Golden Staircase'), published in Turin since 1932 and that had the purpose of following the child (aged from six to thirteen) in its evolution guiding his readings. Through the example of the Golden Staircase, in particular, the MUSLI aims at the highlighting of the importance of book series in the editorial production of the various publishers as the result of a project that is not occasional, but gradual, reasoned and personalized according to the public's needs and age.

Finally, the *Cantuccio dei bambini* ('Children's Corner') shows the fertile interaction between books and media during the time. The book, in fact, far from being a mere object was able to modernize and renew itself taking (and giving in turn) valuable suggestions for its renewal from records, radio, film,

⁵² See P. Vagliani (ed.), *Il Viaggio incantato*, cit., p. 59.

⁵³ It is essential here a brief reference to the expositive solutions conceived by the MUSLI in favour of disabled visitors: large screens with touch screen controls and adjustable in height and books properly 'translated' in a tactile way to allow the use of the displayed materials in an alternative, innovative and complete way.

⁵⁴ The SEI exhibition, in particular, relies on the presence of about seventy original drawings (watercolours, oil painting, Indian ink, tempera or mixed media) of the early twentieth century that are examples of the *Art Nouveau*. It is one of the few archives of original illustrations preserved almost entirely in our country. The list of Italian illustrators present in the exhibition of the two archives is very vast: for more information about their figures, see Faeti, *Guardare le figure*, cit.

⁵⁵ For example: the first Italian translation of Alice in Wonderland (Loescher, 1872), the animated book *L'Automobile* 63-2170 (Libreria Internazionale Rosemberg & Sellier, 1910 ca.), the collection of fairy tales *Felicità* (Paravia, 1909), the elegant volume *Fiori della vita* (Lattes, 1904), an innovative magazine for children «Cuor d'Oro» (Alberto Giani Editore, dating back to the 20s of the twentieth century).

TV. The showcases full of books, movie posters, records, photographs and drawings display surprising multimedia products: discs printed on a special cardboard or volumes capable of narrating, through the texts and the colourful illustrations, the most famous Italian TV and radio programs of the years '40-'50, as well as the major films and animations that peeked out in Italy after the second World War.

A striking aspect of the Museum of the book is the amazing and fruitful blend of printed and electronic materials, through the presence, throughout the whole exhibition, of numerous tools (touch screens, speakers, projectors) that can provide an innovative and interactive museum experience, increasing the 'visibility' of the exposed materials. Through the multimedia workplaces, in fact, the visitors can carry out research on the authors and illustrators of the exhibition, view an exposition of works, virtually browse books listening to their stories, look at the illustrations.

The didactic workshops and the Conferences

The multimedia tactility the MUSLI allows you to experience is the most immediate representation of the whole idea that underlies the experience of visiting the Museum of Turin. Almost all the exhibited materials (except, for obvious reasons, the most rare and precious objects) are without protective showcases or cordon, without any sign indicating prohibition to touch, lay, sit, and so they can be touched, explored, discovered by the visitor. A so brave choice derives by the desire to give the child and the adult a complete and fascinating museum experience: in addition to the normal 'scientific' notions, in fact, a surplus of 'sensory' notions is given, that is certainly the key of the success of the Museum of Turin. In fact, it wants clearly to present not a history of the school conceived as a set of didactic tales, but a history of the school that, through a mechanism that could be called *emotional transfer*, can actually be connected to the life experiences of the thousands of annual visitors of the MUSLI, stimulating, with physical contact, also the emotional involvement.

In addition to the direct experience with the displayed objects, interesting workshops⁵⁶ are also offered to visiting school groups whose purpose is to put in contact, through play and direct experience, the young visitors to the patrimony preserved in the MUSLI.

The workshop *Scriviamo in bella!* ('Let's write a fair copy hand'), in particular, is aimed at providing students with a practical experience of the past school to learn issues and pedagogical principles underlying the material culture of the school and to stimulate a comparison between the present school

⁵⁶ Destined mainly to the students of primary schools.

and that of the past. The students, equipped with a collar, a muff to prevent stains, an exercise book, nibs and ink are guided along a path that deals not only with the practice of writing, but that also provides knowledge about the posture that the students had to assume while writing, the way in which the nib had to be held, the types of writing that could be obtained depending on the type of nib used.

