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*Essays and  
Researches*



Saggi e  
Ricerche



# Rethinking the Role of European Colonization on Muslim Educational System in Indian Subcontinent (1757-1947)

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**ABSTRACT:** This paper highlights influence of colonizers on the Muslim educational systems of the Indian subcontinent which has a mixed reaction among Muslim educationists – some of whom consider colonization as an actor of educational development and most of whom found the devastating impact of colonization on Muslim education. This deserves rethinking the role of colonization on Muslim educational systems because without reflecting on it, current Muslim educational development would be impractical even it would be unknown to the Muslims that how the present came into being and what trends will dominate in the near future. The British modernized the education of India and this modernization does not contradict the essence and target of Islamic education if the education integrates Islamic epistemology with learning resources. Perhaps the clash starts when the scope of Muslim education is thought as the madrasah education but in fact madrasah education is only a part of entire Muslim education system.

**EET/TEE KEYWORDS:** Muslim education; Colonization; XVIII-XX<sup>th</sup> Centuries; Indian subcontinent.

## *Introduction*

The mid-20<sup>th</sup> century had a monopoly of British history writers who used to claim that implicitly or explicitly «the British in India had a civilizing mission whose object was to prepare Indians for the day when they could govern themselves»<sup>1</sup>. While in the second half of the 20<sup>th</sup> century another group of

<sup>1</sup> P. Harnetty, *The British Period of Indian History: Some Recent Interpretations. A Review Article*, «Pacific Affairs», vol. 37, n. 2, 1964, p. 179.

writers had evolved who identified the damaging aspects of colonialism, which was intentionally weakening of local people's beliefs by secularism leading to creation of «new class of natives» to function as intermediaries between the colonialists and the local masses<sup>2</sup>.

At the juncture of two extremist group of writers' opinions this paper delves into the past because without reflecting on it, current Muslim educational development would be impractical even it would be unknown to the Muslims that how the present came into being and what trends will dominate in the near future. Moreover, a nation's overall position, rise and fall are, to a large extent, determined by the standards of its educational system. Obviously the condition of the Muslim education in the contemporary Muslim world is rooted in the historical legacy of the colonizer countries, especially Britain and France who left the colonized countries in the mid-20<sup>th</sup> century. Britain and France each ruled millions of people through hundreds of policies in dozens of regions over centuries of history. Even it is said that before World War-I ended Europe had colonized 85 percent of the entire world<sup>3</sup>. During the colonial era, Britain and France established a number of institutions and legislated a wide range of policies to facilitate rule beyond their borders. They influenced millions of people, configuring their education, work, and laws, and shaping their identities and interactions with each other and with outsiders<sup>4</sup>. This paper highlights influence of colonizers on Muslim educational systems of Indian subcontinent which has been conceptualized by the Muslim educationists with a mixed reaction – some of whom consider colonization in favor of educational development and most of whom found devastating impact of colonization on Muslim education<sup>5</sup>. Ultimately the understanding deserves rethinking the role of colonization on Muslim educational systems of Indian subcontinent.

The colonized India was ruled by the British for two hundred years from 1757 to 1947<sup>6</sup>. This region consisting India, Pakistan, and Bangladesh has a long and renowned history that dates from the *Moguls*<sup>7</sup> times through the British colonial period up to the present. Before the reign of Moguls in

<sup>2</sup> B. J. Cook, *Islamic Versus Western Conceptions Of Education: Reflections On Egypt*, «International Review of Education», vol. 45, nn. 3-4, 1999, p. 340.

<sup>3</sup> E. W. Said, *Orientalism*, New York, Vintage Books, 1978.

<sup>4</sup> E. Bleich, *The Legacies of History? Colonization and Immigrant Integration in Britain and France*, «Theory and Society», vol. 34, n. 2, 2005, pp. 171-195.

<sup>5</sup> C. Whitehead, *The Historiography of British Imperial Education Policy, Part I: India*, «History of Education», vol. 34, n. 3, 2005, pp. 315-329.

<sup>6</sup> M. Ferro, *Colonization: A Global History*, London, Routledge, 1997.

<sup>7</sup> Mogul period refers to Mughal dynasty. The word Mughal also spelled Mogul, Arabic Mongol, Muslim dynasty of Turkic-Mongol origin that ruled most of northern India from the early 16<sup>th</sup> to the mid-18<sup>th</sup> century, after which it continued to exist as a considerably reduced and increasingly powerless entity until the mid-19<sup>th</sup> century. The Mughal dynasty was notable for its more than two centuries of effective rule over much of India, for the ability of its rulers, who through seven generations maintained a record of unusual talent, and for its administrative organization. A further distinction was the attempt of the Mughals, who were Muslims, to

India, education was given to only the Brahmin (the highest class of Hindus) but the Moguls changed the class-based education system<sup>8</sup>. Even they made educational institutions completely free of costs. Sultan<sup>9</sup> Sikandar Lodhi (1489-1517) made education compulsory to a certain level for government officials and armed forces; and declared the Persian<sup>10</sup> as the official language. While during the rule of Mogul Emperor Akbar (1556-1605), education «started moving away from its religious base because of his flexible policies and ultra-liberal measures»<sup>11</sup>. Later the British during their rule between 1757 and 1947 mixed political interest with education which was a conscious desire to reform Indian society by introducing English education and instilling an English sense of values in the Indian minds<sup>12</sup>. Currently the British education introduced in India has received a dire criticism which is mentioned in the following sections.

### *Criticism against Colonization*

Those who criticize colonization generally quote the Macaulay's Minute on Education which was presented in the British parliament as «we must at present do our best to form a class who may be interpreters between us and the millions who we govern; a class of persons, Indian in blood and color, but English in taste, in opinion, in morals, and in intellect»<sup>13</sup>. This was the political aim of the British education which changed the direction and course of the education system of India. The powerless people simply accepted the British policy of education in two ways: the Hindus appreciated and welcomed British education in terms of form (i.e. institutional education, and medium of instruction) and substance (i.e. knowledge based on scientific empiricism and secularism). While the Muslims partially accepted British education in terms of form and substance. Though some Muslims denied English as the medium of instruction but they introduced science education and integrated it with religious education<sup>14</sup>.

integrate Hindus into the empire. (Cited in Encyclopædia Britannica, available in <<http://global.britannica.com/EBchecked/topic/396125/Mughal-dynasty>>).

<sup>8</sup> S.M. Khalid, M.F. Khan, *Pakistan: The State of Education*, «The Muslim World», vol. 96, n. 2, 2006, p. 306.

<sup>9</sup> Sultan was the title of the emperor.

<sup>10</sup> Farsi language of Iran.

<sup>11</sup> Khalid, Khan, *Pakistan: The State of Education*, cit.

<sup>12</sup> Harnetty, *The British Period of Indian History: Some Recent Interpretations. A Review Article*, cit., p. 191.

<sup>13</sup> A. Riaz, *Madrassah Education in Pre-Colonial and Colonial South Asia*, «Journal of Asian and African Studies», vol. 46, n. 1, 2010, p. 78.

<sup>14</sup> R. Kochhar, *Muslim and English Education in Colonial Bengal: Calcutta Madrasa and Hooghly Mohsin College in a Historical Perspective*, «Hooghly College» vol. 175, 2011, pp. 17-39.

From this point of Muslim policy of educational adjustment with the British education policy it has been noted that in Indian subcontinent the Muslim education existed in a variety of historically and regionally determined organizational shapes<sup>15</sup>. At present not only in India but globally the education in Muslim countries is «dualistic»<sup>16</sup>. Dualism in education signifies «two different systems of education; traditional Islamic system (religious education) and modern secular system (modern education). Religion is compartmentalized as one subject, namely Islamic Studies, among many subjects taught in the modern secular system»<sup>17</sup>. In order to resolve this dualism, a world conference was organized in Makka<sup>18</sup> in the year 1977. One of the recommendations of this conference was to integrate modern elements into the Islamic education and vice versa<sup>19</sup>. Muslim thinkers found that the «philosophical shortcoming of most modern systems of education in the Islamic world is that they do not reflect the fundamental aims and objectives of Islamic education»<sup>20</sup>. Muslim educationists blame and condemn the colonizers for this trend of secular education because according to them it is a barrier to Islamic education. Such a comment includes for example:

The concept of education in Islam has been influenced by secularism since the time of colonization and the collapse of the Ottoman Empire which consequently resulted in the failure of the Muslim Ummah in its quest for nation-building and development according to Islamic perspective<sup>21</sup>.

While it was true that during the colonial period, several education institutions were established in Muslim majority countries in order to produce employees who would fulfill the bureaucratic and administrative needs of the colonial states. The teachers, and teacher trainers were trained with an especial instruction of producing pro-colonizers citizens. Teachers were assigned to work in rural areas where peoples' occupation is agriculture and where people needed health services<sup>22</sup>. Married teachers were chosen for training the teachers and villagers for while the husband contributed village improvements through

<sup>15</sup> Y. G-M. Lulat, *Comparative Perspectives on Islamic Identity and Issues of Education in the Aftermath of September 11, 2001*, «Comparative Education Review», vol. 50, n. 3, 2006, pp. 518-527.

<sup>16</sup> R. Hashim, *Educational Dualism in Malaysia*, Kuala Lumpur, The Other Press SDN. BHD., 2004.

<sup>17</sup> R. Firdaus, M.S. Jani, *Islamic Education: The Philosophy, Aim, and Main Features*, «International Journal of Education and Research», vol. 1, n. 10, 2013, p. 12.

<sup>18</sup> A city situated in Kingdom of Saudi Arabia.

<sup>19</sup> S. M.A. Al-Attas, *Aims and Objectives of Islamic Education*, Jeddah, Saudi Arabia, Hodder and Stoughton, 1979.

<sup>20</sup> Cook, *Islamic Versus Western Conceptions Of Education: Reflections On Egypt*, cit., p. 346.

<sup>21</sup> Firdaus, Jani, *Islamic Education: The Philosophy, Aim, and Main Features*, cit., p. 11.

<sup>22</sup> C.M. Catterns, *Teacher Training in the British Colonies*, «Journal of Negro Education», vol. 14, n. 2, 1945, pp. 251-253.

agriculture, housing and sanitation, his wife learnt the elements of child welfare, the principles of nutrition, dairy work or some equivalent<sup>23</sup>.

By knowing the above mentioned British colonizer's intentional efforts to bring changes in the local education in order to get the political benefit, many Hindus, Muslims, Buddhists of the Indian subcontinent disapprove British colonial education. This is very typical that Muslims are antagonistic to colonial education in general, especially in those countries that had colonies in the past<sup>24</sup>. Not only that, but also the Buddhists were uncomfortable under the British rule in India. Barua criticized colonial legacy of materialism, acquisitiveness, and social exclusion which led the post-colonial education to cultural homogenization through centralized and standardized curriculum in education<sup>25</sup>. The criticism mentioned above is somewhat unbalanced, which deserves a balanced criticism demonstrating both advantage and disadvantage of the British colonization's impact on the Muslim education in the Indian subcontinent.

### *Balanced Criticism: Colony as a Way to Modernization*

The balanced criticism can be justified by the explaining pre-and-post colonial educational conditions of Indian subcontinent and the way Muslim education faced modernization is not full of bad elements. A trend of modernization of Islamic religious education has been observed in Indian, Pakistan, and Bangladesh. For example, in India an Islamic religious education institution called *Darul All Dewband* was established in 1866 which used to hold traditional views of Islamic religious sciences and not to accept any changes in curriculum and pedagogy. But in the changing world the young graduates of this institution who hold different views regarding traditional education think that:

We need ulama (Muslim scholars) who are familiar with both religious as well as modern knowledge to serve the community and reply to the attacks on Islam from the West in the West's own language<sup>26</sup>.

This view is not being spoken by a small number of Islamists, rather in India «numerous madrasahs<sup>27</sup> and Muslim organizations are indeed making creative

<sup>23</sup> *Ibid.*

<sup>24</sup> M. Heper, *Islam, Modernity, and Democracy in Contemporary Turkey: The Case of Recep Tayyip Erdogan*, «The Muslim World», vol. 93, 2003, pp. 157-185.

<sup>25</sup> B. Barua, *Colonialism, Education and Rural Buddhist Communities in Bangladesh*, «International Education», vol. 37, n. 1, 2007.

<sup>26</sup> Y. Sikand, *The Indian Madrassahs and the Agenda of Reform*, «Journal of Muslim Minority Affairs», vol. 25, n. 2, 2005, p. 224.

<sup>27</sup> The word «madrasah» has been mentioned many times in this paper. Riaz explained that the word madrasah is an Arabic word whose literal meaning is “school.” The word comes from the Arabic root «dars», which means a lesson or an instruction. In Arabic-speaking regions, it

attempts to combine Islamic and “modern” education»<sup>28</sup>. Sikand mentioned names of seven institutions and some publishers who have been publishing hundreds of books and producing thousands of graduates since 1930s. Therefore, from a small group’s hostility made against modern education one should not generalize that Muslims worldwide remained conservative in the XXI<sup>st</sup> century. Nor it should be said that modernization started by the British is not manageable or cannot be adjusted with Islamic education system. Mawdudi (1903-1979) for instance introduced the concept of bridging between Islamic traditional education and secular British education<sup>29</sup>.

Those who quote the devastating nature of British education they quote its one side. While it was true that during the colonial period, the Western institutions of education were established in Muslim majority countries in order to produce employees who would fulfill the bureaucratic and administrative needs of the colonial states. It is also true that the current Muslim education has been developed after it accepted and adapted the western education system. If the western education system was destructive people of the colonized countries would have changed entire education system, education objectives, goal and so forth.

After the British had left the Indian subcontinent in 1947 the social foundation of education, including the social aim of education was not significantly changed. For instance, curriculum development is still happening in within political, social, economic and cultural contexts what happened during the colonial period. Even the teacher student relationship remained the same. Moreover, in the post-colonial period the education has been commercialized and the academic certificates have become valuable for career and social status. These changes indicate that they have value and necessity in the changing world which just started during the colonial period. People are keeping acknowledging the legacy of the British empire because the British had introduced something modern and influential.

Those who criticize the influence of colony cannot deny that the Muslim education system during colonized period needed development both in form and substance. Even the influence of international factors on education curriculum, learners’ quality, and socio-developmental approach was undeniable and unavoidable. If the British had not come the Muslim education would take its own way to change in the light of its contemporary overwhelming practices.

does not specifically refer to a religious seminary; instead schools of various levels are referred to as madrassahs. However, in non-Arabic speaking societies this word has assumed a different meaning, and is often understood to designate a special kind of institution for the training of ulama (meaning literally scholars, plural of alim).

<sup>28</sup> Y. Sikand, *Bridging Deen and Duniya: The ‘Modernisation’ of Islamic Education in India*, «Journal of Muslim Minority Affairs», vol. 29, n. 2, 2009, p. 246.

<sup>29</sup> S.A.A. Mawdudi, *The Education*, S.M.A. Rauf (ed.), New Delhi, India, Markazi Maktaba Islami Publishers, 2000.



Moreover, division of knowledge according to expertise was not implemented in the education of that period. At the same time it is also true that in the process of educational development the British rules ignored and disregarded the culture, tradition, and the belief system of Muslims, though their effort led the modern Muslim education to get this current form and orientation in this XXI<sup>st</sup> century.

While the purpose of education in Islam is to educate the human being with the source of knowledge, i.e., the revealed scriptures, and with its aim to produce a good human being who is capable of delivering his/her duties as a servant of the God and His vicegerent on earth<sup>30</sup>. It is no harm to achieve this goal of Islamic education by its modernization. Some Islamic scholars of XX<sup>th</sup> century, such as Jamaluddin Afgani (d. 1897), Muhammad Abduh (d. 1905), Muhammad Rashid Rida (d. 1935), Hasan al Banna (d. 1949), Abul Ala Moududi (d. 1979) developed several models of Islamic education by accepting modernization and integrating it with Islamic education<sup>31</sup>. Basically Islamic education has been derived from the Quranic terms in Arabic language they are tarbiyah «to cause to grow», ta'dib «to refine, to discipline», and ta'lim «to instruct» that are three basic dimensions of education including individual development «from the meaning of tarbiyah», social and moral education «from the meaning of ta'dib», and acquisition of knowledge «from the meaning of ta'lim»<sup>32</sup>. These three dimensions of Islamic education ultimately help human to perform as the Khalifah «vicegerent» of Allah<sup>33</sup>.

As a vicegerent of the God, one has to take the responsibility of others. Meaning of vicegerent implies to be a manager, leaders and so on. So vicegerents must have the ability to manage their personal lives and their socio-political lives. Islam asks people to acquire expertise in different fields as the means of building the kingdom of God on earth<sup>34</sup>. Modernization cannot be contradictory of this target of Islam.

The recent development of the concept of Islamization of Education has emerged as a means of modernizing of Islamic traditional education which in reality was the byproduct of the Muslim's reaction against the colony. Basically traditional Muslims' education was different from the Muslim education that exists now. In course of time with the presence of colony traditional Muslim education was reformed and got new shape. This paper also highlights the

<sup>30</sup> Firdaus, Jani, *Islamic Education: The Philosophy, Aim, and Main Features*, cit., p. 11.

<sup>31</sup> S. Baba et al., *Qur'anic Methodology for Integrated Approach in Knowledge and Education: Implications for Malaysian Islamic Education Strategy*, «The American Journal of Islamic Social Sciences», vol. 32, n. 2, 2015.

<sup>32</sup> K. Bagheri, Z. Khosravi, *The Islamic Concept of Education Reconsidered*, «The American Journal of Islamic Social Sciences», vol. 23, n. 4, 2006, p. 91.

<sup>33</sup> The Supreme God according to Islamic belief.

<sup>34</sup> T.M. Zayed, A. Al-Mizan, *History of Emancipatory Worldview of Muslim Learners*, «History of Education & Children's Literature», vol. IX, n. 2, 2014, p. 638.

historical influence of the west in reforming Muslim education. We argue that the Muslim renaissance in education started to grow when Muslim found themselves dependent upon the west, which means if the West had not come to the Muslim land the Muslim might have remained as they were before.

### *Muslim Education of Indian Subcontinent before Colony*

Pre-colonial Muslim education in India was connected with the history of «Madrasah Nizamiyah» of eleventh century established by Mullah Nasiruddin Tusi (d. 1064) in Baghdad<sup>35</sup>. Muhammad Ghori introduced the Turkish rule in India in the late 12<sup>th</sup> century and subsequently established a madrassah in Ajmer in 1191 which is considered the first institutionalized madrassah in South Asia<sup>36</sup>. However, classical Muslim education institutions in India founded under under Sultan Mahmud Ghaznavi (979-1030), who patronized many education institutions and who established an extensive empire that consisted of modern Pakistan, eastern Iran, Afghanistan, and northwestern India. Islamic religious schools became widespread after the beginning of the Delhi sultanate in 1206, which were centers of learning for the sons of rulers and personnel for government administration<sup>37</sup>. In India education was offered through three modes: formal institutions (in the form of maktabas & madrasahs), informal institutions (in the shape of individual centers of teachings) and private teachers and tutors (known as muallim, muaddib or ataliq)<sup>38</sup>. The typical subjects taught in those institutions were 1. Grammar, 2. Literature, 3. Logic, 4. Islamic Law and its principles, 5. Qur'anic commentary, 6. Hadiths, 7. Mysticism, 8. Scholasticism (religious philosophy)<sup>39</sup>. Riaz summarized the pre-colonial education in India that:

Many of the pre-colonial rulers of South Asia, including the Mughals (1526-1857), played key roles in promoting education and providing patronage of various educational institutions, including madrassahs. The policies of the British colonial rule (1757-1947), however, made

<sup>35</sup> M. Ahmad, *Madrasa Education in Pakistan and Bangladesh*, in S.P. Lamiyae, R.G. Wirsing, M. Malik (edd.), *Religious Radicalism and Security in South Asia*, Honolulu: Asia Pacific Centre for Security Studies, 2004, pp. 101-115.

<sup>36</sup> Riaz, *Madrasah Education in Pre-Colonial and Colonial South Asia*, cit.

<sup>37</sup> Classical Islamic Education Institutions in Hindustan, Last modified December 2012, <<http://www.wdl.org/en/item/9689>> (last accessed: December 20<sup>th</sup>, 2014).

<sup>38</sup> Z. Islam. *Origins of Madrasahs in India predates Muslim period*, Last modified November 2010, <<http://www.milligazette.com/news/178-origins-of-madrasah-education-in-india-predates-muslim-period>> (last accessed: December 20<sup>th</sup>, 2014).

<sup>39</sup> Riaz, *Madrasah Education in Pre-Colonial and Colonial South Asia*, cit.

the most indelible marks on madrassah education, not only directly, wherein their policies have impacted on the structure, functions and curriculum of madrassahs, but also indirectly, through the prompting of responses from the ulama and the Muslim community that determined the contours and the content of madrassah education<sup>40</sup>.