A further workshop organized by the Museum in collaboration with the City of Turin ITER Growing up in the city, is *Torino ai tempi di Cuore: la scuola di ieri e oggi* ('Turin in the time of Cuore: the school yesterday and today'). The participants, in the setting of a classroom recalling the times of *Cuore*, are required to work on report cards, posters, medals and other teaching aids of the late nineteenth century, thus becoming the perfect schoolchild of the nineteenth century for two hours. Also in this case, the primary purpose is the desire to permit the children to confront with the daily life of a school of the past while providing, in a simple and immediate way, important knowledge about the history of the school and its connection with that of Turin.

In collaboration with the Teatro Regio in Turin there is, then, the workshop *GiocoSuonoImparo* ('I game, sound, learn') which is connected, instead, with the method of teaching music in the schools of the nineteenth century and which stimulates the pupil to sing, play, compose and recognize the sound of small musical instruments.

Finally, in the workshop *Il Primo Giorno di Scuola in 150 anni di storia d'Italia* ('The first day of school, across 150 years of Italian history') teachers and students can experience in an active way the atmosphere of the first day of school with a particular attention to three specific historical moments: the second half the nineteenth century (with the School of *Cuore*) the 20s (with the school during Fascism) and the 50s (with Alberto Manzi's experience).

In addition to the workshops, the Museum and the Foundation are actively involved in other projects in support of schools that imply, in addition to concrete plans for the recovery and the protection of the collections related to the school history and the children's literature in Piedmont, the promotion of exhibitions, conferences, meetings and lectures.

Among the numerous exhibitions organized in the course of the years we remember, for example, *C'era una volta un... re* ('Once upon a time... there was a king') at Palazzo Barolo from 26th April to 30th May 2004 that aims at the reconstruction of the historical evolution of the phenomenon of musical fairy tale through the exhibition of books, sheet music, illustrations, sketches of scenes and puppets, giving them new prestige and visibility⁵⁷. The exhibitions *Il meraviglioso Andersen* ('Wonderful Andersen')⁵⁸ (held from 14th December

⁵⁷ A guide to the exhibition was later published in the book Fondazione Tancredi di Barolo, *C'era una volta un... re. Fiabe in musica tra Otto e Novecento*, Torino, Studio Imagine, 2004.

⁵⁸ We recommend here the book published on the occasion of the exhibition: Fondazione

2005 to 22nd January 2006) and *La scuola dei premi* ('Prizes in school')⁵⁹ (held from 5th to 26th October in the Library of the Piedmont Region) are also very interesting: the former wanted to permit the public to know the history of the Italian editions of the famous Danish writer, while the latter wanted to highlight the story of the 'prizes' for the most deserving students that consist of books, medals, certificates, diplomas, tickets for puppets shows, but also 'store cards' and learning games⁶⁰. Among the various conferences⁶¹, instead, organized by the Foundation over the years here, in particular, we remember *I miei volumi corrono trionfanti. Primo convegno internazionale sulla fortuna di Salgari all'estero* which was held at Palazzo Barolo on 11st November 2003. The conference is particularly important because it is connected with the work of the Foundation for the discovery and revaluation of the figure of the writer of Verona and his deep links with the city of Turin⁶².

Future Perspectives

The general and chronic economic difficulties that are faced by the Italian cultural institutions is well known. Many museums, archives and libraries are underestimated in their fundamental role of protection, enhancement and transmission of the cultural, social and historical heritage and have seen the progressive diminishing of the already scarce economic resources provided by public and private institutions to support their activities.

Tancredi di Barolo, *Il meraviglioso Andersen: mostra bibliografica e di tavole originali per edizioni italiane delle fiabe di Hans Christian Andersen*, Torino, Fondazione Tancredi di Barolo, 2005.

⁵⁹ The exhibition catalogue is: Consiglio Regionale del Piemonte, *La scuola dei premi: libri e Giochi didattici tra l'800 e il '900. Collezione e catalogo della mostra a cura della Fondazione Tancredi di Barolo e Marco Albera*, Torino, F.lli Scaravaglio & C., 2011.

⁶⁰ Other exhibitions organized by prof. Vagliani and the Foundation Tancredi di Barolo were: *Aritmetica giocosa. Giocare con i numeri*, in 2001 (whose materials were then re-exposed in the exhibitions *Aritmetica Giocosa, Giocare con i numeri e l'Aguzzaingegni*, held in Genova to the Festival della Scienza in 2010); *Alice nella cantina delle meraviglie. Mostra bibliografica e percorso fantastico*, in 2003; *Le immagini del Sacro. Libri e giochi di divulgazione religiosa tra Otto e Novecento*, in 2005; *Piccoli Alpini. Libri e giochi sulla montagna di Otto e Novecento* del 2006; *Con Salgari da Torino nel mondo*, in 2007.

⁶¹ We also recommend: *Silvio Pellico e l'educazione. Manifestazione in occasione dei 150 anni dalla morte di Pellico* (10 ottobre 2004); *Intorno a Ciottolino* (16 aprile 2004).

⁶² In a hall of the Foundation Tancredi di Barolo a permanent exhibition on the figure of Emilio Salgari has been organized since 2007. It displays the original editions of the novels of the writer, significant historical translations of his works as well as original illustrations of his books (mostly related to the Viglongo editions), a multimedia workstation evokes a movie about the places of Turin related to the writer. Since 2008, the Foundation has established the prize *I Cavalieri dell'Avventura* in favour of those who have distinguished themselves in their efforts for enhancing the figure of the writer.

These difficulties have affected also a cultural and social institution such as the School and the children's book Museum of Turin who has seen, over the years, a progressive decrease in its public and private funding⁶³. This forced the Foundation to the prudent management of available resources thus limiting the realization of many new exhibitions or conferences. Despite the current problems, however, the Foundation continues to work hard to carry out his cultural 'mission', combining the history of the school, of education and of children's book with that of Turin, being always careful not to result in a sterile localism, but paying attention to the international dimension.

In this sense, Professor Vagliani continues to work for the organization of exhibitions and conferences with the purpose of bringing to light and making the public aware of important elements of the preserved heritage. In the near future, for example, two exhibitions are planned: an exhibition on Paolo Paschetto, an illustrator of evangelical books and magazines of the 30s and 40s of the twentieth century and author of the emblem of Italian Republic, and another exhibition about the educational manuals used in Egyptian schools during the 1930s and that can be reconnected, more generally, to the history of textbooks abroad.

Other important initiatives, however, are currently at the planning stage in order to make the educational activities promoted by the Foundation and the MUSLI more complete⁶⁴.

The 'enchanted journey' between the objects and settings of the Museum of Turin is fascinating and surprising, capable of guiding the visitor through the paths of discovery and rediscovery that combine the current reality with the history of Italy in the nineteenth and twentieth centuries. The MUSLI is an essential resource for scholars, educators, students, experts in the field, stimulating important and fruitful moments of reflection and analysis, but it is also represents an interesting and exciting discovery for all those who want to go, only for a few hours, into the classrooms in the time of *Cuore*.

⁶³ In particular, the Foundation receives public and private contributions for the management of the inauguration of a new section or of a new exhibition, but does not receive any subsidy for the ordinary management. The structure does not employ permanent employees, but people who work with fixed-term contracts, such as guides, or for free (there are currently 15 volunteers). It is therefore evident how all this leads to a perpetual state of uncertainty about the future of the institution.

⁶⁴ At the time of this writing, for example, workshops dedicated specifically to people with disabilities are at the planning stage.

The Pedagogical Museum «A.S. Makarenko» (Moscow): a look at the history, trying to understand the present and prognosticating the future¹

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ABSTRACT: This short article is aimed to present the Moscow Museum «A.S. Makarenko», established in 1983. The Museum has as its task the education of the students of the pedagogical schools and universities through the organization of educational activities and programs. This article consists of three sections. The first one tells us about the Moscow museums and their history, the second is about the meaning of the A.S. Makarenko's educational theory and the third concerns the activity of the museum and its collaboration with the International Makarenko Association.