He furthermore summarized the pre-colonial education in Bengal in the eastern parts of India (modern name is Bangladesh) that the Sufis, saints, and holy men began arriving at Bengal as early as the late 7<sup>th</sup> century. The foundation of Islamic education in Bengal was established by those Sufis, saints, and holy men. But in Bengal, the institutionalization of Islamic education began during the period of the Delhi Sultanate, which existed between 1201 and 1528 under various dynasties. In early of the Delhi Sultanate Bakhtiyar Khilji expanded his rule in Bengal, founded a new city called Rangpura, where a number of madrassahs were established.

### *Muslim Education of Colonized Indian Subcontinent*

Muslim education of colonized Indian subcontinent was characterized by the establishment of 1) Darul Ulum Nadwatul Ulama in Lucknow, 2) Darul Ulum Dewband, and 3) Madrasa Alia in Calcutta<sup>41</sup>. Interestingly three of them were the outcomes of British colonization.

The need of the British administration for educated Muslims to work in various posts of the civil service led the British to establish special kind of madrasa in 1781 called Madrasah Aliyah. Warren Hastings instituted this madrasah in Calcutta. This madrasah used to give instruction in the Persian and Arabic languages. It used to teach the learners natural philosophy, theology, law, astronomy, geometry, arithmetic, logic, rhetoric and grammar just to qualify the Muslims of Bengal region for public service and to enable them to compete on more equal terms with Hindus for employment under government<sup>42</sup>. In course of time the Muslim education flourished in Bengal following the development of Calcutta Aliya Madrasah<sup>43</sup>.

Darul Ulum Dewband established based on the Dars-e-Nizami but the novelty of this institution is that it is unlike original promoter institute of Dars-

<sup>40</sup> *Ibid.*, p. 70.

<sup>41</sup> A. Riaz, *Faithful Education: Madrassahs in South Asia*, New Jersey, Rutgers University Press, 2008.

<sup>42</sup> S.H. Vazhathodi, *A Proposed Framework for the Curriculum of Islamic Education: Implication on the Curriculum of Islamic Religious Higher Education Institutions in Kerala, India*, dissertation submitted in fulfilment of the requirement for the degree of Doctor of Philosophy in Education (Curriculum and Instruction). International Islamic University Malaysia, 2011, p. 42.

<sup>43</sup> Kochhar, *Muslim and English Education in Colonial Bengal: Calcutta Madrasa and Hooghly Mohsin College in a Historical Perspective*, cit.

e-Nizami very organized and structured. Riaz mentioned that Darul-ulum Dewband was the challenge to the British colonizer to show them that Muslim educationists can offer structured education like the British education system<sup>44</sup>.

When Muslim rule declined with the advent of the British Raj, Islamic religious schools lost their reputation as centers of excellence and suffered in competition with modern education. The involvement of Ulama (Muslim educationists) in the 1857 rebellion against the British army made them suspect to the British, but Islamic education revived with the establishment «Darul Uloom Deoband» an Islamic education institution at Deoband in 1866. This institute played a dual role in disseminating Islamic knowledge and mobilizing Indian Muslims to participate in the nationalist struggle aimed at expelling the British<sup>45</sup>.

Vazhathodi mentioned that when the Muslim scholars and fighters had become unsuccessful in the rebellion in 1857 they established the traditional madrasah.

The 1857 event was the first episode in the struggle to evict the British and to drive them from India. It was politically and intellectually led by the ulama. Consequently, after the event, the British targeted many religious leaders, many madrasa were closed and their properties were confiscated. However, the ulama reacted to the challenges vigorously by establishing madrasa and educational institutions throughout India. They were creative and timely in reacting to these threats and made madrasah the institutional basis of their work<sup>46</sup>.

Finally, Darul Ulum Nadwatul Ulama established in India in 1894. Unlike Dewband the institute «Darul Ulum Nadwatul Ulama» made the Arabic language as the medium of instruction<sup>47</sup>. Nadwa was dependent on the scholars of Deoband and support from the Western-educated elites in order to succeed in becoming the all-inclusive institution the founders wanted it to be. The founders' emphasis and importance of Arabic language was due to their contacts with the Arabic-speaking scholars of 18<sup>th</sup> and 19<sup>th</sup> century, particularly the Egyptian reformists including Muhammad Abduh (1849-1905). As a result, Nadwa included in the curriculum the modern history, spoken Arabic in the curriculum, and encouragement of intellectual debate instead of memorization and blind adherence to the teachers' views were among these changes<sup>48</sup>.

<sup>44</sup> Riaz, *Madrasah Education in Pre-Colonial and Colonial South Asia*, cit.

<sup>45</sup> See <http://www.wdl.org/en/item/9689> (Accessed: December 20<sup>th</sup>, 2014).

<sup>46</sup> Vazhathodi, *A Proposed Framework for the Curriculum of Islamic Education: Implication on the Curriculum of Islamic Religious Higher Education Institutions in Kerala, India*, cit., p. 43.

<sup>47</sup> In Dewband Urdu language is used as the medium of instruction. See Riaz, *Faithful Education: Madrasahs in South Asia*, cit., p. 77.

<sup>48</sup> *Ibid.*

### *Muslim Education of Indian Subcontinent in XXI<sup>st</sup> Century*

Muslim educational revival in the modern Indian subcontinent including Pakistan and Bangladesh took place in the course of millennial historical development. At present the education system in the Muslim world holds a dual nature<sup>49</sup>. They are secular education system supported by the government which is often seen as a legacy of colonial era<sup>50</sup> and an Islamic religious education system mostly run and funded by non-government arrangement<sup>51</sup>. Although all Islamic education institutions have a general purpose of providing Islamic religious knowledge, the overall education of the current Muslim world differs to that of Muslim world existed between 15<sup>th</sup> and 20<sup>th</sup> centuries<sup>52</sup>. At present in India the number of Madrasah offering Muslim education has been estimated to be around 40,000 (forty thousand)<sup>53</sup>. Indeed madrasah is a first choice for many Muslims because it does not charge money from the students<sup>54</sup>. Muslims are the largest minority community in India (14-15 percent in the total population). According to the Ministry of Home Affairs, in India:

There are 721 madrasahs catering to over 1,20,000 children in Assam, 1,825 madrasahs catering to over 1,20,000 children in Gujarat, 961 for 84,864 children in Karnataka, 9,975 for 7,38,000 children in Kerala, 6,000 for over 4,00,000 children to Madhya Pradesh and some 1,780 catering to over 25,000 children in Rajasthan. In Uttar Pradesh, the number of maktabas is more than 15,000 and madrasahs over 10,000 and there are 3,500 madrasahs in Bihar<sup>55</sup>.

The format of the education imparted to the students of madrasahs ought to be modified keeping in view the shifting demands of the employers – a concern which can no longer be under-played<sup>56</sup>.

<sup>49</sup> Hashim, *Educational Dualism in Malaysia*, cit.

<sup>50</sup> Cook, *Islamic Versus Western Conceptions Of Education: Reflections On Egypt*, cit.

<sup>51</sup> Lulat, *Comparative Perspectives on Islamic Identity and Issues of Education in the Aftermath of September 11, 2001*, cit.

<sup>52</sup> C.N. Hashim, H. Langgulong, *The Muslim World and the West: The Potential of Educational Institutions in Building Bridges in the Context of Malaysia*, «Bulletin of Education & Research», vol. 29, n. 2, 2007, pp. 1-17; Id., *Islamic Religious Curriculum in Muslim Countries: The Experiences of Indonesia and Malaysia*, «Bulletin of Education & Research», vol. 30, n. 1, 2008, pp. 1-19.

<sup>53</sup> S. Dubey, *An Overview of Government of India Initiatives in the Field of Primary & Secondary Education*, «Indian Journal of Applied and Clinical Sociology», vol. 9, n. 1, 2014, pp. 71-86.

<sup>54</sup> D. Soni, *Muslim Education: A Study of Madrasahs*, CCS Researching Reality Internship, India, 2010.

<sup>55</sup> Dubey, *An Overview of Government of India Initiatives in the Field of Primary & Secondary Education*, cit., p. 84.

<sup>56</sup> *Ibid.*

In Pakistan, Bangladesh and Indian, the madrasas mostly follow the curriculum of Darul Ulul Deoband<sup>57</sup>. Ahmad mentioned regarding the madrasah classification in Pakistan that:

the madrassas in Pakistan are categorized as: (1) ibtedai (elementary), where only the Quran is memorized and taught; (2) vustani (middle level), where selected books from Dars-i-Nizami are taught; and (3) fauquani (higher level), where the entire Dars-i-Nizami is taught. In some madrassas where competent ulema are available, students after their graduation take up post-graduate courses of study in tafsir, hadith, or fiqh<sup>58</sup>.

He further mentioned regarding the madrasah education in Bangladesh that:

Unlike Pakistan, Bangladesh has two kinds of madrassas: Quomi madrassas – estimated at more than 6,500 at the secondary, intermediate, and higher levels with about 1,462,500 students and 130,000 teachers. These Quomi madrassas in Bangladesh, which are predominantly of Deobandi persuasion, teach the standard Dars-i-Nizami<sup>59</sup>.

### *Conclusion*

It is true that Hindus were comparatively happy with the arrival of the British because they wanted to get rid of Muslim rule. They felt comfort under the British rule<sup>60</sup>. Before colonization in India, the education system was influenced by Mughal empire. The education was provided in madarassas and makatabs officially. Colonization can be regarded as the originator of modern education system in India. The way the British reformed non-religious education contributed to the reformation of Muslim religious education and madrasahs. Such as the present system is English oriented system. Lord Macaulay introduced a minute in which English was introduced as a medium of instruction and his theory of downward filtration. Downward Filtration means flow of English and English system from upper class to lower class, which is reaching now. Then Wood Dispatch (1854) set up District of Public Instructions (1862) and set up Calcutta, Madras and Bombay universities (1857). Then in 1904 Lord Curzon gave education policy resolution in which entry of private enterprises were allowed in primary and collegiate education. Sadler Commission was introduced in 1917 in which Board of secondary school was established. Sargent Report (1944) Introduced: Pre-primary stage (Nursery), two types of

<sup>57</sup> Ahmad, *Madrassa Education in Pakistan and Bangladesh*, cit.

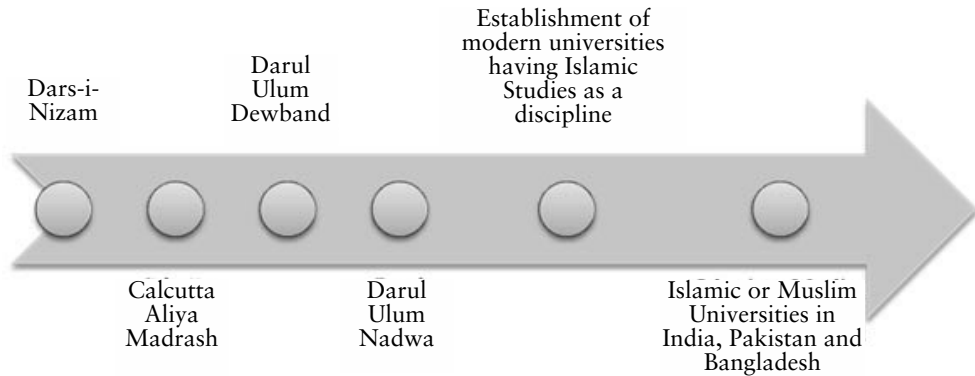
<sup>58</sup> *Ibid.*, p. 104.

<sup>59</sup> *Ibid.*

<sup>60</sup> Kochhar, *Muslim and English Education in Colonial Bengal: Calcutta Madrasa and Hooghly Mohsin College in a Historical Perspective*, cit.

schools – Junior Basic Schools (6-11 years of age), Senior Basic Schools (11-14 years), High Schools (11-17 years) and was bifurcated into academic and technical education.

In conclusion, as a result of colonization in course of time the education in general and the Muslim education in particular is continuously changing. The changes are endless and an effort and a journey towards the perfect education for the Muslims. This process can be marked by the following Picture 1.



Pic. 1. Development of Muslim Education.

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# Schooling system in Galicia at the end of the 19<sup>th</sup>- beginning of the 20<sup>th</sup> centuries

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**ABSTRACT:** The aim of this article is to analyze the state of national education system in Galicia from the end of the nineteenth century through the beginning of the twentieth century, as well as the role of educational organizations and communities in its development.

**EET/TEE KEYWORDS:** National education system; Schooling; Educational community; Language of instruction.

The system of education in Galicia (present day Western Ukraine) at the turn of the twentieth century was greatly influenced by the State Educational Law<sup>1</sup> created May on 14<sup>th</sup> 1869. The underlying principles of this State Law were compulsory education, accessibility to education for all ethnic groups, and linguistic equality and freedom in selecting one's language of instruction. At the same time, regional laws in Galicia made most of these principles obsolete, as they were aimed at denationalization of the native-born populace by imposing language restriction and a specific content of study. These changes in the system of education greatly influenced many Ukrainians. This period can be characterized by the considerable development of the educational system, which

<sup>1</sup> P. Malaniuk, *Osvitni tendentsiji ta idealy prosvitnytskyh spodvyzhykiv Halychyny* [Educational tendencies and ideals of Galicia educational activists], Ternopil, 2000 (in Ukrainian).

in turn led to the immense awakening of national Ukrainian consciousness. The people of Galicia started to express their desires for the creation of national educational institutions.

The aim of this article is to analyze the state of the national education system in Galicia at the end of the nineteenth century through the beginning of the twentieth century, as well as the role of educational organizations and communities in its development.

At the end of the nineteenth century and the beginning of the twentieth century Galicia was known as a polyethnic region of the Austrian-Hungarian Empire in the Kingdom of Galicia and Polimeria. Ukrainian citizens at this time represented the ethnic minority group. As a result, the ethnic minority status of Ukrainians had a negative influence on the regulation of educational institutions. On June 22<sup>nd</sup>, 1867, the State School Council<sup>2</sup> was created in Galicia. This coincided with the adoption of a language law, which was sanctioned by the Emperor in spite of Ukrainian ambassadors' opposition. According to this law, the language of instruction utilized in the local schools was approved at meetings of the local Public councils. As a result, several languages of instruction were used in the primary school system. In secondary schools, the German language was substituted for the Polish language, and the Ukrainian language became an optional language choice. Only in the junior classes of the Lviv Academic Gymnasium was Ukrainian allowed as language of instruction<sup>3</sup>. Changing the status and importance of the Ukrainian language and establishing the Ukrainian language in Galicia schools was only possible with the approval of the Lviv Sejm (Parliament), a process that proved very difficult. Eighty percent of the members of State School Council were Polish and twenty percent were Ukrainians. As a result, a Polish language educational system dominated within the state, although both the Ukrainian and Polish languages held little importance in regional school councils. This immersing Ukrainian language suppression lead to an active and continual struggle for the rights of Ethnic Ukrainians in Galician schools. Parliament meetings were dominated by the continual complaints and interpellations referencing the Ukrainian language use in Galician schools<sup>4</sup>.

Progressive Galician activists saw the establishment of private educational institutions as another solution of the critical language issue emerging in

<sup>2</sup> T. Halaichak, *Kulturne zhyttia v Ukraini. Zahidni zemli: dokumenty ta materialy* [Cultural life in Ukraine. Western territories: documents and materials], Kyiv, Naukova dumka, 1995 (in Ukrainian).

<sup>3</sup> V. Stynska, *Mistse ukrainskoi movy v navchalnyh planah halytskyh serednih sbkil kintsia XIX-pochatky XX<sup>th</sup>* [The role of Ukrainian language in the curriculum of Galicia middle schools at the end of the XIX<sup>th</sup>- beginning of the XX<sup>th</sup> centuries], Ivano-Frankivsk, Play, 2000 (in Ukrainian).

<sup>4</sup> J. Gruhala, *Rzad austriacki i polskie stromnictwa polityczne wobec kwestii ukrainskiej (1890-1914)* [Austrian government and Polish political parties' position concerning Ukraine], Katowice, 1988 (in Polish).

the Galician school system. In 1903, the first step was taken when the Rus Pedagogical Association, the first private woman's Ukrainian language school, was opened in Lviv. Ukrainian language use at the primary schooling level first occurred in parish schools, subsequently in folk schools, and, later, in mainstream elementary schools. However, in 1867 Polish became the compulsory language used in the Galician educational system. In the second half of the nineteenth century a new type of elementary bilingual school emerged, *utraquistic*, where main subjects were taught in Polish and the rest in Ukrainian. All elementary schools were divided into urban and rural, the latter being quite primitive, not allowing the further continuation of education. Secondary education was represented by classical gymnasiums with Polish being the language of instruction. The Ukrainian Church played an important role in diminishing German and Polish influence over Ukrainian schooling. Under its support, ABC books, primers, and catecheses were published. In the second half of the nineteenth century Ukrainian clergy were granted the right of supervision over schools. Imposing Polish education led to active actions by the clergy. Among their achievements was the opening of the Ukrainian language department in Lviv University (1851) and the Ukrainian history department (1898) headed by prominent historian Mykhailo Hrushevskyy. In 1908 Ukrainians opened 4 gymnasiums. Female education was represented by woman's gymnasiums and lyceums. At the beginning of the twentieth century a number of vocational schools (for future carpenters, builders, mechanics, coppersmiths, millers, etc.) emerged. The quality of instruction was enhanced, as well as the duration of training. Swift development of schooling required larger numbers of teachers. The government did not permit an increase in the number of schools for teachers, so, to compensate for this deficiency, it started hiring «stocking teachers» (young teachers who had very low level of qualification). However, this did not provide a reasonable solution to the problem so the government was forced to grant permission to open new schools.

In order to consolidate efforts in the struggle for Ukrainian language education, the Ukrainian State School Union<sup>5</sup> was created in 1910. It comprised representatives from such associations as *Prosvita*, Teachers Community, Taras Shevchenko Scientific Society and other educational and public organizations. In addition, cultural educational societies provided a great deal of assistance in the endeavor of educating Ukrainians. The most famous was the *Prosvita* society, established in 1868 in Lviv with numerous branches and libraries in the region. *Prosvita* started its work with publishing a Ukrainian primer. They published popular literature, school textbooks, scientific almanacs, as well as works of famous writers. The society comprised four subdivisions: publishing, library,

<sup>5</sup> N. Vynnyk, *Ukrainski hromadski orbanizatsii v suspilno-politychnomu zhytti Halychyny* [Ukrainian public organizations in the social and political life of Galicia at the end of the XIX<sup>th</sup> - beginning of the XX<sup>th</sup> centuries], Naukovi vyklady, 2007 (in Ukrainian).

schooling and literature. Beginning in 1905, branches of Prosvita were opened throughout Ukraine. Among its main tasks were: publishing books, magazines, and journals in Ukrainian; opening museums, bookshops, libraries; organizing public lectures, musical and literature events, concerts, plays, exhibitions, etc.; opening schools, educational institutions; granting scholarships; organizing competitions for the best essays.

Rus (later renamed the Ukrainian) Pedagogical Association<sup>6</sup> – the biggest and the most influential of such associations was, among its many tasks, responsible for creating private schools with the Ukrainian language being the primary language of instruction. A substantial number of such schools achieved the required level of teaching and gained the status of state schools. Another organization called Mutual Aid of Galician and Bukovyna Teachers focused mostly on moral and financial support of primary schools teachers. It was the only organization officially in opposition to the government educational policy. They succeeded in gaining pay raise for public teachers and opening new schools. The increasing number of teachers necessitated the unity into one organization that would be concerned with development of Ukrainian schooling. Teachers Community was created not only as another professional organization but also as a force capable of standing against the repression of Ukrainian secondary education. Another educational organization State School Council, coordinated activities of all educational organizations in the region and was a union of all concerned with the development of Ukrainian education, namely cultural and educational communities, political parties, parliament and Sejm representations. It provided substantial financial aid by soliciting and gathering voluntary contributions of money or other resources, requesting donations from individuals and businesses.

At the end of the nineteenth century reforms in schooling were complete and became an integral component of social policy in the region. In addition, they were multi-spectrum, providing reorganization of education management, creation of new types of educational institutions, modernization of curriculum. All branches of schooling were undergoing changes – from primary to higher education. However, compared with other regions of the Austro-Hungarian Empire, the educational level of Galicia was still quite low. Insufficient number of schools was a crucial problem – there was a single secondary school for population of 152,415, but the most critical was the situation with teacher's schools – one for population of 522,567 people. Before World War I Ukrainians had made some advancement in the educational sphere with 6 state Ukrainian gymnasiums and 2,510 folk schools with 440,000 students<sup>7</sup>. However, school councils of different levels paid less attention to the development of primary education, prioritizing Polish educational institutions.

<sup>6</sup> *Ibid.*

<sup>7</sup> V. Savchak, *Istoriia Ukrainської pedahohiky* [History of Ukrainian pedagogy], Kyiv, 1994 (in Ukrainian).