EET/TEE KEYWORDS: History of education; Educational Institution; Museum Education; Pedagogical Theory; Russian Federation; XX Century (Museum).

Moscow is a first-rate cultural centre, where one can find museums of every historical-cultural category (from the first-rate federal museums up to small museums of education), being national – federal, municipal – federal, municipal

¹ The Museum's site is <<http://makarenko-museum.narod.ru>> (last access: December 19th, 2012). Its director is Anton Semenovitch Kalabalin. The most relevant publications about Makarenko in the last years had been issued by «Narodnoe obrazovanie» ([Popular Education]) in the series “Almanach”. See T. Кораблева, *Горьковская призма мировоззрения А.С. Макаренко* [Gor'kovskaja prizma mirovozzrenija A.S. Makarenko; The Gorki prism of A.S. Makarenko's conceptions. Almanach], Moscow, Narodnoe Obrazovanie, 2008, 1, pp. 103;

or private ones. There are museums of all kinds (up to the local culture preserve museums) and organizational arrangement: culture preserve museums, memorial estate, memorial flat, museums of the local history, museums of the enterprises, university museums, museums of the public organizations and so on.

However, there's not a historical – pedagogical orientation in the pedagogical specter of the pedagogical education. This process it is not set and it is not shown in its full range and uniqueness. The specialists find the cause of such a situation in the fact that, nowadays, history of the pedagogy experiences the deep crisis of the historicism and it has as its consequence the lack of interest of the society about the history. The public opinion in different ways apprehends pedagogical knowledge: it is said that there is a «useless abstractness», a «difficult dilettantism», and affirm that «in the pedagogical reality there's neither common sense, nor happiness, nor scientific character, nor example to imitate» and more on this tone.

History of Moscow indicates of that in the pre – Soviet time there was a pedagogical museum, founded by the pedagogical society of the Moscow University in 1903. Its fund consisted of exhibits and collections that professor of the Moscow University had given to the museum. In the first years of its life, Moscow pedagogical museum had more than three thousand items related to the pedagogical life of this time, and they were in demand by the people. There were organized tours, were held lectures, discussions, exhibitions in which took part famous scientists and pedagogues. Teachers took care of the methodological work and led training for their colleagues. In the Soviet time, many museums (including the pedagogical ones) closed down because of their «lack of need». It means that were no more their source, the private collections, they were no more fit for the ideology in force. Museums became «public centres for the political education of large range of the population», and, in fact, «state scientific institutions».

The idea about the creation of the museum «A.S. Makarenko» in Moscow, where had been living the last three years of his own life, arose a very long time ago. Since the end of the Forties famous pedagogue's wife had been taking a lot of

С. Аксенов, *Трудовая колония им. М. Горького как источник дальнейшего развития социально-педагогической деятельности А.С. Макаренко* [Trudovaja kolonija im. Gor'kogo kak istochnik dal'nejshego razvitija soz'jalno-pedagogicheskoj dejatelnosti A.S. Makarenko; The labour community "Gorki" as source of the further development of A.S. Makarenko's social-pedagogical activity. "Almanac"], Moscow, Narodnoe Obrazovanie, 2009, 3, pp. 33; С.С. Невская, *Год 1933 в жизни А.С. Макаренко. Неизвестные страницы биографии педагога-писателя* [God 1933 v zhizhni A.S. Makarenko. Neizvestnye stranizy biografii pedagoga-pisatelja; The year 1933 in A.S. Makarenko's life. Unknown pages of the pedagogue's biography-writer. "Almanac"], «Narodnoe Obrazovanie» [Popular Education], n. 4, pp. 33. Г.О. Гетманец, *Феномен А.С. Макаренко* [G.O. Getmanez. Fenomenon A.S. Makarenko; The phenomenon Makarenko. "Almanach"], «Narodnoe Obrazovanie» [Popular Education], n. 1, 2012, pp. 156.

attempts to inaugurate a museum in the home of the writer in the Lavruskinskij lane. In the Fifties and Sixties undertook this task E.S. Kuznetzova, founder and director of the Makarenko's circle under the Russian Federation Pedagogical Society, in the 1975 tried to do it the schoolmaster of the 'school plant' Chaika, V.F. Karmanov. However only in the 1983 the museum had been founded by an action group in the Moscow Pedagogical Society². Museum works on a volunteer basis, salaries are not paid and there are not funds for purchasing exhibitions.

But this museum has its own distinctive feature: the pupils' strong love and respect for this great pedagogue – educator of the Twenty Century, Moscow teachers, Makarenko's researchers, journalists and students had this museum built up with the force of their enthusiasm, with a deep faith in their mission. Museum named after «A.S. Makarenko» is placed in two exhibition halls, which tell us about his great pedagogical heritage. For over than 30 years of its work, museum has ever been public and every year is visited by a 1500 people, generally young students. Pedagogical process here arises from a special, aesthetically significant and full of information 'environment', where people can feel the closeness of the heroic deed of gifted pedagogues – practitioners and theorists, whose work has deal with the education and rehabilitation of the youth. They are real devotees, appreciating their socially useful work and educational activities with young people.

Museum education is not a school subject, but a process of familiarization for youth and adults with the culturally meaningful historical – pedagogical heritage, in which are reflected universal values, representing the human life (in this case, the Makarenko's life, the life of his colleagues, followers, successors, sharing his ideas and experience). During its life our museum has become a pedagogical one, and its pedagogical duty and more important feature is the education of educate a man worthily representing his own culture and history. The museum workers try to be aware of the their visitors' interests and, as much as possible, to answer to their needs, and desires concerning educational requests. You can see it in the Guest Book where for all these years have been left comments.

According to Andre Roll, a Norwegian researcher, the value of Makarenko's theory and practice is so great, that only the next generation could positively appreciate them. Makarenko's researchers from Russia, Ukraine, Germany, Hungary, Poland, Italy, Vietnam, China, USA, since 1991 united in the International Makarenko Association, fully share the opinion of Andre Roll,

² The Museum «A.S. Makarenko» has set as its aims to indicate the more modern aspect of the Makarenko's pedagogical theory and extend the knowledge about Anton Semenovitch Makarenko as far as possible. As matter of fact, the Museum is not merely a museum but a scientific and researcher centre in Moscow found on the initiative of such people as V.A. Korokovskij, G.A. Yavlinskij, who in the middle of the Eighties, during the so called perestroika, thought that A.S. Makarenko should help them in the solution of new social and pedagogical questions.

trying to bring closer the Makarenko's era everywhere, where it is need in a moral education of the youth. International Makarenko Association during 20 years of its life not only defended Makarenko from unfounded and hasty critic, but by common researches established a constructive dialogue between the Western and Eastern Europe³.

The historical meaning of A.S. Makarenko's pedagogical theory

A.S. Makarenko (Belopolie, 1888-Moscow 1939) was a reformer of the pedagogy. In his opinion «pedagogy goes through when the older generation gives its experience, its passion, its convictions to the younger generation». Namely it is the role, which the pedagogue has to play. The most important concepts of his theory relied on the union of respect and exactingness to the pupils and the education in the collective and through the collective. Respect for the pupil, first of all, means being able to trust in the individual, seeing the positive qualities of his character and behavior, means being able to rely on them in order to build education, to trust in the unlimited possibility of the human improvement. In addition, it was very important teaching the pupil to be self-controlled, to manage his feelings and actions. Makarenko's educational pedagogy was based on these principals. At the same time, besides the common program of pedagogy of the personality in the collective, it was needed an «individual correction». The main way to the «individual correction» the pedagogue found in the exact definition of the pedagogical purpose, in the planning of each pupil's personality. In Makarenko's opinion, the «new» (Soviet) pedagogy must be scientifically integral (synthetic), because the pedagogy has deal with a whole man, who will be educated not in parts, he «arises synthetically from the all sum of influence, which the personality undergoes». In this case, it's no need to think about «spreading of the pedagogy», the invention of names for these parts, which the man is composed of, their «numeration» and creation of a specified scheme – structure. The whole of it give nothing to the pedagogue in his practice, argued Makarenko⁴.