To be qualified as a teacher a Ukrainian would have to take a course in an ultraquint normal school (bilingual school). Starting from the «new era»<sup>8</sup> (1890-1894), Ukrainian ambassadors in Sejm consistently tried to prove the necessity for national educational institutions. However, these requests were frequently blocked by the Polish majority, although the funding for these schools was provided by the federal government, which was ready to allocate the funds.

Each ethnic group inhabiting Galicia at that time made efforts to promote its national education. In particular, the Polish Community of Folk Schools aimed at creating a system of Polish schooling to protect Polish children from denationalization in the western and eastern territories of the Austrian-Hungarian State and the Community of Private Female Gymnasiums founded and sponsored schools for females. German schooling in the region was started by German scholar Tsekler in order to establish comprehensive national education for the younger generation. At the same time the Union of Christian Germans assisted in providing education for the German minority<sup>9</sup>. They established private schools, and the German School Association (Deutscher Schulverein) organized learning German language at home. Jews were also preoccupied with their children's education. The Jewish Community of Folk and Secondary Schools founded public schools, started courses in Hebrew, Jewish History, and Literature. Fraternal Help financially supported pupils of middle schools and Ez Chaim promoted Jewish Bible among Semitic population. It should be stated that Jewish system of education included various aspects reflecting social, religious and national peculiarities of the community. That is why schools were divided into three different types – orthodox-religious (heders), Zionist and laic<sup>10</sup>.

The schooling system of Galicia encompassed different types of educational institutions organized into primary (folk schools), middle (real gymnasiums (specialized in science) and classical gymnasiums (specialized in humanities), lyceums, public schools, vocational schools (normal, industrial, trade, agronomic, career schools), higher (universities, academies, institutes), special (schools for blind, deaf-mute, mentally and physically challenged, uncared for children), preschool (kindergartens) and out of school educational facilities. The system of schooling showed upturn dynamics. In the period of 1900-1912 the number of state public schools rose by 1,594 (570 Ukrainian, 1,029 Polish, 5 German were closed). The report of State School Council shows that state system of schooling did not satisfy educational needs of all ethnic groups in

<sup>8</sup> O. Karamanov, *Rozvytok reformatorskykh idei osvity i vyhovannia v Halychyni napykintsi XIX- pochatku XX<sup>th</sup>* [Development of the education reform ideas in Galicia at the end of the XIX<sup>th</sup> – the beginning of the XX<sup>th</sup> centuries], Lviv, 2004 (in Ukrainian).

<sup>9</sup> T. Halaichak, *Kulturne zhyttia v Ukraini. Zahidni zemli: dokumenty ta materialy* [Cultural life in Ukraine. Western territories: documents and materials], Kyiv, Naukova dumka, 1995 (in Ukrainian).

<sup>10</sup> *Ibid.*

the region. That led to a start of social movement for establishment of private educational institutions.

Facts show that due to considerable revitalization of regional ethnic groups' activities the network of educational institutions was quite multi spectrum. However it should be mentioned that Polish and Germans were far better provided for in terms of education than Ukrainians.

The directive of the Regional School Council dated March 7<sup>th</sup>, 1893 divided primary schools into lower (in villages and small towns 1, 2, 3 and 4 classes) and higher (in towns and cities 5 and 6 classes, secondary – 6 and 7 classes) and caused curriculum diminution in favor of student hands-on training<sup>11</sup>. Only upon the graduation from a 4 class school one could enter public, secondary or vocational school. This meant loss of educational continuity in primary schooling and low level of training. Despite all the highlighted declarations, education was quite discriminative in nature. Although there was no official policy of directing the schooling system against Ukrainians the reality proved this very approach, as Polish, Germans and Jews inhabited predominantly cities whereas Ukrainians lived mostly in villages with 1, 2 or 3 class schools. Consequently, Ukrainians were losing the opportunity to receive secondary and higher education. Thereat formation of Ukrainian clerisy was jeopardized.

The next level in the system of schooling was formed by secondary educational institutions. Their designation was preparation of students for further knowledge acquisition in higher schools. The most popular were classical gymnasiums, as they granted the right to enter university. At the same time high fees made institutions, such as these, elite. Reforming secondary education at the beginning of the twentieth century was initiated in order to update curriculum so that it would meet contemporary requirements. Language policy was a cutting edge issue. Various conferences (May 20<sup>th</sup> 1909, November 21<sup>st</sup> 1909, May 30<sup>th</sup> 1910) were dedicated to problems of Ukrainian language teaching, adapting German curriculum for Ukrainian language teaching, classes of Ukrainian in Polish schools and vice versa. The conference of 1910 resulted in recommendations on learning Polish language in Ukrainian schools: making it compulsory, learning literature and grammar, familiarizing students with the works of seventeenth – eighteenth centuries writers, and public instruction of teaching Polish language. At the same time similar recommendations were made pertaining to learning Ukrainian language in Polish schools and also organizing two year preparatory course in Ukrainian language for those students who were transferred from the schools where Ukrainian was not taught, publishing course books for Polish schools including works of Ukrainian writers, and founding Ukrainian library. The Ukrainian language was not offered any priority, and attempts were made to grant it the same rights Polish language had. But those

<sup>11</sup> W. Szulakiewicz, *Historia oświaty i wychowania w Polsce* [History of education in Poland], Toruń, 2000 (in Polish).



attempts were not successful. Although the secondary education turned out to be in most favorable position at that time, it was difficult for the majority of population to access it.

Development of economics and social sphere which took place at the beginning of the twentieth century raised demands for professional cadre, which meant enhancement of competence, qualification, technological culture, workmanship. All that led to establishment of institutions that would provide training for professionals in various fields. Structure of career education can be evaluated as quite efficient; it included educational institutions of different types (industrial, trade, agricultural, schools for teachers) and encompassed the most important industries, fostered home crafts, and allowed young people to enter certain professions and find employment. Graduates of professional schools were often self employed and could implement skills obtained while training. Normal schools (for future teachers) being free of charge, were the most popular. Nevertheless, organization of career schools did not foster general continuity of education. Their ultimate purpose was providing professional training and did not allow for further education.

The upper branch of the schooling system was represented by post secondary educational institutions. Graduates of the middle schools could be admitted to the institutes and academies and only graduates of classical gymnasiums had right to enter universities. It is worth mentioning that all higher institutions in the region were Polish, except for the Musical Institute named after Lysenko and few Ukrainian departments in Lviv University<sup>12</sup>. Higher schools in Galicia underwent some progressive changes at the beginning of the twentieth century. Thus the improved system of student training and high qualification of faculty led to Polytechnic School and Veterinary Academy being granted the title of University (which instituted right to defend doctorate dissertations). Higher professional schools were streamlined into academies as they were not able to provide complete education.

Therefore, the conclusion can be drawn that at that period, generally, the schooling system in Galicia was improving. At the same time higher education stayed privileged, because of high fees, shortcomings of primary and professional branches, and other factors that interfered with continuance of education and had quite a negative effect on the general system of Galicia schooling of the end of the nineteenth – beginning of the twentieth centuries (only after a 4 class school students could continue their education, 1, 2, and 3 class schools were «deadlocked»). Secondary schools can be considered the most perspective institutions in the system of schooling. They provided access to further studies, but were rather high-priced, their curriculum was hardly coordinated with

<sup>12</sup> V. Stynska, *Merezha navchalno-vyhovnyh zakladiv Halychyny na pochatku XX<sup>th</sup>* [The network of educational institutions in Galicia at the beginning of the XX<sup>th</sup> century]. Ivano-Frankivsk, Play, 2000 (in Ukrainian).

structural elements and also there were some age requirements. Curriculums were constantly updated as standards of education provided by them didn't meet the requirements of that time. Single-discipline curriculums that ensured gaining specific professional skills required by subject matter experts were a characteristic feature of professional schooling. But in general the system of professional schooling in the framework of general system of education was «deadlocked».

The main tendencies of the Galicia education development were as follows: ascending dynamics of educational institutions (due to the Polish institutions for the most part), asserting all minorities' rights for mother tongue as language of instruction, efforts at structural consistency and gradual improvement. The state did not meet the requirements of different ethnic groups inhabiting the region. This has resulted in multiple efforts of various cultural, educational, religious organizations to establish network of privately owned educational institutions.

Analysis of that period's schooling system allows drawing conclusions about segregated access to education for representatives of different nationalities. Grounds for such conclusion being the authoritarian leadership of predominantly Polish Regional Council<sup>13</sup>, erratic funding for different ethnic groups, considerable number of school types (consequently – different level of proficiency upon graduation, differential access to further education), priority given to Polish institutions in the general system of education, existence of schools, *utraqvist* in form and Polish in content, implementation of Polish language and history into curriculum, limited coverage of languages, history and culture of other ethnical groups representatives, elitism of secondary and higher education.

Shortcomings of Galician education led to development of changes to the School Law of 1869, making provisions for a new concept of national schooling system. But the start of the World War I interfered with the plan. Once the territory of Ukraine was occupied by Russian troops, planned obliteration of Ukrainian institutions had started. All Ukrainian societies stopped their activity, publishing was suspended, «dangerous» and «suspicious» activists were arrested and sent to prisons in Russia. Ukrainian language was no longer used in government or schooling. Under new regulations, Russian was the language of instruction in schools. But, as there were no specialists who could teach in Russian, special courses were organized for future teachers.

<sup>13</sup> V. Kravets, *Istoriia Ukrainskoi shkoly ta pedahohiky* [History of Ukrainian School and pedagogy], Kyiv, 1994 (in Ukrainian).

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# Aprender a escribir para aprender a militar. Análisis de 18 dictados producidos por las Juventudes Socialistas Unificadas

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*Learn to write to learn how to be an activist. Analysis of 18 dictations produced by the  
Juventudes Socialistas Unificadas*

**ABSTRACT:** Among the numerous reforms made during the second Spanish Republic (1936-1939), Education system was, perhaps, what reflected in a better way the principles the new government wanted to spread. One of them was supporting cultural and educative politics that raised Spain to the level of other European countries. In this way, different initiatives were promoted in order to put an end to illiteracy, so they advocated for spreading education to reach every corner of the Spanish territory.

The military uprising led by general Francisco Franco on July 18<sup>th</sup>, 1936 could not stop the educative motivation of the Republic, but the war soon started to conditionate educative and cultural programs on both sides, putting political issues into every single detail. This article analyses 18 dictates written during the first years of the Spanish Civil War by the *Juventudes Socialistas Unificadas* (JSU), kept nowadays in the *Centro Documental de la Memoria Histórica* in Salamanca. These documents are the starting point to explore relevant facts about popular education during the Spanish Second Republic and how it was held during the war. Besides, a linguistic and graphic analysis helps us to go into detail about the study of the writings made by ordinary people, which provides a deeper approach to the writing practices in fields sometimes forgotten by traditional historiography.

**EET/TEE KEYWORDS:** National education system; Popular Education; Spanish Civil War; XX<sup>th</sup> Century.

La ciento cuarenta y cuatro brigada, eran, en su inmensa mayoría, campesinos aragoneses y de algunos lugares de Cataluña también y, luego extremeños, y la mayor parte de ellos eran analfabetos funcionales y algunos eran analfabetos totales [...]. Teníamos un miliciano de la cultura en cada compañía [...]. Y esos tenían la tarea de alfabetizar a la gente que deseen. Entonces, eh... en mitad de esos bochinchos espantosos y de bombardeos y demás, y piojos y todo eso, ahí tenía siempre gente con su pedazo de lápiz y un cuaderno [...] tratando de aprender a escribir<sup>1</sup>.

Ángel Palerm Vich, a quien pertenecen las palabras que acaban de ser reproducidas, participó activamente en la Guerra Civil española junto al ejército republicano. Tras la derrota del mismo se vio obligado a cruzar los Pirineos compartiendo su destino con el de miles de españoles que corrieron la misma suerte. Después de su paso por los campos de concentración de Saint-Cyprien y Barcarès consiguió embarcar en uno de los buques que trasladaban a los refugiados españoles a México, allí finalmente comenzó su nueva vida. En este testimonio narra sus recuerdos de la guerra destacando, de forma especial, la labor realizada por los milicianos de la cultura quiénes entre tanta miseria y destrucción se esforzaron por luchar contra el analfabetismo incluso dentro de las propias trincheras.

Esta lucha no es de extrañar si tenemos en cuenta que en el año 1930 había en España 5,871,403 analfabetos, lo que suponía un 32% de la población, de este porcentaje el 64% eran mujeres y el 36% varones<sup>2</sup>. Combatir estas cifras fue uno de los propósitos de la II República española. Interés que continuó durante el desarrollo de la Guerra Civil, ya que desde ambos bandos se puso especial atención en formar a los soldados. El aprendizaje de las primeras letras era totalmente necesario en un momento en el que la comunicación de éstos con sus familiares dependía de las cartas que escribían desde el Frente a sus lugares de origen<sup>3</sup>; pero también, la educación de las milicias fue utilizada como un arma propagandística a través de la cual se introducían las principales consignas de los partidos políticos. Estas medidas no sólo se quedaron en el campo de

<sup>1</sup> Entrevista realizada a Ángel Palerm Vich en México DF entre marzo y agosto del año 1979. Archivo de la Palabra. INAH y MCU PHO/10/13. Consultada la versión transcrita conservada en el Centro Documental de la Memoria Histórica (CDMH), Libro 81-1-2, pp. 148-149.

<sup>2</sup> M. Vilanova Ribas, X. Moreno Julià, *Atlas de la evolución del analfabetismo en España de 1887 a 1981*, Madrid, Centro de publicaciones del Ministerio de Educación y Ciencia, 1992, p. 289.

<sup>3</sup> Uno de los principales objetivos de la alfabetización de los soldados era que aprendieran a escribir sus propias cartas. Cuando el soldado ya era capaz de realizar este ejercicio debía realizar lo que la profesora Verónica Sierra Blas denomina el *bautizo epistolar*, es decir, tenían que inaugurar su correspondencia enviando una carta a Dolores Ibárruri, la Pasionaria, o a Jesús Hernández (Ministro de Cultura en ese momento) para informarles de lo que habían aprendido y darles las gracias por el interés que tenían en la alfabetización de los soldados. See V. Sierra Blas, *Escribir en campaña. Cartas de soldados desde el frente*, «Cultura Escrita & Sociedad», vol. 4, 2007, pp. 95-116.

batalla, la retaguardia fue también testigo del nacimiento de escuelas y lugares en los que la población civil podía adquirir los conocimientos necesarios para saber defenderse con un lápiz y un papel.

Es en este contexto en el que se sitúa la documentación analizada en el presente artículo<sup>4</sup>. Se trata de dieciocho dictados conservados en el Centro Documental de la Memoria Histórica de Salamanca (CDMH)<sup>5</sup>. Estos documentos muestran el ejercicio escolar del dictado, concretamente se trata de tres textos diferentes que fueron dictados a los alumnos quienes los realizaron con mayor o peor corrección. La temática de los mismos está altamente politizada, algo normal si tenemos en cuenta que su procedencia es de las Juventudes Socialistas Unificadas de Santander y que por sus características podemos fecharlos entre el año 1936-1937 preludio e inicio de la Guerra Civil y momento, por tanto, en el que las consignas políticas empezaban a formar parte del acervo diario de escuelas, universidades y de la vida cotidiana de los ciudadanos de a pie.

Los dictados se han conservado como consecuencia del interés que despertaban estos documentos que podían ser usados como pruebas recriminatorias para fines represivos, como se detallará más adelante. Nos muestran las diferentes capacidades gráficas de sus autores que son en total 16, de los cuales 3 son mujeres. Gracias a su análisis pormenorizado podemos obtener valiosa información sobre cómo se desarrollaban las prácticas de escritura dentro de un contexto pre-bélico o bélico, los usos que les daban a las mismas y la relación que existía entre el individuo y la escritura. Indagar en estos aspectos es uno de nuestros objetivos principales y para ello hemos dividido el artículo en dos grandes bloques.

En primer lugar, nos aproximaremos al tipo de centro en el que fueron realizados estos dictados. Sus características, composición y temática, nos indican que fueron utilizados para la educación de adultos. Por este motivo, indagaremos en las prácticas de educación popular que se llevaron a cabo durante la II República, atendiendo a las distintas experiencias educativas, al por qué se realizaban y a los fines que perseguían. Además, haremos un breve recorrido sobre tres de las acciones más importantes llevadas a cabo por la República para conseguir este fin: la creación de las Misiones Pedagógicas, el auge de las Casas del Pueblo y el proceso de socialización del libro y de la lectura con la aparición de numerosas bibliotecas públicas y populares. Finalmente, ya que tenemos la suerte de conocer la organización dentro de la cual fueron producidos estos ejercicios, se realizará un repaso a la acción educativa llevada

<sup>4</sup> Este trabajo se enmarca en el Proyecto *Cultura escrita y memoria popular: Tipologías, funciones y políticas de conservación* (Ref. HAR2011-25944). Quiero agradecer a A. Castillo Gómez y V. Sierra Blas sus apreciaciones e indicaciones que han servido para enriquecer el presente estudio.

<sup>5</sup> CDMH, Fondo Político-Social, Santander, Serie D, JSU de Santander. Federación Provincial Montañesa. Caja 26, expediente 5, documentos de 1 a 18. (Para citar los dictados se abreviará de la siguiente forma: CDMH. Fondo PS, Santander, serie D, 26/5, n° doc.).

a cabo por las Juventudes Socialistas Unificadas (JSU) relacionando las mismas con el contenido de los propios dictados.

En segundo lugar, se descenderá al propio análisis de los dictados comenzando por explicar la incidencia de esta práctica en escuelas y aulas. Tras esto, se abordarán aspectos como la materialidad, las características gráficas y lingüísticas de los mismos. Este apartado resulta revelador puesto que tanto en la Historia de la Educación como en la Historia de la Cultura Escrita, disciplina dentro de la cual se enmarca este trabajo, no se han realizado estudios suficientes sobre esta tipología, algo que puede resultar muy interesante puesto que no sólo nos habla de los diferentes grados de alfabetismo de sus autores sino que también nos muestra como se produce el proceso de aprendizaje de la escritura. A través del estudio de estos dictados podemos saber cuáles eran los problemas lingüísticos y gráficos más usuales, a la vez que podemos averiguar qué instrumentos de escritura eran los más adecuados para iniciarse en el mundo de lo escrito. También, prestaremos atención a la historia de su producción, a sus características formales, así como al uso social que se dio a la escritura durante dicho periodo<sup>6</sup>.

## 1. *Dos objetivos: la educación popular y la formación política*

### 1.1. *La educación popular*

El interés que puso la II República en la educación popular es algo que ya ha sido mencionado anteriormente y a lo que se han dedicado muchas páginas de nuestra historiografía. Por tanto, en este breve apartado tan sólo destacaremos algunas de las medidas más significativas llevadas a cabo por el gobierno republicano para conseguir tal fin, concretamente tres: las Misiones Pedagógicas, la revalorización de las Casas del Pueblo y el proceso de socialización del libro. Todas fueron impulsadas en la primera etapa de la política educativa de la II República, la que ha sido denominada como: Bienio azañista (1931-1933), periodo que se caracterizó por llevar a cabo la mayor parte de las reformas<sup>7</sup>.

La creación de las Misiones Pedagógicas supuso un importante estímulo para la educación popular española, sobre todo para acercar la cultura a los ámbitos rurales dónde se encontraban los índices más altos de analfabetismo. Procuraban fomentar la cultura general creando bibliotecas populares y organizando distintas actividades de índole cultural que llamaran la atención

<sup>6</sup> A. Petrucci, *La ciencia de la escritura. Primera lección de Paleografía*, Buenos Aires, Fondo de Cultura Económica, 2002, pp. 7-8.

<sup>7</sup> A. Viñao Frago, *Escuela para todos. Educación y modernidad en la España del siglo XX*, Madrid, Marcial Pons Historia, 2004, pp. 36-38.



de la gente más humilde. Además llevaron a cabo una importante labor de orientación pedagógica en los pueblos que visitaban para lo que iban a las escuelas de los mismos y realizaban cursillos de perfeccionamiento para maestros. Todo esto lo realizaban sin olvidar su fin principal que no era otro sino formar ciudadanos dentro de los principios democráticos<sup>8</sup>. El inicio de la Guerra Civil frenó la labor que venían realizando las Misiones. A principios del año 1937 el Comité Nacional Provisional de Cultura Popular fue sustituido por las Milicias de la Cultura que continuaron la lucha contra el analfabetismo tanto en el campo de batalla como en la retaguardia<sup>9</sup>.

Otro intento para acercar la cultura a los sectores populares de la sociedad española fue la revalorización de las Casas del Pueblo, que actuaron como agentes socializadores sirviendo como lugar de encuentro social y esparcimiento. Estos «templos de la clase obrera» se convirtieron en focos de formación y concienciación política. Además, tenían una clara preocupación cultural, destinada a combatir la ignorancia entre los trabajadores. La mayoría ofrecía numerosos servicios a sus asociados: practicar algún deporte, servicio de economato, cooperativas, farmacias, mutuas, consultorios médicos y dispensarios para aquellos que no podían acceder a los organismos privados<sup>10</sup>.