As a pioneering pedagogue, Anton Semenovich Makarenko strove at matching the education with the society development, being conscious that there is a unbreakable link between man and society, so far as the man is «first of all a socially active being, and a maker of social values». That's why he would create a brand-new pedagogy. He directed his ideas about the vivifying

³ T.F. Korableva, *Paper issued form the conference "A.S. Makarenko pedagogy and the solution of the problem of the modern youth"*, Moscow, Ed. Narodnoe Obrazovanie, 2012.

⁴ This presentation has been translated by Emiliano Mettini – Master of Philosophy, Deputy of the President of the International Makarenko Association (IMA).

believe in the Man namely to that new pedagogy: «I'm sure of it: if in the future someone gives to literature the image of an ideal man, our common work, the work of ourselves, pedagogues, gets significantly easier»⁵.

Makarenko's educational pedagogy, according to him, «was born not by the agonizing convulsions of a theoretical mind, but by the living movements of the people, by the traditions and reactions of a real collective, by the new forms of the friendship and discipline». Watching the situation in his country, sadly stated: «This pedagogy was born on all the territory of Soviet Union, but not everywhere is possible find that patience and persistence capable of achieving some results»⁶.

As pedagogue – researcher A.S. Makarenko was certain that pedagogy could and should «outrun society in its creativity about the man». He was able to show that through his living practice. Before his death (the 9th March of 1939), speaking to the students of Kharkov pedagogical university Makarenko said: «I feel that I'm a pedagogue, not only a pedagogue, but, first of all, every time and everywhere a pedagogue. My literature work is only a form of my pedagogical profession»⁷. As pedagogue, he had got worldwide recognition. On Makarenko's works began to refer researchers of different fields of knowledge studying the man and the society. In his social – pedagogical discoveries today are interested not only pedagogues, but and sociologist, politicians, psychologist, economists, medics, military men and religious figures. His rehabilitation – educational practice and unique pedagogical experience are used not only in the youth prisons. Widely they had been put into practice in the sociocultural ambient; where it is possible educate the people to the self- development and self-actualization.

Because of the force of his talent, the deep scientific logic, beauty of his soul, Makarenko presents himself as a leading personality. «The sever restraint and the sincere responsiveness, the high exactingness, the wise indulgence, the civic pride and critical attitude towards shortcomings were the human features, which he needed in his pedagogical practice»⁸. Pedagogy is a «complex art», but in many respects for Makarenko it remained «a complex and intricate science».

Nowadays in Russia quite often you can hear people insist that Makarenko created an educational system for the man living in a totalitarian society, that in his system the men are not free, it is not room for the individuality. In the common opinion, his system absorbs the individuality and dissolves it. Makarenko foresaw these objections and told that in the pedagogy there are

⁵ A.S. Makarenko, *Belles-lettres and the education of the youth*, in *Complete Works in 8 volumes*, Moscow, Prosveschenie, 1987, Vol. VII, p. 42.

⁶ A.S. Makarenko, *Flags on the towers*, Moscow, Ed. Faberlic, 2012, p. 127.

⁷ A.S. Makarenko, *My pedagogical beliefs*, in *Complete Works in 8 volumes*, Moscow, Prosveschenie, 1985, Vol. III, p. 278.

⁸ V.E. Gmurman, *A.S. Makarenko's pedagogical heritage and task of the educational pedagogy*, «Sovetskaja Pedagogika» [Soviet Pedagogy], Moscow, 1981.

two kinds of fear. The first one is the fear of the complexity and diversity of the individuality. This kind of fear provokes the urge towards that all the people have to be moulded by one cliché and to march in ranks. The second kind of fear manifests itself in the passive observation of each individuality, in the fear of new displays of the collectivity. Although this phenomenon manifests itself in two different ways, the fear is only one, but Makarenko was not affected of it.