Definitivamente, tanto las Casas del Pueblo como los Centros Obreros fueron una forma más de extensión informal de la educación, haciéndola llegar a aquellos que quizás no podían acceder a ella de otra forma. Para esto fueron decisivas las bibliotecas que poseían y ponían al disfrute de todos los trabajadores, algunas, como la de la Casa del Pueblo de Madrid, contaba con un servicio de préstamo circulante por el que los lectores interesados podían llevarse los libros a su casa y disfrutarlos en los escasos ratos de ocio. Éstas bibliotecas poseían también una hemeroteca que era muy frecuentada por los socios<sup>11</sup>.

Este último servicio de las Casas del Pueblo nos hace hilar con otro de los objetivos perseguidos por la II República dentro de su paquete de reformas educativas: la socialización del libro. Para ello se crearon numerosas bibliotecas públicas: desde las ya mencionadas de las Misiones Pedagógicas o de las Casas del Pueblo, hasta las itinerantes. Podemos afirmar que existió una verdadera obsesión por acercar el libro al ciudadano de a pie<sup>12</sup>. Con el propósito de

<sup>8</sup> E. Otero Urtaza, *Las Misiones Pedagógicas. 1931-1936. Catálogo de la Exposición de las Misiones Pedagógicas*, Madrid, Residencia de Estudiantes. Sociedad Estatal de Conmemoraciones Culturales, 2006, pp. 81-82.

<sup>9</sup> Otero Urtaza, *Las Misiones Pedagógicas. 1931-1936. Catálogo de la Exposición de las Misiones Pedagógicas*, cit., p. 103.

<sup>10</sup> F. de Luis Martín, L. Arias González, *Las Casas del Pueblo socialistas en España (1900-1936)*, Barcelona, Ariel Historia, 1997, pp. 39-74.

<sup>11</sup> N. Franco Fernández, *Catálogo de la biblioteca de la Casa del Pueblo de Madrid (1908-1939)*, Madrid, Consejería de Educación y Cultura, 1998, pp. 31-35.

<sup>12</sup> Para más información sobre la preocupación de la II República por acercar el libro y la cultura a los sectores populares véase L. García Ejarque, *Historia de la lectura pública en España*,

conseguir este objetivo se creó la Junta de Intercambio y de Adquisición de Libros (21 de noviembre de 1931), que se ocupaba de ver dónde se necesitaban los libros y qué fondos se debían ampliar. Además aparecieron nuevas editoriales, unidas a la multiplicación de colecciones populares que dieron lugar a las conocidas como «ediciones baratas» accesibles hasta para los bolsillos más modestos. Otros acontecimientos importantes fueron el inicio de la Feria del libro de Madrid (23-29 de abril de 1933)<sup>13</sup>, en un intento de conjugar lectura y ocio, ofreciendo al público las últimas novedades editoriales más baratas y los recorridos realizados por el camión-librería de la Agrupación de Editores Españoles, que visitó muchos pueblos acercando la cultura al pueblo de forma similar a lo que hicieron las Misiones Pedagógicas<sup>14</sup>.

El propósito era llevar la educación y la cultura a todos los rincones de España con el objetivo último de crear ciudadanos, no súbditos, y de construir la nueva democracia por medio de la educación<sup>15</sup>. Para conseguir este proyecto se crearon 7,000 nuevas plazas de maestro y se revalorizó la figura del maestro rural. Además, se realizaron numerosas campañas de alfabetización y se reforzó la educación de adultos, calificándola como enseñanza post-escolar con la triple finalidad de ofrecer una formación básica, permanente y profesional<sup>16</sup>.

Hasta este momento hemos destacado los paquetes de reformas llevados a cabo por el Estado. Pero, no debemos olvidar, que los proyectos de educación popular también se propulsaron desde organizaciones privadas, de hecho en la propia definición del término que ofrecen algunos estudiosos se especifica que ésta debe estar dentro de la iniciativa privada. Así Alejandro Tiana Ferrer denomina educación popular a «todas aquellas actuaciones emprendidas por iniciativa privada que tienden a mejorar la formación individual y colectiva de las clases inferiores de la sociedad, sea en su primera edad o en la adulta, con vistas a su alfabetización, a su capacitación profesional o al aumento de su cultura general»<sup>17</sup>.

Gijón, Trea, 2000, pp. 184-214.

<sup>13</sup> Sobre la Feria del libro en Madrid remito a F. Cendán Pazos, *Historia de la Feria del libro de Madrid (1933-1986)*, Madrid, Cámara de Comercio e Industria de Madrid, 1987, pp. 7-16.

<sup>14</sup> Estos datos han sido extraídos de A. Martínez Rus, *La política del libro y las ferias del libro de Madrid (1901-1936)*, «Cuadernos de Historia Contemporánea», vol. 25, 2003, pp. 226 y ss.; y, de la misma autora, *La política del libro durante la II República: socialización de la lectura*, Gijón, Trea, 2003, pp. 21 y ss.

<sup>15</sup> Ana Martínez Rus, *La política del libro y las ferias del libro de Madrid (1901-1936)*, cit., pp. 25-26. Para conocer la evolución posterior de la política del libro durante el Franquismo véase A. Martínez Rus, *La persecución del libro. Hogueras, infiernos y buenas lecturas (1936-1951)*, Gijón, Trea, 2014.

<sup>16</sup> P.L. Moreno Martínez, *Educación Popular en la II República española. Carmen Conde, Antonio Oliver y la universidad popular de Cartagena*, Madrid, Biblioteca Nueva Cartagena, Universidad Popular de Cartagena, 2009, pp. 25-28.

<sup>17</sup> Definición recogida en J.M. Hernández Díaz, F. de Luís Martín, *La escuela y la educación popular en la España de principios del siglo XX*, Madrid, Comisaría de España, Expo Lisboa '98, 1998, p. 246.

Siguiendo a José María Hernández Díaz y Francisco de Luís Martín destacamos tres de las corrientes de la educación popular. La primera es la reformista social, que fue llevada a cabo por los sectores liberales reformistas; la segunda, la católica social, realizada por los grupos católicos que se separaban del integrismo, como por ejemplo determinadas órdenes que estaban especialmente vinculadas a la educación (escolapios, hermanos de las escuelas cristianas) y círculos católicos de obreros (todo ello promovido a través de la Encíclica *Rerum Novarum* de Leon XIII, 1891); la tercera y última, la ligada al movimiento obrero y la educación militante<sup>18</sup>. Es ésta última la que más nos interesa puesto que los dictados analizados son fruto de la misma.

El proyecto educativo socialista y el anarquista fueron muy similares: educación para adultos, red de centros de formación profesional, educación de los hijos de los trabajadores socialistas (centros de obreros y Casas del Pueblo), experiencias en el ámbito cultural y artístico, bibliotecas, etc.<sup>19</sup> Hacer un balance de lo que realizaron ambos se saldría de los parámetros que nos hemos fijado para este trabajo, pero sí queremos destacar la labor que hicieron las Juventudes Socialistas Unificadas (JSU) desde su creación en marzo de 1936, fruto de la fusión entre la Unión de las Juventudes Comunistas Españolas (UJCE) y las Juventudes Socialistas (JJSS). Esta unidad vino precedida por el esfuerzo de muchos teóricos marxistas que incidieron sobre la necesidad de esa coalición, como por ejemplo Jorge Dimitrov<sup>20</sup>, quien defendió esta idea en el Congreso de la Internacional Comunista celebrado del 25 de julio al 21 de agosto de 1935 en Moscú<sup>21</sup>.

Dentro de los distintos propósitos que perseguía dicha organización estaba el interés puesto en «la educación y la cultura, entendidas como formación política y capacitación técnica y militar»<sup>22</sup> y desempeñadas como tareas revolucionarias. La acción formativa que llevaron a cabo se desarrolló en numerosos lugares: el ejército, las ciudades y el campo fueron testigos de la misma. Empezaremos por el ejército, dentro del mismo hubo dos instancias fundamentales que funcionaron durante la Guerra: los Clubes de educación y los Hogares del soldado. Uno de

<sup>18</sup> Hernández Díaz, de Luís Martín, *La escuela y la educación popular en la España de principios del siglo XX*, cit., pp. 247-262.

<sup>19</sup> *Ibid.*

<sup>20</sup> Jorge Dimitrov (1882-1949) fue un importante líder del Partido Comunista de Bulgaria, desempeñó el cargo de Secretario General de la Internacional Comunista desde 1935 a 1943, así como fue miembro del soviét supremo (1937-1945). Además fue jefe de gobierno de la República Popular Búlgara (1946-1949). Para más información véase J. Dimitrov, *Obras escogidas*, Madrid, Akal, 1977.

<sup>21</sup> J.M. Fernández Soria, *Juventud, ideología y educación. El compromiso educativo de las Juventudes Socialistas Unificadas*, Valencia, Universidad de Valencia, 1992, p. 13. Para ampliar la información sobre el proceso de unificación remito a A. Elorza, M. Bizcarrondo, *Queridos Camaradas. La Internacional Comunista y España. 1919-1939*, Barcelona, Planeta, 1999, pp. 270-279.

<sup>22</sup> Fernández Soria, *Juventud, ideología y educación. El compromiso educativo de las Juventudes Socialistas Unificadas*, cit., p. 100.

sus objetivos principales era la eliminación del analfabetismo (de ahí lemas tan conocidos como el famoso: «Ni un solo analfabeto en la J.S.U»), pues ésta era una idea base de su programa político, pensaban que liquidando el analfabetismo y elevando el nivel cultural de los soldados éstos entenderían mejor las razones de la guerra y de esta forma tendrían más claros sus deberes dentro de la misma<sup>23</sup>.

En el ámbito urbano, las JSU tuvieron mucha relevancia sobre todo en los círculos en torno a las fábricas. Quisieron llevar a las mismas numerosas actividades culturales y propagandísticas. En su labor educativa también quisieron erradicar el analfabetismo en el campo y, de este modo, intentar que sus ideas políticas llegaran a los campesinos. Las instituciones que tuvieron más importancia en este contexto fueron las Casas de la Juventud Campesina. El frente, el campo y la ciudad...Cualquier escenario era válido para acercarse a la juventud, ofrecerle cultura, libros, conocimiento, ideas. Si bien es cierto que aprovechaban esta aproximación para inculcar sus ideas políticas, no lo es menos que la labor educativa que realizaron fue meritoria<sup>24</sup>. De dicha labor se beneficiaron los 16 autores de los dictados que analizaremos a continuación.

### 1.2. *La formación política: El contenido de los dictados*

Sí observamos la temática que siguen los dictados analizados vemos como tratan principalmente de reivindicaciones políticas, hazañas de grandes personajes del partido y consignas generales del mismo. Esto nos indica la clara intención de adoctrinamiento por parte de estas escuelas, algo que es normal puesto que son enseñanzas que parten del propio partido y, por tanto, tratan de educar dentro de los valores defendidos por el mismo. En los tres ejercicios se nos muestran consignas claves de las JSU, lemas que interesaba que los jóvenes conocieran y qué mejor forma de enseñarles a leer y a escribir que valiéndose de textos que a la vez les servían como ejemplo de comportamiento y de moral socialista.

Los dictados contienen tres textos diferentes. El primero de ellos nos habla de uno de los grandes personajes del comunismo, que ya ha sido citado, Jorge Dimitrov, el ideólogo que insistió en la fundación de las JSU. La organización no olvidó esta hazaña y por ello se esforzaban en que los jóvenes supieran de su existencia y de la importancia que había tenido. Aunque muchos no supieran escribir bien su nombre sí que copiaron y aprendieron los lemas que figuraban en torno a su persona: «El camarada Jorge Dimitrof [sic], el glorioso timonel de la I.C., indica a toda la humanidad el camino para librarse del fascismo, de la

<sup>23</sup> *Ibid.*, p. 128.

<sup>24</sup> J.M. Fernández Soria, *Educación, socialización y legitimación política. España 1937-1970*, Valencia, Tirant lo Blanch, 1998, pp. 53 y ss.

guerra, del hambre y de la miseria»<sup>25</sup>. En total hay 11 ejercicios que reproducen este texto.

El segundo nos muestra otro de los lemas principales de la JSU para conseguir adeptos: su preocupación por los problemas juveniles pues pensaban que era su obligación conocerlos para poder saber cómo llegar hasta ellos y obtener un número mayor de militantes. Es curioso que en este dictado se introduce y recomienda la lectura de una obra que, por la referencia que da, puede ser el informe que presentó Jorge Dimitrov ante el VII Congreso Mundial de la Internacional Comunista<sup>26</sup>, celebrado el 2 de agosto de 1935, en dicho informe hablaba de cuáles eran las medidas que debía adoptar la clase trabajadora para plantarle cara al fascismo y, como decía anteriormente fue el inicio de las JSU: «Tan solo nos guía el propósito de ensalzar entre los jóvenes una publicación que por su contenido merece ser estimada y estudiada. Estimada porque su contenido hizo posible en nuestro país la unificación de jóvenes comunistas y socialistas»<sup>27</sup>. Son dos los dictados que aparecen con este texto.

El último ejercicio, copiado en cinco ocasiones, también comparte estas consignas. Se trata de un texto que relata la experiencia de un joven que se ha quedado sin trabajo por cumplir el servicio militar. En él aparecen de nuevo las ideas del partido, además de una dura crítica al fascismo: «Así es el fascismo. Al obrero parado le promete trabajo; al joven campesino la tierra, a la muchacha, una vida y un hogar feliz. A todos promete felicidad pero el fascismo no da más que hambre, miseria y guerra»<sup>28</sup>.

En los tres modelos hemos observado cómo la temática está fuertemente influida por la doctrina política. Algo que también sucedió en las cartillas de caligrafía escolares que surgieron durante el desarrollo de la contienda. Ejemplos de ello fueron: la *Cartilla escolar antifascista* y la edición del manual *El niño republicano* de 1932, escrito por Joaquín Seró Sabaté<sup>29</sup>. En la primera combinaban ejercicios de copia, con pequeñas frases que contenían sentencias políticas, y, finalmente, se añadía una ilustración que mostraba los valores republicanos y lanzaba mensajes propios de tiempos de guerra. El método de aprendizaje llevado a cabo era muy similar al de los dictados elaborados por las JSU, consistía en utilizar los textos con dos finalidades claras: la primera era la enseñanza de primeras letras a los soldados y a la población que se encontraba

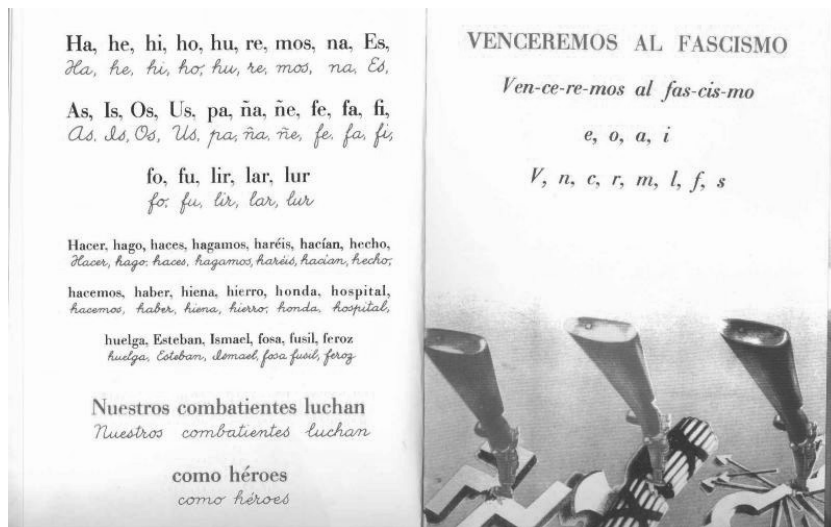
<sup>25</sup> CDMH, Fondo PS, Santander, serie D, 26/5 n° 10.

<sup>26</sup> J. Dimitrov, *La ofensiva del fascismo y las tareas de la Internacional en la lucha por la unidad de la clase obrera contra el fascismo*, en J. Dimitrov, *Obras Completas*, Editorial del PCB, 1954. Recurso digital: Marxist Internet archive, 2001, <<http://www.marxists.org/espanol/dimitrov/1935.htm>> (último acceso: 1 de octubre de 2014).

<sup>27</sup> CDMH, Fondo PS, Santander, serie D, 26/5 n° 11.

<sup>28</sup> CDMH. Fondo PS, Santander, serie D, 26/5 n° 4. En esta cita y en la anterior han sido corregidas las faltas de ortografía que presentaba el original.

<sup>29</sup> Datos e imagen extraídos de la Biblioteca virtual MANES (último acceso: 7 de octubre de 2014) <[http://www.uned.es/manesvirtual/BibliotecaManes/EscritLec/Esc1931\\_39/CarAnt/CarAntAA.htm](http://www.uned.es/manesvirtual/BibliotecaManes/EscritLec/Esc1931_39/CarAnt/CarAntAA.htm)>.



Pic. 1. Cartilla escolar antifascista [MANES-UNED].

en la retaguardia; la segunda, era usar para esa enseñanza textos con consignas políticas, ya que para aprender las normas ortográficas o la caligrafía debían copiar varias veces estos textos y de esta forma interiorizaban estas consignas que quedaban grabadas en su memoria. De esta forma no sólo les instruían en las primeras letras sino que también formaban su conciencia política (Pic. 1).

Sucede algo similar con el resto de publicaciones que se utilizaron para la enseñanza de primeras letras durante el desarrollo de la contienda, tales como: *Ni un solo analfabeto en el Ejército Popular*, la *Cartilla del combatiente* del Socorro Rojo Internacional o la titulada *Clases de analfabetos. Algunas orientaciones metodológicas*. De igual forma también podemos observar este afán adoctrinador en los manuales epistolares que se realizaron específicamente para los soldados que estaban en el frente. Estos manuales ofrecían consejos y modelos de cartas que los combatientes usaban para la redacción de su correspondencia, todos estaban impregnados de consignas políticas. Algunos de ellos fueron: *El perfecto Manual del Soldado (Modelos para escribir cartas)*, *Epistolario del frente: Espíritu de los soldados de Cristo y España...*<sup>30</sup>.

Así pues, la educación popular que ya había adquirido una importancia relevante durante la II República, continuó durante los años de la Guerra Civil.

<sup>30</sup> A. Castillo Gómez, V. Sierra Blas, *Si mi pluma valiera tu pistola. Adquisición y usos de la escritura en los frentes republicanos durante la Guerra Civil española*, «Ayer», vol. 67, n. 1, 2007, pp. 188-189. Para más información sobre los manuales epistolares para soldados remito a V. Sierra Blas, *La guerra en el tintero. Manuales epistolares para soldados*, «Pliegos de Bibliofilia», vol. 21, 2003, pp. 15-38.

Son muchos los méritos que debemos reconocer a la política republicana en lo referente a la educación: dotó a la cultura de un carácter popular, concibió la educación como un derecho humano y social, democratizó la enseñanza y los bienes culturales. Pero no debemos olvidar que todo este programa estaba vinculado también a una estrategia de adoctrinamiento ideológico. Son muchos los autores que nos hablan de esta politización de la enseñanza (que será aun mayor durante la contienda bélica). Así, Juan Manuel Fernández Soria entiende la educación como un instrumento político, como un medio para asentar la democracia recién conquistada<sup>31</sup>. Mientras que la profesora Verónica Sierra Blas afirma que la guerra inundó cada espacio escolar, tanto los físicos (aulas, maestros en el frente y represaliados, muros llenos de mapas con el desarrollo de la contienda...) como los propios contenidos de las lecciones escolares, las actividades y los materiales del aula<sup>32</sup>.

Tal y como hemos visto con los dictados producidos dentro de las JSU o la cartilla antifascista, durante el desarrollo del conflicto la educación fue entendida como un arma más para luchar contra el enemigo. Podemos decir que la enseñanza se convirtió en un instrumento ideológico, adquiriendo un carácter revolucionario<sup>33</sup>. Esto estuvo más acentuado dentro de los propios partidos políticos, como socialistas y anarquistas, que pensaban que para el triunfo de sus ideas era necesaria la educación del proletariado<sup>34</sup>. Así lo demuestra el cartel que se reproduce a continuación, realizado por Babiano para las JSU, y que contiene un mensaje claro: «Las escuelas de guerra abren



Pic. 2. Cartel realizado por Babiano para las JSU. Sin fecha [Fundación Pablo Iglesias, Alcalá de Henares, Madrid].

<sup>31</sup> Fernández Soria, *Educación, socialización y legitimación política. España 1937-1970*, cit., p. 24.

<sup>32</sup> V. Sierra Blas, *Palabras Huérfanas. Los niños y la Guerra Civil*, Madrid, Taurus, 2009, pp. 51-57.

<sup>33</sup> M. de Puelles Benítez, *Educación e ideología en la España Contemporánea*, Madrid, Tecnos, 1999, p. 290. El autor al realizar esta afirmación recomienda la lectura del trabajo de M. Vázquez, *La reforma educativa en la zona republicana durante la guerra civil*, «Revista de Educación», vol. 240, n. 1, pp. 60-72.

<sup>34</sup> J. M. Hernández Díaz, F. de Luís Martín, *La escuela y la educación popular en la España de principios del siglo XX*, Madrid, Comisaría de España, Expo Lisboa '98, 1998, p. 258.

paso a la juventud combatiente para puestos más decisivos» (Pic. 2)<sup>35</sup>. Sentencia que confirma que en tiempos de guerra, la educación, la enseñanza, la cultura se hicieron beligerantes<sup>36</sup>.

## 2. Análisis de los dictados: un ejemplo de escritura popular

### 2.1. Descripción del fondo

Como ya se ha dicho anteriormente el fondo para este trabajo son 18 dictados custodiados en el CDMH, concretamente en la sección Político-Social de Santander. El único dato que se conserva junto a la documentación es la procedencia del mismo: la Federación Provincial Montañesa, perteneciente a las JSU de Santander. El motivo por el que estos documentos se encuentran en dicho centro no es otro que la incautación de los mismos tras la toma de Santander (26 de agosto de 1937) por parte de los «equipos de recuperación de documentos» del ejército franquista quienes se encargaban de identificar, recoger y enviar a la Oficina de Investigación y Propaganda Anticomunista (OIPA) toda aquella documentación que pudiera ser utilizada en el futuro con fines represivos. Por ello no es de extrañar que cuando éstos se encontraron decidieran su conservación, puesto que, aunque tan sólo se tratara de meros ejercicios escolares, podían convertirse en pruebas de adhesión a las ideas comunistas y socialistas de sus autores<sup>37</sup>. Sobre éstos es poco lo que podemos decir ya que ninguna de las búsquedas realizadas nos han permitido conocer más sobre su origen, su procedencia o su relación con las JSU. Tan sólo conservamos sus nombres, que reproduzco a continuación según el orden de aparición: Cirilo Huertas, ¿Elias? Alisal López, Aurelio Andreu, Teodoro Arbelaz Iraola,

<sup>35</sup> Cartel realizado por Babiano para las JSU, sin fecha. Fundación Pablo Iglesias, Alcalá de Henares, Madrid. Ref. R1278.

<sup>36</sup> Fernández Soria, *Educación, socialización y legitimación política. España 1937-1970*, cit., p. 96.

<sup>37</sup> Nos resulta imposible reconstruir la azarosa e interesante historia de estos documentos y de lo que hoy es el Centro Documental de la Memoria Histórica, anterior sección Guerra Civil del Archivo Histórico Nacional. Para más información remitimos a J. Cruanyes, *El papers de Salamanca. L'espolió del patrimoni documental de Catalunya*, Barcelona, Edicions 62, 2003, pp. 15-65 y S. Michonneau, *Les papiers de la guerre, la guerre des papiers. L'affaire des archives de Salamanca*, en P. Artières, A. Arnaud (coord.), *Lieux d'archive. Une nouvelle cartographie de la maison au musée*, dossier monográfico de la revista «Sociétés et Représentations», vol. 19, 2005, pp. 250-270. Sobre el archivo véase J. García Quirón, *La Guerra Civil Española: fuentes (Archivos, bibliografía y filmografía)*, Barcelona, Crítica, 1985, pp. 116-120 y A. González Quintana, *Fuentes para el estudio de la represión franquista en el Archivo Histórico Nacional, sección Guerra Civil*, «Espacio, Tiempo y Forma, Serie V, Hª Contemporánea», vol. 7, 1994, pp. 479-508.



Encarnación Asensio, José Barril Blanco, León Fernández, R. Fernández, Domingo González, Consuelo Herranz, J.M. López, Fernando Manzanares, Marcelino Orio, Pilar Oviedo, José Palacios y Ángel Rejario<sup>38</sup>. Los documentos nos muestran los diferentes niveles de competencia gráfica, algo típico al tratarse de personas que están aprendiendo a escribir. Por ello podemos encontrar desde dictados con numerosos errores lingüísticos y ortográficos que presentan una grafía irregular propia de la escritura popular, hasta ejercicios realizados por personas que ya tienen un dominio de la escritura y se enfrentan al dictado sin el menor problema.

## 2.2. *El dictado como ejercicio escolar*

Antes de continuar con el análisis de los ejercicios creo preciso abordar algunos aspectos claves sobre la utilización de los dictados en las aulas, puesto que éste ha sido una de las actividades escolares por excelencia<sup>39</sup>. Los maestros lo empleaban para mejorar la práctica de la escritura de los alumnos, así como para obligarles a que adquirieran unas reglas ortográficas y gramaticales. Pero no debemos olvidar que en ellos siempre había un contenido de fondo, que los maestros aprovechaban para profundizar sobre las lecciones impartidas, sobre conceptos nuevos o incluso para introducir valores o ideas.

El dictado, tal y como lo conocemos hoy en día, arranca con las reformas educativas del siglo XIX. En ese momento se impone una nueva forma de enseñar basada en la lecto-escritura. Aunque todavía se concebían de forma independiente, se intentaba relacionar ambas capacidades, buscando una forma más rápida de aprendizaje y fomentando una escritura más simplificada, con un trazo más personal. En este proceso de cambio comenzaron a incluirse como ejercicio clave los dictados: «La escuela ampliaba la noción de aprendizaje hasta incluir en ella progresivamente [...], el dictado e imposición de las normas ortográficas, la correspondencia epistolar y, con el tiempo, incluso la redacción o el breve texto libre»<sup>40</sup>.

La importancia otorgada al dictado no quiere decir que no hubiera otras actividades para reforzar y adquirir los conocimientos de la escritura. Los

<sup>38</sup> CDMH. Fondo PS, Santander, serie D, 26/5, n° 1-18.

<sup>39</sup> Un trabajo pionero en lo que al estudio de los dictados se refiere es el realizado por A. Chervel, D. Manesse, *La Dictée. Les français et l'orthographe*, París, Calmann-Lévy, 1989 y Id., *Comparaison de deux ensembles de copies de dictées, 1873-1987. Methodologie et resultats*, París, INRP, 1989.

<sup>40</sup> A. Viñao Frago, *La enseñanza de la lectura y la escritura: análisis socio-histórico*, «Anales de documentación», vol. 5, n. 1, 2002, p. 353. Un amplio estudio sobre este tema puede verse en A. M. Chartier, *Enseñar y a leer y escribir. Una aproximación histórica*, México, Fondo de cultura económica, 2004.

ejercicios habituales en clase quedaron reflejados en los cuadernos escolares de los alumnos. Las profesoras María del Mar del Pozo y Sara Ramos Zamora han analizado este nuevo material para la Historia de la Educación. Señalan cuatro actividades presentes en los cuadernos: la copia, el dictado, la redacción y la composición. Las dos primeras estaban relacionadas con la enseñanza de las primeras letras, la mejora de la caligrafía, la adquisición de normas ortográficas y gramaticales; ambas incluían también mensajes moralizantes o éticos, y los dictados, en numerosas ocasiones, eran aprovechados para realizar resúmenes de la lección, en los que se incluían contenidos de las materias del currículo. Redacciones y composiciones estaban pensadas para alumnos que ya tenían el hábito de escribir pues eran ejercicios más complicados y también en los que el discente podía expresarse libremente<sup>41</sup>. Observamos, por tanto, que la práctica del dictado no estaba tan asociada a las competencias ortográficas (como es el caso de Francia en el que la difícil ortografía francesa se fijaba a través de la práctica del dictado, tal y como han demostrado André Chervel y Danièle Manesse<sup>42</sup>), sino que a través de estos ejercicios de escritura se pretendía reforzar otras materias o incluso introducir comportamientos morales. Este rasgo ya lo hemos apreciado en los dictados analizados puesto que por la temática de los mismos se ve claramente que la persona que los redactaba, para la posterior copia de los alumnos, no estaba interesada en el aprendizaje de las normas ortográficas como podía ser el uso de la *b* o *v* o la utilización correcta de la *h* puesto que de haber sido así hubiera utilizado otras palabras con las que explicar correctamente esas normas. En cambio los textos usados eran difíciles composiciones que perseguían inculcar las consignas políticas afines al partido encargado de impartir esas lecciones.

Durante la guerra también se usó este ejercicio escolar para transmitir conocimientos prácticos y conceptos que el soldado debía conocer. Así lo atestigua el estudio sobre los cuadernos de la 145ª Brigada Mixta realizado por Antonio Castillo Gómez y Verónica Sierra Blas. En estos cuadernos de ejercicios de los milicianos los dictados contenían saberes propios para el avance de la contienda o advertencias para los soldados: «De entre todos los ejercicios de escritura relacionados con la formación militar de los combatientes, tan sólo observamos en los cuadernos diversos dictados dedicados a los gases de guerra o a los agresivos químicos, cuyo objetivo claramente se dirigía a advertir a los soldados cómo debían actuar en el caso de que fueran rociados con dichos gases»<sup>43</sup>.

<sup>41</sup> M.M. del Pozo Andrés, S. Ramos Zamora, *Prácticas de escritura en los cuadernos escolares españoles (1920-1940)*, en J. Meda, D. Montino, R. Sani (edd.), *School exercise books. A Complex Source for a History of the Approach to Schooling and Education in 19<sup>th</sup> and 20<sup>th</sup> centuries*, Florencia, Polistampa, 2010, pp. 823-846, especialmente pp. 834 y ss.

<sup>42</sup> Chervel, Manesse, *La Dictée. Les français et l'orthographe*, cit.; Id., *Comparaison de deux ensembles de copies de dictées, 1873-1987. Methodologie et resultats*, cit.

<sup>43</sup> Castillo Gómez, V. Sierra Blas, *Si mi pluma valiera tu pistola. Adquisición y usos de la*

### 2.3. *Materialidad de los documentos*

Los dictados fueron realizados sobre finas cuartillas de baja calidad. La mayoría de ellos aparecen escritos con pluma y tinta negra (12), otros han sido realizados a lápiz (4), seguramente porque aquellas personas que los hicieron no disponían de dicha herramienta o no tenían la soltura suficiente como para escribir con pluma. Esto se ve muy bien reflejado en aquellos dictados que se han comenzado a redactar con pluma y ante la dificultad de su trazo se ha abandonado este instrumento de escritura para continuar el ejercicio a lápiz (2), como por ejemplo el ejercicio de Consuelo Herranz<sup>44</sup>. Además, es el único dictado que aparece escrito en el verso y en el reverso de la cuartilla: esto se debe a la mala distribución de la escritura sobre el papel provocado por un módulo de letra demasiado grande, propio de aquellas personas que están aprendiendo a escribir, y unas separaciones interlineales excesivas. Todo ello nos indica que la autora no tenía un esquema mental previo que le ayudara a delimitar el espacio de escritura.

En cuanto a la disposición del texto, en general aparecen muchas irregularidades. Podemos decir que no existe una norma general para la distribución del escrito. Para delimitar los márgenes suelen utilizar el propio borde del papel. En ocasiones, se deja un pequeño espacio al comienzo de la escritura. En la mayor parte de los dictados no aparecen sangrías. Casi la totalidad de los mismos están escritos en vertical, aunque tres están apaisados. Normalmente no se respetan unos márgenes o un interlineado concreto, lo que debemos relacionar con las competencias de escritura de cada individuo. Observamos cómo algunos tienen márgenes y la disposición de los renglones es ordenada y limpia, como por ejemplo en los trabajos de Encarnación Asensio, León Fernández y Aurelio Andreu<sup>45</sup>. En cambio, en otros vemos que ha significado un gran esfuerzo para sus autores estructurar bien el espacio, incluso apreciamos cómo hay renglones que aparecen torcidos o inclinados (el papel no era pautado lo que podía haber ayudado a la hora de escribir o colocar la escritura): José María López, José Barril Blanco, Fernando Manzanares<sup>46</sup>.

Parece ser que la persona que dictó estos ejercicios no proporcionó unas normas previas para su realización. Es decir, vemos cómo hay dictados escritos en vertical en la hoja y otros aparecen apaisados, cómo algunos guardan una separación entre línea y línea y unos ciertos márgenes y otros no. Las personas que realizaron esta actividad se limitaron a copiar lo que decía el profesor, sin recibir unos consejos anticipados sobre cómo debían empezar a escribir, el lugar que debían ocupar las líneas, las sangrías, los márgenes, etc. Este puede

*escritura en los frentes republicanos durante la Guerra Civil española*, cit., p. 201.

<sup>44</sup> CDMH. Fondo PS, Santander, serie D, 26/5 n° 12.

<sup>45</sup> CDMH. Fondo PS, Santander, serie D, 26/5 n° 6-9-4

<sup>46</sup> CDMH. Fondo PS, Santander, serie D, 26/5 n° 13-7-14.

ser un rasgo distintivo de la educación para adultos, de manera que en este tipo de instrucción la compaginación tal vez no era tan importante; mientras que en la enseñanza de primeras letras para niños sí es relevante hablarles de unas normas que regularizaran su escritura, lo que conllevaba la enseñanza de una disciplina y de un orden. Así al observar trabajos escolares de niños se aprecia como se valora la pulcritud y la armonía de los mismos; enseñar las normas, las pautas y las prohibiciones de la escritura también significa enseñar unas pautas de comportamiento y de conducta social, el niño debe acatar las normas impuestas tanto para su vida diaria como para la realización de cualquier ejercicio escolar<sup>47</sup>.

#### 2.4. *Análisis gráfico-lingüístico*

Los dictados que analizamos en este trabajo son una muestra más de lo que se ha denominado como «escritura popular»<sup>48</sup>. Teodoro, Encarnación, José, León, Domingo, Fernando, y demás autores de estos ejercicios no tenían todavía desarrollada la habilidad necesaria para escribir con corrección, o lo que es lo mismo, no estaban plenamente alfabetizados. Por tanto podemos deducir que con la realización de esta actividad escolar buscaban mejorar su caligrafía o su ortografía. Resumiendo, los autores de los dictados realizaron los mismos como forma de avanzar en su aprendizaje de lecto-escritura, la cual, en algunos casos, tal y como veremos más adelante, era muy deficiente.

Gracias a la conservación de estos dictados podemos observar de primera mano un proceso de adquisición gráfica. En dicho proceso los autores, aunque principiantes, se encontraban en una fase avanzada puesto que ya eran capaces de escribir con mayor o menor acierto. Al inicio de éste los futuros escritores tan sólo se pueden conformar con dibujar las letras que ven, reproducir los signos en un papel sin conocer apenas su significado. Según pasa el tiempo y la práctica, empiezan a ser capaces de asociar cada letra con su sonido, con su significado, es entonces cuando pueden componer sus propios escritos. El proceso de adquisición gráfica es muy parecido en niños y adultos, ya que

<sup>47</sup> A. Vñao Frago, *Los cuadernos escolares como fuente histórica: aspectos metodológicos e historiográficos*, «Annali di Storia dell'Educazione e delle Istituzione Scolastiche», vol. 13, n. 1, 2006, pp. 27-28.

<sup>48</sup> Existe una amplia producción científica en torno a la escritura popular, si bien bastará con citar aquí como aproximación al tema algunas de las contribuciones españolas que han tenido mayor repercusión científica. Véase A. Castillo Gómez (ed.), *Cultura escrita y clases subalternas: una mirada española*, Sendoa, Oiartzun, 2001; Id. (ed.), *La conquista del alfabeto. Escritura y clases populares*, Gijón, Trea, 2002. Algunas contribuciones sobre distintos ejemplos de escritura popular en Edad Contemporánea pueden verse en M. Lyons (ed.), *Ordinary Writing, Personal Narratives: Writing practices in XIX<sup>th</sup> and early XX<sup>th</sup> century Europe*, Berna, Peterlang, 2007.

a pesar de las diferencias muchas características del proceso formativo en primeras letras de los niños pueden extrapolarse a los adultos. Para analizarlas vamos a seguir el estudio realizado por Emilia Ferreiro y Ana Teberosky quiénes analizaron el proceso de adquisición de lengua escrita en niños<sup>49</sup>, investigación que más tarde aplicó a su Tesis Doctoral, con excelentes resultados, la profesora Verónica Sierra Blas<sup>50</sup>.

Estas autoras defienden que el conocimiento de lo escrito comienza antes de que la escuela lo enseñe, es decir, los niños ya tienen destrezas lingüísticas previas a su experiencia educativa. Este aspecto se correlaciona muy bien con la educación de adultos. Obviamente muchos de los individuos que realizaron los trabajos que nos ocupan ya habían tenido contactos anteriores con la escritura en algún momento de su vida. La mayoría conocían las letras y el lenguaje, aunque desconocían las reglas básicas de la lengua escrita (uso de mayúsculas, puntuación, ortografía), por eso observamos tantos errores en estos apartados. Una de las mayores dificultades para los adultos que tienen una educación tardía es transponer su lengua hablada a la lengua escrita, quedando en muchas ocasiones rastros de oralidad en sus escritos.

La segunda tesis de las autoras es que en este momento del aprendizaje los niños intentan comprender el lenguaje que les rodea y para ello formulan sus propias hipótesis, creando su propia gramática. Esto también se ve reflejado en los dictados analizados, en los que aparecen errores que son, en realidad, símbolo de avances. Por ejemplo, en el dictado realizado por Fernando Manzanares se acentúa la palabra *intrépido* (intrépido) aunque está aparece mal escrita puesto que el autor se ha comido la -d- final<sup>51</sup>. En este caso es más importante el uso del acento que el error consiguiente, ya que demuestra una interiorización de las normas ortográficas.

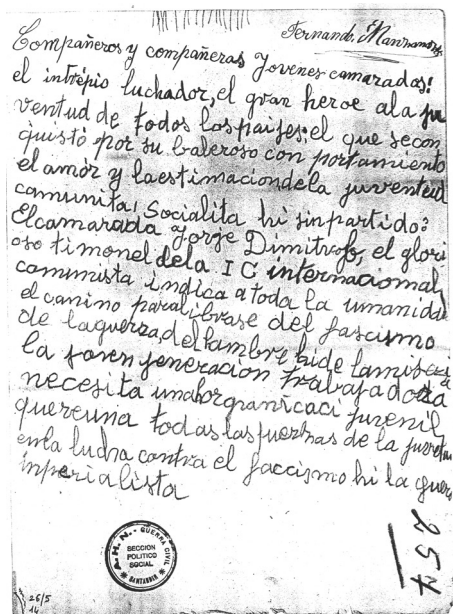
En cuanto a las diferencias en la adquisición de la Cultura Escrita de los niños y de los adultos, la más significativa quizás sea el distinto tiempo que necesitan para aprender. Los niños tardan más que los adultos en adquirir ciertas habilidades, por ello algunas fases que en los niños duran un par de años en los adultos pueden estar resueltas en un par de meses. Esto es debido a factores fisiológicos, como pueden ser: la maduración general del sistema nervioso, el desarrollo psicomotor, los ejercicios de habilidad digital, etc.<sup>52</sup>

<sup>49</sup> Para una mejor comprensión de estos temas remito directamente a su obra E. Ferreiro, A. Teberosky, *Los sistemas de escritura en el desarrollo del niño* (1979), Buenos Aires, Siglo XXI editores, 1979.

<sup>50</sup> V. Sierra Blas, *Letras huérfanas. Cultura escrita y exilio infantil en la Guerra Civil española*, Tesis en Historia, Facultad de Filosofía y Letras, Universidad de Alcalá, AA. 2008-2009, pp. 544-551.

<sup>51</sup> CDMH. Fondo PS, Santander, serie D, 26/5, nº 14.

<sup>52</sup> J. de Ajuriaguerra et al., *La escritura del niño. La evolución de la escritura y sus dificultades*, Barcelona, Laia, 1980, pp. 29-31.



Pic. 3. Dictado de Fernando Manzanares [CDMH-Salamanca].

Son muchas las circunstancias que unen a los dictados que estamos analizando, parece que todos fueron producidos más o menos en el mismo momento, en una misma clase improvisada, quizás, incluso, fueran dictados por la misma persona. La característica más relevante de todos ellos, anunciada anteriormente, es que son excelentes testimonios de la «escritura popular». Lo observamos en los problemas gráficos que aparecen en estos ejercicios. Siguiendo las características ofrecidas por Rita Marquilhas en su trabajado pionero sobre los escribientes populares o *maos inabis*<sup>53</sup> podemos señalar cuáles son las peculiaridades que cita la autora y que se repiten en los ejercicios analizados. Para ello tomaremos como ejemplo uno de los dictados, realizado por alguien que estaba dando los primeros pasos en su aprendizaje gráfico. Se trata del dictado

de Fernando Manzanares, que reproducimos a continuación<sup>54</sup>.