Attempt to understand Makarenko as pedagogue quite often is explained by his charisma, by his talent in leading people and arising a lot of trust to himself not according his position, but because his special personal qualities. Charismatic leaders, who are called, so to say, from heaven to command and rule, do it so that they don't meet the resistance of these people, of whose they have to become leaders. On the contrary they give rise to enthusiasm, believe in their holiness, infallibility and nobleness. From this point of view, Makarenko presents himself as an individuality bringing inside itself the success of his pedagogy, needing neither conception nor helpers. If the whole matter is in his charisma, then Makarenko's experience is virtually unrepeatable, think Valerij and Vladimir Lukovy, who with Antonina Kovaleva are authors of the manual *The lessons of Makarenko*⁹. Personality can't suck in itself all the knowledge, which the mankind has, and is not able to do everything. Every action is deeply individual. A.S. Makarenko was a unique personality indeed, and his charisma emphasizes on it.

In the 1992 under the Museum named after A.S. Makarenko was founded the State Center for extra-school education «A.S. Makarenko» (*Centr Vneshkol'noj raboty "A.S. Makarenko"*, CEA). This institution of additional education is a place where growing people can exercise the right to choose the purpose of their life and achieve this goal. Such an approach promotes the development of children and youth's inclinations and abilities in their free time and gives them the opportunity to constitute themselves, according their interests and dispositions. In this new format, the pedagogical museum continued its work as a unit of the CEA. Museum leads researches into the Makarenko's pedagogical heritage and carries out educational activities about the Makarenko's pedagogical ideas, offering its own interpretation from the position of the modern scientific and practical knowledge, in compliance with the demands of the pedagogical practice. The visitors of the centre are students from the schools, lyceums, colleges, universities, teacher, managers of the educational service, researchers, military men, and parents.

In the Museum are kept original documents and object, telling about the history of pedagogy and public education, of the school and 'landmarks' of the education. Here is collected an unique archive of printed and typed documents

⁹ V. Lukovy, A. Kovaleva, *A.S. Makarenko's lessons*, Moscow, Kljuch-S., 2006.

about A.S. Makarenko and creative application of his ideas and practice, are displayed letters of Gorki colony and Dzerzhinsky commune's pupils to him, and a lot of personal objects belonging to the great pedagogue and writer.

The work of the museum and its collaboration with the International Makarenko Association

During the last years, the Museum activity has been in full swing: tours, round tables, professional advices from the Makarenko researchers, pedagogical film club for the students of the pedagogical university, pedagogical lecture centre for the teachers and the parents from Moscow and other cities. The museum has a close cooperation with Makarenko's well-known international and Russia scholars Goetz Hillig (Germany)¹⁰, Emiliano Mettini (Italy)¹¹, Andrej Tkachenko (Ukraine)¹², Anatolij Frolov (Nizhniy Novgorod)¹³, Svetlana Nevskaja (Moscow)¹⁴, Larisa Gritzenko (Volgograd)¹⁵, and many others.

There are many consolidated and protectively kept up traditions. A *Makarenko's Wednesday* (usually, the second Wednesday of each month) is organized monthly. These events are attended by people, who are interested in Makarenko's pedagogy and works. On the 13th of March there is the celebration of Makarenko's Birthday and the 1st of April the anniversary of the death, when flowers are laid on his grave in the Novodevichi cemetery. For the museum, there is another important event dedicated to the memory of A.S. Makarenko and intended to the continuation of the Makarenko's work, that is the participation (since the 2003) at the annual *Makarenko's International Contest* and the *Makarenko's Pedagogical Conference* (from the 1st until the 5th of April, yearly), where both theoretical and practical Makarenko researchers meet and effectively cooperate.

¹⁰ G. Hillig, N. Oksa, *A study about the birth of the Gorki Colony*, «Melitopol», n. 38, 2003, pp. 87-93.

¹¹ E. Mettini, *Ethic of the management in A.S. Makarenko's works: a way to the development of the personality*, Ekaterinburg, University Press, 2011, pp. 134-138.

¹² A. Tkachenko, *Professional and genetic potential self-government in A.S. Makarenko's educational institutions*, Ekaterinburg, University Press, 2008, pp. 137-141.