No hace falta hacer un estudio exhaustivo del ejercicio para poder ver cuáles son los errores más significativos del mismo. La ausencia de cursus en la grafía es notable, las letras son realizadas con esfuerzo, en muchas ocasiones podemos decir que el autor todavía no ha interiorizado del todo el significado de las mismas y las dibuja a duras penas lo que provoca que aparezcan separadas unas de otras sin las correspondientes ligaduras. El trazado de las mismas es muy inseguro por ello podemos observar la rigidez y la falta de cohesión. La escasa firmeza del trazo es un rasgo más que nos habla de una escritura realizada por un escribiente poco ejercitado. Otra de las características comunes dentro de los escritos de este tipo es el uso de un módulo grande provocado porque la letra se realiza de una forma forzada y costosa. La tendencia descendente de las líneas es debido a la ausencia de linealidad en el conjunto del ejercicio lo que nos indica la incapacidad del autor para seguir un esquema mental previo. Esto afecta también a la disposición textual que es desproporcionada, normalmente sin márgenes y si aparecen suelen ser irregulares.

<sup>53</sup> R. Marquilhas, *A faculdade das Letras. Lectura e escrita em Portugal no séc. XVII*, Lisboa, Imprensa Nacional-Casa da Moeda, 2000, pp. 238-242. Las características que se explican a continuación y que se aplican a los dictados analizados han sido extraídas de este trabajo.

<sup>54</sup> CDMH Fondo PS, Santander, serie D, 26/5, n° 14.

A simple vista estos son los errores que más nos pueden llamar la atención dentro del dictado de Fernando Manzanares, pero si descendemos un poco más y nos fijamos en la ortografía o los errores lingüísticos encontramos más faltas, muchas ya han sido señaladas en otros estudios, como por ejemplo el realizado por Attilio Bartoli sobre la escritura popular, aunque el idioma que analiza este autor es el italiano podemos servirnos de algunas de las características que anuncia y que también percibimos en nuestra propia lengua<sup>55</sup>. Uno de ellos es producido por uno de los problemas ya mencionados: la dificultad para diferenciar la lengua oral de la escrita, fruto de ello es la incorrecta segmentación de las palabras puesto que se tiende a reproducir la oralidad. Volviendo al dictado de Fernando Manzanares podemos leer: *ala juventud, con portamiento, paralibrarse, lamiseria...* Este error es común en las personas que están aprendiendo a escribir, sobre todo en los artículos del nombre y las preposiciones que se tienden a unir con los nombres y los verbos<sup>56</sup>. Es un fallo que se produce tanto en niños como en adultos, como bien apuntaba la profesora Verónica Sierra Blas:

Ausencia de conocimiento de las segmentaciones convencionales, lo que provoca que esta característica de la separación errónea se ligue única y exclusivamente al nivel de aprendizaje en que el niño o niña que escribe se encuentra, un nivel en el que todavía no ha comprendido los usos estándares de la segmentación de las palabras, como le ocurriría a cualquier adulto analfabeto o semianalfabeto con una escasa competencia de escritura<sup>57</sup>.

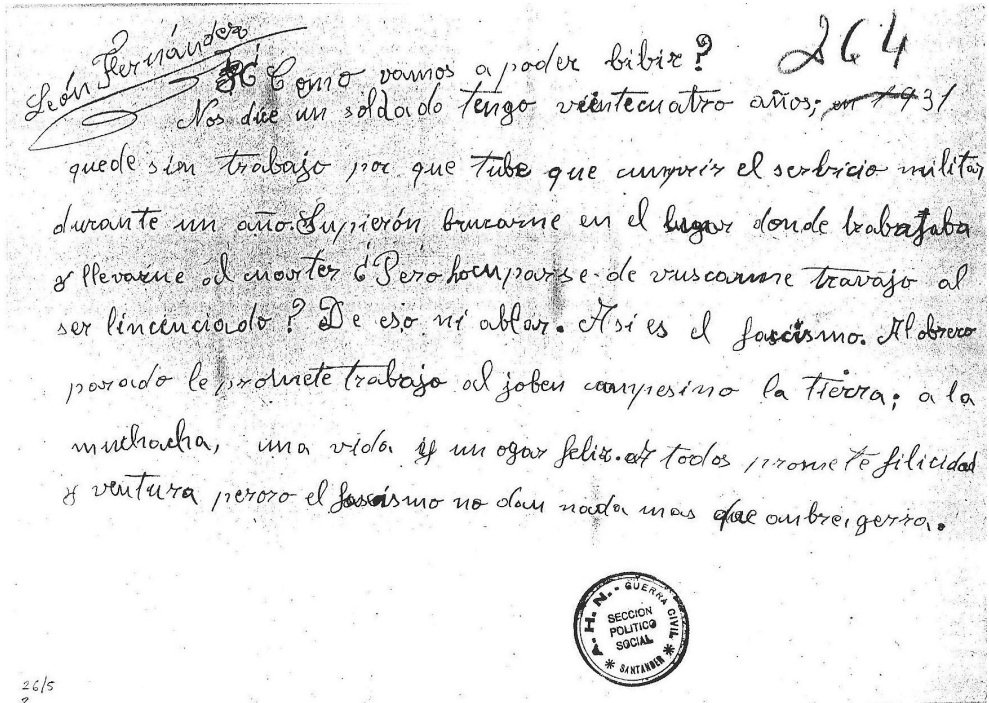
No todos los ejercicios se encuentran en la misma fase del proceso de aprendizaje gráfico. Por ello, no todos presentan tantas dificultades para su realización como el citado anteriormente de Fernando Manzanares. Hay algunos en los que la escritura ya alcanzado un cierto nivel de madurez aunque siguen presentando algunos problemas, como la tendencia descendente o la dificultad para seguir un pautado mental, aunque ya aparecen márgenes. En cuanto a la grafía disminuye de tamaño, volviéndose más personal y aparecen las primeras ligaduras de las letras. Incluso en algunos podemos apreciar cierta inclinación previa a la cursividad. Estos rasgos los observamos en el dictado de León Fernández, vemos como se ha seguido un pautado mental guardando márgenes y espacios interlineales, en cambio las faltas de ortografía aparecen con frecuencia siendo las más repetidas las que implican el uso de la b/v y el de la -h-, tales como: *bibir, tube, vuscarme, trabajo, hablar, joben, ogar*<sup>58</sup>.

<sup>55</sup> A. Bartoli Langeli, *La scrittura dell'italiano*, Bologna, il Mulino, 2000, pp. 165-166.

<sup>56</sup> Estas características básicas han sido establecidas por un estudio pionero realizado por E. Ferreiro, C. Pontecorvo, N. Ribeiro Moreira, I. García Hidalgo en su obra *Caperucita Roja aprende a escribir. Estudios psicolinguísticos comparativos en tres lenguas*, Barcelona, Gedisa, 1998.

<sup>57</sup> Sierra Blas, *Letras huérfanas. Cultura escrita y exilio infantil en la Guerra Civil española*, cit., p. 594.

<sup>58</sup> CDMH Fondo PS, Santander, serie D, 26/5, n° 8.



Pic. 4. Dictado de León Fernández [CDMH-Salamanca].

Es posible que estos dictados mejor realizados pertenezcan a personas que ya tenían ciertos rudimentos gráficos antes de asistir a las clases de las JSU, por eso vemos que el trazo es más seguro, el módulo de la letra más uniforme. Aunque se presentan dificultades para escribir ciertas palabras, complejas para alguien que comienza a realizar sus primeras letras, es el caso de *fascismo* palabra que aparece repasada varias veces indicando la duda del autor respecto a su ortografía (faccismo-fascismo).

Siguiendo con las características de la escritura popular es común la ausencia o abuso de los símbolos que ayudan a ordenar el texto, tales como comas, puntos, etc.<sup>59</sup> En los dictados ese rasgo es difícilmente observable, puesto que los alumnos se limitan a copiar aquello que el «profesor» dicta. A pesar de ello observamos errores que muestran que copian el signo pero no lo interiorizan, ni saben lo que significa, puesto que lo dibujan mal. Así en lugar de “encontramos”, careciendo así el símbolo de todo su significado. También tienen dificultades para utilizar los signos de exclamación e interrogación, lo observamos en el ejemplo extraído del dictado de José Barril Blanco, en él realiza mal el símbolo

<sup>59</sup> Bartoli Langeli, *La scrittura dell'italiano*, cit., pp. 165-166.



¡ Como vamos a poder vivir!  
 Nos cabe un soldado... tengo 2 veinte  
 enatro años, en 1931 queda sin trabajo porque  
 tuve que cumplir el servicio militar...  
 que año de guerra...

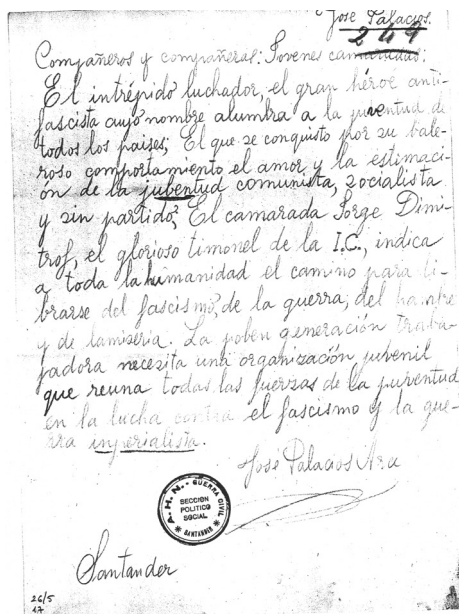
Pic. 5. Fragmento extraído del dictado de José Barril Blanco [CDMH-Salamanca].

de exclamación al iniciar la frase, aunque es consciente y después lo corrige. Una línea después también se equivoca en el uso de los dos puntos y en el de punto y coma, simplemente los copia demostrando que tan sólo sigue las directrices del profesor aunque realmente no ha interiorizado el uso y significado de estos símbolos<sup>60</sup>.

Para terminar, debemos mencionar que también existen dictados que tienen un dominio de la escritura óptimo y de sus reglas, tanto gramaticales como ortográficas. En ellos se produce un avance en la unión de las letras, lo que modifica el trazo. Las letras se despojan de los adornos y de los detalles, el hábito de escribir es más usual entre sus autores y tienen una maestría mayor, con lo cual la escritura se simplifica y cursiviza. Se aprecia una mayor soltura y una mejor disposición del espacio, lo que dota de ligereza al conjunto, observándose cómo el acto de escribir ya no supone un gran esfuerzo para los escribientes. Tan sólo encontramos cuatro dictados que presentan estas características; los catorce restantes presentan, en mayor o menor medida, problemas tanto gráficos como lingüísticos. Esto lleva a pensar que esta minoría acudiera a las clases de la JSU para mejorar su ortografía o sus conocimientos gramaticales, culturales o incluso políticos. Reproducimos el dictado de José Palacios Ara, a forma de ejemplo<sup>61</sup>. En él vemos como el número de faltas de ortografía ha disminuido notablemente, aunque se siguen produciendo sobre todo en las palabras con -v- como: “jubentud”, “jubenil”. La novedad que presenta este ejercicio es que las faltas han sido corregidas, en algunos casos incluso subrayadas, en otros tan sólo han enmendado encima del error. No tenemos los datos suficientes como para averiguar de parte de quién venían esas correcciones, si del propio alumno

<sup>60</sup> CDMH Fondo PS, Santander, serie D, 26/5, n° 7.

<sup>61</sup> CDMH Fondo PS, Santander, serie D, 26/5, n° 17.



Pic. 6. Dictado de José Palacios Ara [CDMH-Salamanca].

o del profesor, pero lo cierto es que ya existía el interés de no volver a cometer dichas faltas.

Resumiendo, en el análisis de estos dictados se observan los rasgos principales de la escritura popular, algo normal puesto que la mayor parte de los mismos han sido realizados por personas con escasa competencia gráfica que todavía no tenían un desarrollo completo de su habilidad escrituraria. Los rasgos de la escritura popular parecen repetirse en el tiempo, puesto que las manos que la realizan son todavía inexpertas y no tienen un dominio pleno de la Cultura Escrita. Así, observamos como las características de las que Rita Marquilhas nos hablaba en su estudio sobre escrituras populares en el Portugal del s. XVII tienen eco en pleno siglo XX.

Los autores de estos dictados no estaban plenamente alfabetizados, pudiendo encuadrarlos en el nivel de semianalfabetos funcionales, siguiendo la clasificación de Armando Petrucci, es decir, eran personas que recurrieron a la escritura por necesidad, teniendo poca costumbre de realizar este tipo de ejercicios<sup>62</sup>. Algo, por otra parte, usual en ese momento histórico cuando muchas personas necesitaron servirse de la escritura para comunicarse con sus familiares que se encontraban en el frente, en la cárcel o evacuados por la guerra. El acceso de las clases populares al mundo del escrito es algo que se venía produciendo desde el siglo XVI, pero sin duda, fue en el siglo XX, con sus emigraciones, conflictos bélicos y episodios de exilio, cuando se produjo un verdadero *boom* de la escritura popular unida a la verdadera necesidad de escribir por parte de estos *escribientes inexpertos*<sup>63</sup>.

En conclusión, el análisis realizado nos permite demostrar cómo las políticas educativas impulsadas por la II República, al igual que las distintas iniciativas privadas, y continuadas durante la contienda, así como la necesidad de escribir de los individuos inmersos en el fenómeno histórico que se habían visto obligados a protagonizar, provocó que muchos *escribientes inexpertos* se lanzaran a la conquista del mundo del alfabeto. El estudio de sus grafías nos

<sup>62</sup> Petrucci, *La ciencia de la escritura. Primera lección de Paleografía*, cit., pp. 27-31.

<sup>63</sup> A. Petrucci, *Scrivere lettere. Una storia plurimillennaria*, Roma-Bari, Laterza, 2008, pp. 148 y ss.

ofrece un acercamiento mayor a las prácticas de escritura dentro de ámbitos que normalmente han pasado desapercibidos.

Dicho estudio no hubiera sido posible si no hubiera sido por los fines represivos que han provocado que estos documentos llegaran hasta nosotros. Ejercicios realizados de forma inocente y espontánea lo que hizo que sus autores nunca pensarán el peligro que corrían al firmarlos, o quizás alguno si lo hizo, como el caso de Cirilo Huertas quien rasgó su nombre del papel en un intento de borrar el mismo, aunque olvidó eliminar también la firma al final del ejercicio<sup>64</sup>.

El análisis de este tipo de documentación, seguramente producida en uno de los clubes de educación que se hicieron en la retaguardia, como demuestra la temática altamente bélica y politizada de los mismos, y las fechas de producción, nos sirve para constatar el uso del dictado como ejercicio utilizado para introducir las ideas del partido, algo común a esta época histórica en la que la educación está totalmente adoctrinada y manipulada. Si bien es cierto que la extensión social de la educación durante la II República acercó la misma a la gente más desfavorecida, no debemos obviar que se hizo siempre dentro de los valores republicanos y antifascistas. Tal y como afirma Juan Manuel Fernández Soria: «Desaparecen las clases fundadas en la desigualdad social, pero surgen otras levantadas sobre la diferencia política e ideológica»<sup>65</sup>.

En definitiva, este artículo viene a constatar, una vez más, el uso político que se dio a la educación durante la Guerra Civil. Desde la mayoría de las organizaciones políticas, ya fueran de un bando u otro, se intentó educar dentro de los parámetros y consignas que defendían. Esto derivó en el interés por trasladar la lucha más allá del campo de batalla, tan sólo había que cambiar los instrumentos. Por ello, se emprendió una dura cruzada para adoctrinar y politizar a la población. Para lo cual dejaron de lado los fusiles y empuñaron las plumas, sabiendo que éstas eran un arma más poderosa, incluso, que aquellas con las que se defendían en el campo de batalla.

<sup>64</sup> CDMH Fondo PS, Santander, serie D, 26/5, nº 1.

<sup>65</sup> Fernández Soria, *Educación, socialización y legitimación política. España 1937-1970*, cit., p. 53.



# The revolution and the national primer: the Tatar «Alifba» of the 1920s- early 1930s\*

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**ABSTRACT:** 1920s and early 1930s was the time when the new generation of Tatar primers (alphabet books) acquired a fundamentally new ideological basis. The Bolshevik reform of the ethnic school education system aimed to free it from manifestations of «bourgeois nationalism» and religious «backwardness» and to create a new Soviet identity for both students and teachers. This inevitably resulted in truly «revolutionary» changes in Tatar primers and had a serious impact on both their contents and design. In this article we examine «transitional» Tatar Arabic alphabet-based primers of early and mid-1920s, which combined Soviet content with traditional patriarchal values. We also study the primers with Latin script that replaced them at the turn of the 1930s. These can be characterized by a gradual (although quite rapid) substitution of the ethnic discourse with the Soviet

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discourse. We trace the process of filling the primers with new, socialist content and their transformation into an important political and propagandist educational tool for new Soviet citizens – builders of the multinational socialist Russia.

EET/TEE KEYWORDS: Revolution; Reform of the educational system; Soviet identity; National identity; XX<sup>th</sup> Century.

### *Introduction*

Before the Russian October revolution of 1917 the main mission of the Tatar primers was not just educational but cultural as well. Other publications in minority languages could hardly compete with them in terms of scope. After the revolution, their main mission was that of political education.

In the Soviet period Tatar primers became a material part of the educational space where the government implemented various strategies and practices of imposing Soviet mindset on children and sometimes on adults, eradicating the «bourgeois nationalism» and nurturing «proletarian internationalism», which was supposed to propagate the achievements of Soviet power and Soviet lifestyle. A characteristic feature of these practices was the conscious negation of continuity and viewing «revolutionary breach» and «severance» as methods of creating every new generation of textbooks. This is true for a number of periods: for the early and mid-1920s, when prerevolutionary Tatar primers were substituted with textbooks which had «class-based» content; for the second half of the decade, when new Soviet primers with Arabic script were forcefully replaced by textbooks with Latin script (yanalif)<sup>1</sup>; for the late 1930s, when the Latin script was suddenly replaced by the Cyrillic alphabet; for the Khrushchev Thaw of the late 1950s – early 1960s, when the Tatar primers were purged of manifestations of Stalinism; and for the late 1960s, when finally the exemplary (as it seemed) Soviet Tatar primer was created, which has remained practically unaltered up to the years of perestroika and the collapse of the USSR. However, immediate and complete severance of historical continuity was not always possible to reach. Some examples of these include the invitation of representatives of the old, prerevolutionary local pedagogical school (e.g., M.Kh. Kurbangaliev) to work on the new primers, a delayed retiring of primers with Latin script in the 1940s, which was justified by the hardships of the wartime and the post-war period, as well as the active use of Soviet primers in the post-Soviet Tatarstan. The innovative elements in the primers' texts and context were successfully combined with manifestations of the “long”, “slow” time

<sup>1</sup> Yanalif (Tatar yanga alifba/jaņa əlifba, literally «new alphabet») was a uniform alphabet based on the Latin alphabet which came to replace alphabets based on Arabic script. The yanalif was officially adopted in the Turkic language-speaking republics of the USSR in 1927-1928.

which encompasses all material attributes of everyday life, including a primer as an attribute of school life and daily educational routine. This continuity, often intentionally rejected, brought the needed stability to the school life, which was revealed in both preserving its material components and their daily usage. This is the reason why the Soviet «Alifba» accumulated not only the whole Soviet experience with all its manifestations, results and supposed prospects, but also the whole previous social and cultural background, which makes it a most valuable source of knowledge and understanding of the past, including that of the Tatar nation.

The October revolution of 1917 brought fundamental changes into all spheres of life for all peoples of Russia, including education, science and culture.

Defining the early Soviet state as an empire of «affirmative action», the renowned American scholar of the history of nations and nationalism Terry Martin noticed that «no multiethnic state has subsequently matched the scope of Soviet affirmative action», which was widespread in the early USSR and formed one of the defining characteristics of the regime:

Russia's new revolutionary government... confront[ed] the rising tide of nationalism and respond[ed] by systematically promoting the national consciousness of its ethnic minorities and by establishing for them many of the characteristic institutional forms of the nation state. The Bolshevik strategy was to assume leadership over what now appeared to be the inevitable process of decolonization and to carry it out in a manner that would preserve the territorial integrity of the old Russian empire and enable the construction of a new centralized, socialist state<sup>2</sup>.

The dual policy designed to stimulate minority languages and minority elites, which was soon named the policy of «korenization», naturally concerned the system of local education as well. Introduction of new Soviet values by way of teaching the native language and teaching in the native language was supposed to make Soviet power «friendly», understandable and easy to relate to. Tatar primers were one of the main symbolic markers of the national identity which underwent an «aggressive promotion» (ethnic folklore, museums, clothes, food, costumes, etc.)<sup>3</sup>. The Soviet primers in minority languages developed most successfully in the areas which had certain historic and cultural background, including prerevolutionary traditions, previous experience of compiling primers, presence of intellectual elites and a well-developed system of native-language education.

<sup>2</sup> T. Martin, *An Affirmative Action Empire: The Soviet Union as the Highest Form of Imperialism*, «Ab Imperio», vol. 2, n. 1, 2002, pp. 55-56 and 80. «Affirmative action» is understood as the policy which favors the members of ethnic groups who previously suffered from discrimination (p. 79).

<sup>3</sup> *Ibid.*, p. 72.

In the 1920s, a lot of primers for adults were created as well. Their emergence was related to the literacy campaign in Soviet Russia, which began with a decree of the Council of People's Commissars (CPC) dated December 26<sup>th</sup>, 1919. The decree mandated obligatory teaching of reading and writing to the whole population of the country aged 8 to 50. In 1923 the All-Russian Central Executive Committee (VtsIK) and the CPC of the Russian Soviet Federal Socialist Republic (RSFSR) issued another decree *On the eradication of illiteracy*, which established the 10<sup>th</sup> anniversary of the October revolution – November 7<sup>th</sup>, 1927 – as the deadline for this project. However, the conversion of Tatar alphabet into yanalif in 1927 immediately made all the adult population of the Tatar Republic «illiterate». Tatar primers for adults became a unique historic and cultural phenomenon, and studying them is, in our opinion, a separate research task.

### 1. *The first Tatar Soviet primers for children*

On May 27<sup>th</sup>, 1920 the Soviet government signed a decree setting up the Tatar Autonomous Soviet Socialist Republic (TASSR), with a heterogeneous ethnic and religious population structure, which was represented by two main ethno-confessional communities of the region – Tatars and Russians, the Islamic and the Orthodox Christian communities. This quasi-state was originally supposed to satisfy political, economic and cultural ambitions of the titular ethnic group of the region, including opening Tatar national schools, raising the educational and cultural level of the Tatar people, and especially pursuing the new language policy focused on the wide usage of Tatar both in the spheres of administration and popular education. By the decree of the Tatar Central Executive Committee and the CPC of the Tatar Republic dated June 25<sup>th</sup>, 1921 and titled *On the Introduction of Tatar language into documentation management*, Tatar was declared the official language alongside with Russian and was established as mandatory in all educational institutions of TASSR<sup>4</sup>.

Soviet Tatar schools started to open in compliance with the orders of the RSFSR's People's Commissariat for Education (*On schools for non-Russian peoples of the Republic*, October 18<sup>th</sup>, 1918 and *On national minority schools*, October 31<sup>st</sup>, 1918). These granted an opportunity to study in the native language to students of all nationalities at primary and secondary schools. In 1921 several Academic centers were formed within the structure of the People's Commissariat for Education (PCE) to serve the purpose of ideological leadership and coordinating research, teaching and cultural education. One such center appeared at TASSR's People's Commissariat Education, ready to deal with the issues of teaching at the ethnic schools of the region.

<sup>4</sup> *Sbornik dekretov, postanovleniy, vazhneyshikh tsirkulyarov i drygikh materialov v oblasti realizatsii tatarskogo yazyka* [Collection of Decrees, Resolutions, the Most Important Circulars, and Other Materials in the Sphere of Tatar Language Realization], Kazan, Tatsik, 1925, p. 24.



1923 was the crucial year for Tatar national education, when the RSFSR's PCE adopted a resolution *On eliminating religious education at Islamic schools* (January 3<sup>rd</sup>, 1923) and the decree *On registration of religious communities* (February 8<sup>th</sup>, 1923), according to which Islamic religious schools were subject to compulsory closure. These actions met with an extremely negative reaction from the Muslim population. Unwilling to let the tension build up, the Soviet administration was obliged to make some concessions, which manifested itself in the order of the Central Executive Committee and CPC of RSFSR dated October 8<sup>th</sup>, 1923. This document allowed teaching the basics of the Islamic doctrine in mosques and at private homes. But this decision did nothing to develop or at least preserve the traditions of prerevolutionary Tatar primers: teaching general subjects in these schools was still forbidden, and only those of age by the Sharia could become their students. An additional requirement was graduation from a Soviet primary school (3<sup>rd</sup> grade)<sup>5</sup>.

One of the first Tatar primers published in the Soviet period was the «Tatar elifbasi» [Tatar primer] by Mukhitdin Kurbangaliev (1922)<sup>6</sup>. This primer appeared as early as in 1912<sup>7</sup> and was reissued many times before the revolution. It could be characterized as «transitional»<sup>8</sup>: while clearly different from most primers of the prerevolutionary period, it was not quite Soviet either. This primer did not contain religious texts, but it did not include ideologically tinged «Soviet» texts either. The only text on «old» life included there was a poem called *The Old School* (the author's name is not mentioned). It was filled with good humor as opposed to criticism, describing shakirds who did not want to study, only play and have fun. It is highly possible that this poem was written well before the Revolution<sup>9</sup>.

The «Tatar elifbasi» became one of the most stable Tatar primers of the Soviet period, as it was reissued numerous times up until 1945, taking into

<sup>5</sup> R. Nabiev, *Islam i gosudarstvo* [Islam and the State], Kazan, Kazan University Press, 2002, p. 83.

<sup>6</sup> Two publications came out simultaneously: *Tatar Alifbasy* [Tatar Primer]. *Mektep balalary ochen*, Kazan, TSSR State Press, 1922 (with images); *Tatar Alifbasy* [Tatar Primer]. *Mektep balalary ochen*, Kazan, no place, no date (no illustrations).

<sup>7</sup> M. Kurbangaliev, *Tatar Alifbasy*, Kazan, L.P. Antonov's Printing House, 1912.

<sup>8</sup> Characterizing 1918-1931 as a «transitional period from a prerevolutionary textbook to a Soviet textbook», famous Russian experts on the history of primers V.G. Bezrogov and T.S. Markarova consider it appropriate to distinguish between two sub-periods: 1918-1923 and 1924-1931. While in 1918-1923 mostly «cosmetic rearrangement» of the textbooks occurred, the years 1924-1931 were marked by the emergence of «purely Soviet» textbooks, while preserving or thoroughly reworking the old ones. T.S. Markarova, V.G. Bezrogov, *Predislovie*. [Introduction]. *Partiynoe vozvrashchenie k chistoy chelovechnosti*, in Id. (ed.), «*Bukvar – eto molot*» [«A Primer is a Hammer»]. *Uchebniki dlya nachalnoy shkoly na zare sovetskoy vlasti, 1917-1932 gg. Collection of Research Articles and Materials*, Moscow, NPB named after K.D. Ushinsky RAO, Azimut, Trovant, 2011, pp. 5-9. These observations can be also attributed to the current situation with Tatar primers in Soviet Tataria at that time.

<sup>9</sup> *Tatar Alifbasy* [Tatar Primer]. *Mektep balalary ochen*, cit., p. 55.

account the new ideology and changes in writing (Arabic script – yanalif – Cyrillic alphabet).

When on August 30<sup>th</sup>, 1925 RSFSR passed a law on universal primary education, which involved compulsory four-year education for children aged 8 to 11, the number of primary and secondary schools in Tataria rapidly increased: by 1926 there were more than 2,330, with 1,223 of them being Tatar schools<sup>10</sup>. This was possibly one of the reasons for the massive creation of new Tatar primers in that period. Another reason may have been the introduction of new syllabi in the academic year 1922-1923. They were compiled by the State academic board of the PCE and featured an integrated approach to teaching<sup>11</sup>.

The first primer based on this method in Kazan – the «Kyzyl yul» («Red way») by M. Fazlullin and G. Nugaybek – was published in 1925. The book was reissued several times between 1925 and 1930. Attempts to adapt it to complex topics led to impoverishment of its content, with the texts becoming more complicated.

Some truly unique primers in the 1920s include, for example, the «Yakty yul» [The Bright way] by I. Alekseev and G. Sharaf – a primer for baptized Tatars published in Arabic script<sup>12</sup>. Tatar (Islamic) names and nouns in the texts of this primer were substituted with those used by baptized Tatars, borrowed from Russian language, but slightly different: Nachtya [Nastyia], Anuk [Anna], dedey [dyadya – uncle], etc. The word «mektep» on the title page was replaced with the Russian word «shkola» [school], and «alifba» – with «bukvar» [primer, alphabet book]. Baptized Tatars often used Russian words in their speech, unlike Muslim Tatars. The emergence of such a primer demonstrated, on the one hand, that the universal national education system concerned all ethnic and religious groups of Tatars, and on the other, that each of these groups was admitted as possessing a certain cultural singularity – to the point that they were allowed to study separately from each other.

However, the main characteristic feature of all Tatar primers was the fundamental alteration of their ideological content. Religious texts were replaced by texts about the Soviet power, the October revolution and V.I. Lenin:

Grandpa Lenin loves workers. Grandpa Lenin loves peasants. Grandpa Lenin loves children. Grandpa Lenin loved all the poor people of the world. Grandpa Lenin led the workers in their struggle for freedom. Grandpa Lenin freed the peasants from their landlords. He wanted to free all the poor people of the world. Grandpa Lenin is the leader of the October revolution<sup>13</sup>.

<sup>10</sup> National Archive of the Republic of Tatarstan, f. R-732, op. 1, d. 22685, l. 2.

<sup>11</sup> The «integrated approach» was a topical principle of organizing educational materials, which eliminated the traditional subject system of education.

<sup>12</sup> I. Alekseev, G. Sharaf, *Yakty yul* [The Bright Way], Kazan, Tatar State Press, 1926.

<sup>13</sup> T. Timerbulatov, *Sovet mektebe* [The Soviet School], Moscow, Nashriyat Cooperative Press, 1927, p. 58. Due to the shortage of printing equipment in the provinces, a lot of Tatar primers of that time were published in Moscow.

The text titled *The Master of the Soviet country* was supposed to help the children to understand the organizational structure of the Soviet power – from its lower to its higher echelons:

The village is ruled by the village council. Members of the village council are elected by people. The volost (district) is ruled by the volost council. Its members are elected by the representatives of villages. The meeting of the representatives is called a congress<sup>14</sup>.

The first page of the textbooks had the slogan: «Workers of the world, unite!» Together with the theme of the «new Soviet homeland», the Soviet symbols also emerged in the Tatar primers: pictures of V.I. Lenin, red flags with USSR, RSFSR, TASSR printed on them, the Red Star, Red Army soldiers, Young Pioneers, the sickle and hammer symbol. However, such texts were still rare.

The dominant themes of the first Soviet Tatar primers were taken from everyday lives of occasionally urban, but mostly rural population of the region. The texts were usually accompanied by relevant genre illustrations made in a realistic style accessible for children, with due regard to the traditions of the Tatar national artistic culture. Clothes for children and adults, household objects, the daily routine of men and women, children's games carefully reproduced not so much the Soviet but the prerevolutionary lifestyle of the Tatar village. There was, for instance, an image of two women carrying water from a well. They are well-dressed, wearing long gowns with a large pattern, slim fit beshmets on top<sup>15</sup>, kerchiefs over kalfaks on their heads, but only bast shoes on their feet. Another picture shows three men – a grandfather, a father and a son – putting up a log-house. The artist even managed to render the tense facial expressions of the father and the son who are depicted carrying a heavy log<sup>16</sup>. Thrashing on the barn-floor, a woman baking peremyaches<sup>17</sup>, a girl collecting berries, and other pictures showing women, men, children busy with their daily routine – all these elements create an impression that the life had not changed, that there was no revolution of 1917 or Civil War. Only images of an industrial plant and a factory, a flag with USSR on it and children going to a Soviet school bring us back to the new reality<sup>18</sup>.

Primers made an important focus on the description and depiction of the world of a child and his family. Unlike many Soviet primers in Russian, which, in accordance with the new gender attitudes of the supreme power, featured images of an incomplete family – a mother with children or just one child (the image of a father appeared in Russian-language Soviet primers in the mid-

<sup>14</sup> F. Ageev, G. Ibragimov, *Kyzyl yoldyz* [The Red Star], Moscow, Nashriyat Cooperative Press Printing House, 1924, p. 78.

<sup>15</sup> The beshmet is an article of upper clothing worn by both men and women.

<sup>16</sup> Ageev, Ibragimov, *Kyzyl yoldyz*, cit., p. 15.

<sup>17</sup> The peremyach is a small pie with meat filling.

<sup>18</sup> Ageev, Ibragimov, *Kyzyl yoldyz*, cit., pp. 13, 19, 28-29, 42-47.

1930s), the Tatar primers usually showed a «complete» family, consisting of several generations – children, both parents, grandmothers and grandfathers. In this case ethnic gender stereotypes prevailed over the political ones. A typical illustration showed an evening of a large family. The grandfather is making bast shoes, the grandmother is knitting, the mother is embroidering, the father is fixing a horse collar, the boy is reading, and his younger sister is talking to her grandmother with a rag doll in her hands. The caption under the picture reads: «My grandfather, my grandmother, my mother, my father, my brother and me»<sup>19</sup>.

Images of women working on the factory floor were also absent from Tatar primers. A woman was usually shown busy with traditional «woman's housework» or some agricultural labor, cooking soup, preparing baking dough, bringing water, doing the laundry, embroidering, taking care of the children or reaping and thrashing on a par with men<sup>20</sup>. The male worker was always present in new Tatar Soviet primers. It fit well into the system of «otkhodnichestvo» [seasonal work]<sup>21</sup> which had developed in Tatar villages as early as at the beginning of the 20<sup>th</sup> century and did not contradict the traditional Tatar family lifestyle<sup>22</sup>. «The man is a breadwinner, the woman is a keeper of the family hearth» – this patriarchal scheme was neither broken nor even changed in the primers.

Since 1929, due to the general attacks on religion and church in the USSR, more antireligious materials have started appearing in Tatar primers. Old religious holidays were contrasted to the new, Soviet ones. A special emphasis was placed on November 7<sup>th</sup> – the «Revolution day». In the «Sovet mektebe» [Soviet School] primer there is a story about children actively participating in the celebrations: they march with unfolded banners, shout out slogans like «Little Octobrists are the future Young Pioneers!» or «Be prepared!» The primer gives a direct task to students: «See how the celebrations of the October revolution went in your village!»<sup>23</sup>. In the «Yana avyl» [New Village] primer it is stated that only the October 1917 gave freedom to the people:

On this day we go out in the streets with flags and banners. We sing the songs of the revolution. Our red flags have Soviet symbols on them: the sickle and the hammer. Our red banners say: «Long live the Soviets! Long live the Red October! Long live the October revolution!»<sup>24</sup>.

<sup>19</sup> I. Alekseev, G. Sharaf, *Yana avyl* [New Village], Kazan, Tatar State Press, 1926, p. 41.

<sup>20</sup> Ageev, Ibragimov, *Kyzyl yoldyz*, cit., pp. 3, 13, 15, 19, 43-44; Alekseev, Sharaf, *Yana avyl*, cit., pp. 14, 24, 26, 41, 68, 70; Timerbulatov, *Sovet mektebe*, cit., pp. 27, 90.

<sup>21</sup> «Otkhodnichestvo» [seasonal work] implied temporary jobs that peasants would have outside their places of permanent residence.

<sup>22</sup> Ageev, Ibragimov, *Kyzyl yoldyz*, cit., p. 44; Timerbulatov, *Sovet mektebe*, cit., pp. 73 and 81.

<sup>23</sup> *Ibid.*, pp. 56 and 61.

<sup>24</sup> Alekseev, Sharaf, *Yana avyl*, cit., p. 111.

Young Pioneers also appear on the pages of Tatar primers – often barefooted but with obligatory attributes of Young Pioneer, such as scarves, drums and banners, showing that they belong to the children’s communist organization. The first barefooted Young Pioneers in tubeteys can be seen in the «Kyzyl yoldyz» [Red Star] primer (1924)<sup>25</sup>. In the «Yana avyl» [New Village] primer (1926) there is an image of a barefooted boy in a Young Pioneer scarf and a tubetey, as an illustration to the poem called *We shall turn the Soviet country into a blooming garden*. The boy is holding a banner with the words «Ezer bul!» («Be prepared!») printed on it in Arabic letters. A similar Young Pioneer can be seen on the illustration to the text *Aunt Khakima’s house*, which tells a story of Young Pioneers helping the family of a Red Army soldier<sup>26</sup>. However, in T. Timerbulatov’s primer «Sovet mektebe» («Soviet school», 1927) barefooted Young Pioneers from a village are replaced by ordinary schoolchildren from the city – they proudly march along the streets and organize Young Pioneer meetings<sup>27</sup>.

Themes of healthcare and prevention of diseases (especially infectious ones), typically for their time, were also present in Tatar primers. These were texts and images showing a medical examination or vaccination against smallpox – one of the most frequent and lethal children’s diseases in the pre-revolutionary Russia. Other texts listed other, equally frequent and dangerous illnesses: rose rash, cholera, typhoid fever, scarlet fever, trachoma and scabies<sup>28</sup>. The primer contained a recommendation to maintain quarantine and to stay home instead of going to school in the case of a disease: «Our teacher told us about these diseases. We put a poster on the wall saying ‘Diseases are caused by uncleanliness. Go to a bath house every week! Wash your face every morning! Always wash your hands after doing dirty work and before your meals!’ At the medical examination the doctor tells the Young Pioneers to ‘sit up straight, keep your ears, hands and neck clean’»<sup>29</sup>. A Young Pioneer must be neat, tidy and disciplined, as an example to his younger comrades, the Oktiabriata (Little Octobrists). According to Catriona Kelly, these themes, which had purely didactic purposes and were present in contemporary textbooks of other industrial countries of the period<sup>30</sup>, were, however, created within the limits of a completely different social and cultural field. They were usually designed for

<sup>25</sup> Ageev, Ibragimov, *Kyzyl yoldyz*, cit., p. 79.

<sup>26</sup> Alekseev, Sharaf, *Yana avyl*, cit., pp. 66, 112.

<sup>27</sup> Timerbulatov, *Sovet mektebe*, cit., pp. 56, 71.

<sup>28</sup> *Ibid.*, p. 96; Alekseev, Sharaf, *Yana avyl*, cit., pp. 104-105; Alekseev, Sharaf, *Yakty yul*, cit., p. 104.

<sup>29</sup> Alekseev, Sharaf, *Yana avyl*, cit., pp. 105-106.

<sup>30</sup> C. Kelly, «Papa edet v komandirovku» [«Daddy is going to a Business Trip»]: representatsiya obschestvennykh i lichnykh tsennostey v sovetskikh bukvaryakh i knigakh dlya chteniya, in S.G. Leontyeva, K.A. Maslinsky, *Uchebnyy tekst v sovetskoy shkole* [Training Text in Soviet School], Saint-Petersburg, Moscow, Institute of Logic, Cognition, and Individual Development, 2008, p. 160.

propaganda and supposed to show the Soviet state's constant concern about the health of its citizens.

In the mid-1920s a new «revolutionary change» happened in Tatar language and culture. This time it was the introduction of the Latin script as the official system of Tatar writing, which led to the emergence of a new generation of Tatar «Latinized» primers, very different from their Arabic-alphabet based predecessors.

## 2. «Considering the matter settled»: the Latinization of Turkic alphabets and the Tatar primers of the late 1920s-1930s

The question of the conversion of Tatar writing from Arabic to Latin script was reputedly first raised as early as in the beginning of the 1910s by the famous Tatar writer and journalist S. Rameev<sup>31</sup>. He developed his version of the Latin alphabet for Tatar language. But this was only a «draft project», met by the «supporters of Arabic» with disdain, so it failed to come to life.

Less than ten years since, the idea of the «alphabet reform» was expressed once again, this time by the Bolsheviks. Interestingly, the reform was supposed to cover not only Turkic-Tatar peoples but for «all nationalities populating the territory of the Republic», including Russians<sup>32</sup>. A movement to support Latinization began in the Tatar Republic. In 1920, the issue of converting to the Latin alphabet was openly brought up at the conference of Tatar and Bashkir journalists in Kazan, and in 1924 the first group of «Latinists» was formed at the 6<sup>th</sup> United Tatar-Bashkir command school. By the beginning of 1925, volunteer groups for learning the Latin script in Tataria included about 1,000 people<sup>33</sup>. In 1924 the «Latin dusty» [Friends of Latin] all-Tatar society was formed at the Communist club of Kazan. The society regularly held discussions «on the Latinization of Tatar» and even distributed leaflets in Latin script. The de-facto leader of this society was the prominent Tatar party worker, public figure and writer Sh. Usmanov (1898-1937), who took charge of the new movement for the Latinization of Tatar writing in general.

One of the primary arguments of the Latinization supporters was that Arabic alphabet did not fit well into the phonetic system of Tatar language. But the

<sup>31</sup> S. Ramiev, *Bezge tekdil ve islakh heruf kirekme?* [Do We Need Renewed and Modified Letters?], «Idel» [«Volga»], 1911, June, p. 5.