¹³ A. Frolov, *A.S. Makarenko: the school of life, of work and education in 5 parts*, Nizhniy Novgorod, Nizhegorodskii Gos. Pedagog. Universitet, 2007-2012.

¹⁴ S. Nevskaja, *In the creative laboratory of the psychologist Makarenko*, «Narodnoe obrazovanie» [Popular Education], n. 3, 1995, pp. 113-118.

¹⁵ L. Gritzenko, *A.S. Makarenko: the pedagogy for troubled children*, Volgograd, Volgograd University Press, 2003.

On the occasion of the 120th birthday of the pedagogue (March of the 2008), in the Moscow pedagogical museum was inaugurated the exhibition *A.S. Makarenko yesterday and today*. Exhibition items had been given our museum and private collections (the originator of the project is Vladimir Morozov).

The sections of the exposition recreate that time, when lived and worked the worldwide noted pedagogue, who was our compatriot. The exhibition includes a lot of interesting items: pictures and documents, manuscripts and letters of the pedagogue. Among the exhibits, there are books from Makarenko's personal library of around three thousand books. There on can see educational household and school items, patterns of the communards' production: electrical drills and "FED" cameras. The more precious exhibitions are the lifetime edition of *Road to life* and *Book for parents* and other Makarenko's works.

The famous French writer Louis Aragon thus spoke of *Road to life*: «There is no precedent for this book. Nothing can be in force to stop its strong impact and nothing can deprive it of the future».

It's very interesting visiting that section of the exhibition named *A.S. Makarenko and modern times*: photographs and document telling about the modern Makarenko investigations, the work of the International Makarenko Association for the revival and development in Russia of the Active Pedagogy. Since the 2003, International Makarenko Association in association with the «Narodnoe Obrazovanie» journal every year organizes the contest among school – factories and school – farms, boarding schools, orphanages, where children are educated by action and not by conversation about it.

The problem of the education of the rising generations has been and remains one of the more important questions in the human life. At the exhibition is showed the work of Moscow comprehensive schools, using the Makarenko's traditions in the educational practice with the youth today.

Since 2008 the Publishing house "Popular Education" (*Narodnoe Obrazovanie*) started to publish the Makarenko literary miscellany (two issues a year). In this literary miscellany, along with the interpretation of the Makarenko's heritage and the practice of education, of the experience of labour education in the Russian school – farms, we try to comprehend the deepest Makarenko's educational universals, which included Makarenko in the list of the more influents pedagogues of the Twenty Century.

An important event has become the participation of the museum in the annual exhibition *The best to the children* in the Manège (Moscou) and in the All-Russian contest *How does have to look a modern orphanage?*

For the comprehensive schools of the Moscow Western school district, the Pedagogical Museum «A.S. Makarenko» familiarizes wide ranges of population with the new interpretation of the Makarenko's educational practice, using interactive working methods of the museum. We try to rehabilitate the collective as the most important of social education, as a mean capable of harmonizing the relation of the individuality with the society.

The workers of the museum believe that their more honourable mission is the conservation and the dissemination of that pedagogically valuable, which is bound with Makarenko's life and works. It is necessary fill in the blanks of the pages of pedagogical history, continually addressing ourselves to such people as I.I. Betzkoj, K.D. Ushinskij, K.V. Rukavisnikov, S.T. Shatzkij, V.G. Kaschenko, M.S. Pogrebinskij, K.N. Ventzel, V.N. Soroka-Rossinskij, S.A. and G.K. Kalabalin.

In Makarenko's heritage there are a lot of hidden unclaimed things, which nowadays we really need in order to cope with the problems of education and of youth social rehabilitation. In connection with that, the Russian Makarenko association with the support of the International Makarenko Association initiated the project *Pupils*. The need of restoring the shaken faith of parents and pedagogues in the real power of the education process and in the strong reach ability of the pedagogical goals is about to happen and more and more grows.

Today every creative teacher, tending to the improvement and the development of the education, has the right to choose from that richness named «practice», and finds for himself more useful and valuable thanks to the our gifted predecessors

It's time to dare. Childhood is waiting for its gifted mentors, capable of understanding, believing, loving and defending.

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