<sup>32</sup> It was formulated in this way in the materials of the Research Department of the People's Commissariat for education in 1919. (*Kak Stalin zaschitil russky yazyk* [How Stalin Defended Russian Language], <[http://Stalinism.ru/Documentyi/Kak\\_Stalin\\_zachitil\\_russkiy\\_yazyk.html](http://Stalinism.ru/Documentyi/Kak_Stalin_zachitil_russkiy_yazyk.html)> (last accessed: February 22<sup>th</sup>, 2014).

<sup>33</sup> *Latinitsa* [Latin Graphic], in M. Kh. Khasanov (ed.) *Tatarskaya Entsiklopediya* [Tatar Encyclopaedia], 3 vols., Kazan, Institut Tatarskoy Entsiklopedii, 2006, vol. 3, p. 571.

scholarly arguments were definitely overshadowed by the political ones. The strongest of these was the difficulty of mastering Arabic writing in the context of the fast universal elimination of illiteracy happening in the USSR at that time. According to the well-known Soviet linguist E.D. Polivanov, «script revolutions» helped to significantly shorten the time of the primary learning, and by doing that presented «the best possible assistance to the literacy project – the affair of utmost importance, which the whole future of the Soviet Union depends on»<sup>34</sup>.

In the case of the Tatar Republic, it was never taken into consideration that the literacy rate of the Tatar population had already been very high: according to the 1926 census, 40,3 % of Tatar men and 27,6% of Tatar women were literate (i.e. could read and write in Arabic script)<sup>35</sup>. But in the new political context this kind of literacy was not encouraged, as it was directly associated with the Quranic writing and the «outdated» religious Islamic tradition. The conversion to the Latin script also meant a conscious breach with the secular cultural continuity as well: there was little demand for the «bourgeois» prerevolutionary secular ethnic culture. The builders of the «new Soviet life» had no need for it. Emphasizing the «counterrevolutionary essence» of the old Arabic alphabet, the Bolshevik ideologists considered the promotion of Latin writing a specific form of class struggle. The non-Russian peoples of Russia associated the Cyrillic alphabet (or, as it was often called in 1920-1930s, «the Russian script») with the assimilating policy of the Tsar government, forced Russification and Christianization. This is why the more «neutral» Latin script was chosen for the new alphabet.

The requirements induced by the current political goals had an air of romantic revolutionism to them: it seemed that the victory of the world revolution was near, and the new «international» Latin alphabet, together with another universal language of the «world proletariat» – Esperanto, would speed up the implementation of the famous slogan *Workers of the world, unite!*<sup>36</sup>

But in Tataria there were too many people who objected to Latinization, and not only among the Muslim clergy. The leading figures of the Tatar culture clearly understood that the «script revolution» could lead to a breach in the cultural continuity. Some Tatar intellectuals directly associated Latinization with the policy of Russification, calling the introduction of the Latin script «a substation on the road to the Cyrillic»<sup>37</sup>.

A fierce debate about the adoption of the Latin script broke out at the 1<sup>st</sup> Turkological congress in Baku in February-March 1926. Although most

<sup>34</sup> E.D. Polivanov, *Za marksistskoe yazykoznanie* [For Marxist Linguistics], <[http://www/ruthenia.ru/apr/textes/polivan/poliv4.htm](http://www.ruthenia.ru/apr/textes/polivan/poliv4.htm)> (last accessed: February 22<sup>th</sup>, 2014).

<sup>35</sup> V.I. Belikov, L.P. Krysin, *Sotsiolingvistika* [Sociolinguistics], Moscow, 2001, <[http://stratonomik.ru/cgyjm/sociolingvistika\\_-\\_belikov\\_22.html](http://stratonomik.ru/cgyjm/sociolingvistika_-_belikov_22.html)> (last accessed: February 22<sup>th</sup>, 2014).

<sup>36</sup> It is a known fact that the abovementioned Sh. Usmanov was a passionate fan of Esperanto, and an ardent believer in the unlimited possibilities of this artificial language.

<sup>37</sup> I.R. Tagirov, *Istoriya natsionalnoy gosudarstvennosti tatarskogo naroda i Tatarstana* [History of the Tatar Nation and Tatarstan National State System], Kazan, Tatar Book Press, p. 249.

members of the Tatar delegation explicitly or implicitly disagreed with the proposed reform (the authors of the first Tatar Soviet primers, e.g. G. Sharaf, were among its staunch opponents), the Congress made a decision to introduce the Latin alphabet for Turkic peoples of the USSR. However, it was not stated directly, but took the form of an absolute support of the Latinization experience that Azerbaijan had had by that time<sup>38</sup>.

However, the opponents of the Latinization did not quit their struggle even after that. The proof for that is the well-known *Letter of 82*<sup>39</sup> – a message from some independent Tatar intellectuals to the 3<sup>rd</sup> Plenary meeting of the TASSR Regional Committee of the All-Union Communist Party (Bolsheviks), in which the conversion to the Latin script was declared «an expensive and humiliating mass sacrifice, made for an absolutely unknown reason». A copy of the letter was forwarded to Stalin. However, the plenary meeting considered this document «a sign of an increase in the activity of bourgeois-nationalist elements» and decided «not to have a second judgment on the question of the Latinization of Turkic alphabets, considering the matter settled»<sup>40</sup>.

On August 3<sup>rd</sup>, 1927 the Central Executive Committee and the People's Commissariat for education of the TASSR declared the yanalif the official Tatar writing system. From the academic year 1928/1929 it was introduced in all educational institutions under the jurisdiction of the TASSR's PCE<sup>41</sup>.

The literacy campaign in the yanalif was supposed to cover at least 100000 people, which required immediate publication of new primers using the Latin alphabet<sup>42</sup>. Switching from one script to another was an unusually difficult task. People had to learn the new manner of reading and writing – from left to right. On December 30<sup>th</sup>, 1928 at a session of the Presidium of the State Committee for the new Tatar alphabet (SC NTA) formed by the Central Executive Committee of the Tatar Republic it was decided to render «full assistance in this respect» to the Tatar state publishing house<sup>43</sup>. The new typefaces were introduced immediately.

<sup>38</sup> Modern historiography attempts to reconsider the correlation of the roles of the center and provinces in choosing the alphabet for the Turkic-language peoples of the USSR. For instance, A. Frings, a German researcher, supposes that the central power had to interfere in the question of the choice of alphabet only for the purpose of showing its authority by conceding to one of the competing parties – to Azerbaijan. The support of Kazan – «a dangerous center of Pan-Turkism and local chauvinism» – would amount to «official acknowledgement of the actual leadership of the Tatar party among the Turkic peoples of the USSR» (A. Frings, *Playing Moscow off against Kazan: Azerbaijan Maneuvering to Latinization in the Soviet Union*, «Ab Imperio», vol. 4, 2009, pp. 252 and 261).

<sup>39</sup> Впервые этот документ был опубликован в книге: В. Sultanbekov, *Istoriya Tatarstana* [History of Tatarstan]: *stranitsy sekretnykh arkhivov*, Kazan, Tatar Book Press, 1994, pp. 126-131.

<sup>40</sup> *Ibid.*

<sup>41</sup> TsIK and SNK TSSR Resolution «On Measures for the Tatar Written Language's Latin Print Introducing», 1928, February 8<sup>th</sup> in *Yazykovaya politika v Respublike Tatarstan* [Language Policy in Tatarstan Republic]. *Dokumenty i materilay*. (20-30-e gg.), Kazan, Magarif, 1998, p. 173.

<sup>42</sup> *Ibid.*

<sup>43</sup> Central State Archive for Historical and Political Documentation of the Republic of



Primers in Arabic script, such as M. Fazlullin and G. Nugaybek's *Къъъл jul* (*The Red way*), and G. Timerbulat's *Sovet məktəbe* [*Soviet school*], were speedily reprinted in Latin script. The latter came out in 1927 in Arabic writing<sup>44</sup>, and as soon as next year, in the yanalif<sup>45</sup>.

The «Latinized» Tatar primers were supposed to continue the «Sovietization» of learners, which had been started by the early Soviet primers based on Arabic writing. The unification (Latinization) of the script significantly increased the potential number of readers and the possibility of exposing them to the new Soviet experience. Nevertheless, in spite of the change in the writing system, ideologically, conceptually and in terms of content most primers between the 1920s – 1930s only managed to maintain the tendencies established a decade before that.

For instance, one of the first primers for children in the Latin script was the «Jaņa əlifba» [The new primer] by G. Nugaybek and M. Fazlulla, published in 1928<sup>46</sup>. It was marred by both low-level book typography and stereotypical contents. The degree of politicization of this primer was not high even compared to the ideologically neutral Tatar primers of the 1920s. It did not contain many Soviet symbols either: only V.I. Lenin was mentioned of all Bolshevik leaders, and only November 7<sup>th</sup> – of all Soviet holidays.

In the same year 1928 a primer in Latin script for baptized Tatars was published – it was I.A. Alekseev and A.N. Grigoryev's *Jaņa tormьş* [*New life*]<sup>47</sup>. It was a typical Soviet primer with a picture of Lenin, images of a school, a factory and other attributes of the Soviet reality<sup>48</sup>. Soon the publication of special primers for baptized Tatars ceased: with the introduction of the unified education system and unified writing there was no need for that.

Special emphasis in Tatar primers was still placed on the problems of hygiene and healthcare in the context of the rise in childhood medicalization in the USSR. The «Jaņa il» primer told its readers how dangerous smallpox was by means of a story. It featured a boy named Tazi who was afraid of smallpox vaccination and did not undergo it. Not only did he get ill himself, but he also infected his friend Batyr. Tazi's face was disfigured with pockmarks, and Batyr went deaf<sup>49</sup>. «The day breaks. The sun comes out. Zakiya is cleaning the floor. She is cleaning, but raising a lot of dust at the same time. Some time passed. Zakiya got ill. She stayed in bed. She lay there for a long time. Then Zakiya

Tatarstan, f. 15, op. 2, d. 352, ll. 29-30.

<sup>44</sup> G. Timerbulat, *Sovet mektebe, Alifba*, Moscow, SSSR Nations Central Press, 1928.

<sup>45</sup> Timerbulat, *Sovet mektebe*, cit.

<sup>46</sup> G. Nugaybek, M. Fazlulla, *Yana əlifba* [New Primer], *Balalar ochen*, Kazan, Yanalif, 1928.

<sup>47</sup> I.A. Alekseev, A.N. Grigoryev, *Yana tormysh* [New Life], *Kereshen shkollar ocen əlifba*, Kazan, Yanalif, 1928.

<sup>48</sup> *Ibid.*, pp. 20, 31-32 and 37.

<sup>49</sup> M. Kurbangaliev, G. Sayfullin, *Yana il* [A New Country], *Balalar əlifbasy*, Kazan, Tatizdat, 1930, p. 68.

died. She died from a breast disease. Dust is very dangerous. Beware of dust»<sup>50</sup>. It is difficult to imagine such cruel, «true-to-life» scary stories in a modern-day primer for children. However, when analyzing any text, it is necessary to take into account the specifics of the typical mindset of the given time period and not to forget that people (and children) of that time could think or do differently than their modern-day peers.

The primer also recommended to receive treatment from qualified doctors and never to employ the services of «wisewomen» or witch doctors: «Ulmas is working. He drank some water. The water was cold. Ulmas caught cold. His mother invited a wisewoman». The boy obviously does not get better. Then his mother invites a mullah. The child gets even worse. In ten days he dies of a «tamak bakasy» [tonsillitis]. Then the authors give a warning to the children:

If you have a headache, a sore throat or red rashes on your body, do not go to school, do not distribute your illness. If you feel ill, go to the doctor. Do not go to a mullah, a muezzin or wisewomen (witch doctors). Do not believe them. They are frauds. Religion is poison. Religion poisons workers and peasants<sup>51</sup>.

And:

Vil got ill. His father called a doctor. The doctor came to their home. The doctor examined him. He prescribed a medicine for Vil. Vil took the medicine. 5 days passed. Vil got well. Then Sara's mother said: "If I had invited a doctor, Sara would not have died. I killed my child by inviting a mullah and a 'karchyk'" [wisewoman]<sup>52</sup>.

In real life, however, everything was different. People continued using the tried-and-true folk remedies or employing the services of «im-tomchy»– witch doctors and wisewomen<sup>53</sup>. Often the folk medicine methods would intertwine with religious rites. There were certain rules for attending of the sick, as well as special prayers which were supposed to be pronounced in the case of illness<sup>54</sup>. This demonstrated not so much the backwardness of the population but a long-standing tradition<sup>55</sup>.

The theme of children's health was raised in the primers for older learners as well – for example, in the primers for teenagers. The «Jaŋa il. Jaŋysmerlär alifbası» [The New Country. A Primer for Teenagers], 1932] by V. Burnash

<sup>50</sup> *Ibid*, p. 74.

<sup>51</sup> *Ibid.*, pp. 99-101.

<sup>52</sup> *Ibid.*, pp. 101-102.

<sup>53</sup> *Tatary Srednego Povolzhyya i Priuralya* [Middle Volga and Ural Tatars], Moscow, Science, 1967, pp. 337-338.

<sup>54</sup> *Islam yolalary* [Muslim Customs], «Idel» [«The Volga»], nn. 1-2, 1992, pp. 41-45.

<sup>55</sup> Even in the 1940s and 1950s a lot of Tatar village women preferred to seek medical help from wise women (L.A. Korolyeva, A.A. Korolyev, *Tatary-musulmane Srednego Povolzhyya v 1940-e – 1980-e gg.* [Middle Volga Tatar Muslims in the 1940s – 1980s], «Oykumena», vol. 2, 2009, p. 120).

and G. Distanov, for instance, was specifically compiled for learners aged 12-15<sup>56</sup>. They often had to take care of their younger brothers and sisters, which is why the primer included texts instructing them on that topic. One of them, titled *The wishes of little children*, was narrated in the first person, i.e. from the baby's point of view:

If I could speak, I would say:

- Do not kiss me on the lips!
- Do not spit into my mouth or face!
- Do not give me to mullahs, witch doctors and wisewomen. Otherwise I can get sick, become weak or die.

Protect me from measles, scarlet fever and scrofula.

- Do not pass me around from one pair of hands into another. Be careful when you get me seated or take me in your hands.
- Do not give me "imezgech" (supplementary food for a baby wrapped in gauze fabric - A.S., D.G.). See to it that I do not put my fingers into my mouth.
- Do not bring me to other people's homes. Otherwise I will grizzle a lot and I won't sleep.
- Do not give me tea, coffee, beer or vodka to drink.
- Only then I will grow up healthy and strong and become a fighter for the revolution<sup>57</sup>.

It is natural that at the period under review there was a lot of special medical educational literature too, but most of it came out in Russian. The Tatar primer, thus, made up for what was absent.

Nevertheless, there were some changes in the structure and content of the primers in the Latin script. For instance, in the context of the fast industrialization of the country, primers not only taught reading and writing but also the basics of mathematics. Many of the mathematical problems included in primers were adequate to the realities of that time: «My father gave me one ruble and told me to buy some sugar and matches at the cooperative shop. I bought tea for 60 kopecks and sugar for 20 kopecks. How much change did I get?» But why didn't he buy matches after all? «Once Salima didn't go to school because her stockings had worn off. We decided to buy stockings for her. We collected 50 kopecks in our class, and 30 kopecks in the other class. How much money did we collect in total?»<sup>58</sup>. The «international» theme was also present in the problems: «There are 2 Negroes, 3 Uzbeks, 3 Hindus. How many of them all in all?; There are 2 Germans, 4 Polish men, 4 Frenchmen. How many are they in total?»<sup>59</sup>.

Practically all Tatar primers of the early 1930s were illustrated. Some pictures showed the outcomes of Socialism-building in the city and in the country. One of such achievements was the gradual formation of the new Soviet holiday culture. This is why a special emphasis in the pictures was placed on

<sup>56</sup> V. Burnash, G. Distanov, *Yana il* [A New Country]. *Janymerler nyzmerler alifbasy*, Kazan, Tatizdat, 1932, p. 3.

<sup>57</sup> *Ibid.*, pp. 191-192.

<sup>58</sup> Timerbulat, *Sovet mektebe*, cit., pp. 55-56.

<sup>59</sup> *Ibid.*, p. 56.

the illustrations concerning new, Soviet holidays: May 1<sup>st</sup> or November 7<sup>th</sup>. All of these pictures were bright, gaudy, attractive and were accompanied by texts that described them.

In G. Kurbangaliev and G. Sayfullin's *Jana il* the October revolution day celebrations in a collective farm [kolkhoz] are described in first person from the point of view of a child participant.

The October holiday has come. We have been preparing for it. We came out in the streets with red flags. There we listened to the words of truth. In October workers and peasants received their freedom. We shouted out: 'Long live October! Say no to religious holidays! Hooray!' We are the children of October. We are Young Pioneers. We are following in grandpa Lenin's footsteps<sup>60</sup>.

The illustration to this text showed boys and girls marching in unison with a banner saying «Long live the Red October!», a flag and a drum. Star-shaped badges were pinned on their chests. They were dressed in traditional clothes, with bast shoes on their feet.

Authors of the primers clearly preferred texts about the «Red October», although texts devoted to other Soviet holidays would sometimes appear as well. For instance, some primers included materials devoted to the widely respected January 9<sup>th</sup> (the «Bloody Sunday» of 1905) – the day when a peaceful demonstration of St. Petersburg workers who were going to present a petition to Nicholas II was gunned down by the Tsar government. In G. Timerbulat's *Sovet məktəbe* primer (1928) there is a story of the «difficult» situation of the workers who decided to tell the Tsar about it. «Grandpa Lenin» had warned them: «You can't trust the Tsar», but they did not listen: «The soldiers were firing at them. The whole street was covered with blood. Many people died, including women and children. This was the Tsar's order. After that he was not trusted anymore. When they found out that he sided with moneybags, they tried to overthrow him»<sup>61</sup>. So, the textbooks for the youngest children contained not only open ideological and anti-religious propaganda but also some information on the history of the revolutionary movement in Russia.

In terms of contents, the late 1920s-1930s primers were very much like their earlier Soviet predecessors. The traditional lifestyle, agriculture, school were still primary themes for these books, but the contents of the stories and the pictures illustrating them were quite removed from actual reality, essentially representing only the desired dream of tomorrow. The collective farms as shown on the pages of the primers featured a variety of agricultural equipment, good schools, kindergartens and shops. This did not match the reality of the Tatar village of that time. The actual life saw the forceful collectivization of agriculture, dekulakization and the countrywide confiscation of seeds from villages. The rural

<sup>60</sup> Kurbangaliev, Sayfullin, *Jana il*, cit., p. 80.

<sup>61</sup> Timerbulat, *Sovet mektebe*, cit., 1928, pp. 35-36.

population of the Tatar Republic suffered from a severe shortage of provisions almost to the point of starvation<sup>62</sup>.

Some illustrations which reflected the new Soviet life were passed on from one primer to another – but while the characters and general storylines remained the same, emphasis could be placed on different things. This can be seen on the example of the two editions of the «Jaja il» [New Country] primer by M. Kurbangaliev and G. Safullin (the 1930 and the 1931 editions). The 1930 edition opened with a rather traditional picture for this sort of textbooks – the image of a family at home. All members of the family are busy in their usual ways: the father is fixing a horse collar, the mother is sewing, the children (there are three of them) are playing. But the indoor environment for these everyday, trivial happenings is absolutely new. A portrait of Lenin can be seen on the wall in the foreground, the room itself is furnished with European-style furniture. At the same time all the members of the family are dressed in traditional clothes, and the woman is wearing bast shoes. As a result the whole picture looks like some sort of a frame-up, when the village family is randomly inserted into the «strange», «urban» and openly «Soviet» environment. It is clear that the author of the picture intentionally tried to show the modernization and Sovietization of the Tatar rural lifestyle, but it came off awkward<sup>63</sup>. The image of the «new lifestyle» would scare away or irritate rural readers instead of attracting them, it would look like an attempt at a forceful Europeanization, traditionally associated with Russification. In the 1931 edition this «mistake» was corrected. The very same family was returned to its previous conditions – a small rural house with no wall paintings, no European-style furniture and no electricity<sup>64</sup>.

### *Conclusion*

The 1920s was the time of bold exploration and daring experiments in the education sphere. Political, institutional and methodical aspects of teaching reading and writing to various categories and groups of people regardless of their gender, age, nationality, religion and social status, were drastically emphasized. In the course of the reforms, the issue of eliminating the shortage of primers and expanding their educational, political and propagandist functions came to be seen as one of the most important problems. The new Soviet primers were created on a fundamentally new ideological basis, which allows us to speak about the certain «primer revolution», when the primers themselves changed

<sup>62</sup> On this see, e.g.: I. R. Tagirov, *Ocherki istorii Tatarstana i tatarskogo naroda* [Essays on Tatarstan and Tatar Nation History (the XX<sup>th</sup> Century)], Kazan, Tatar Book Press, 1999, p. 276.

<sup>63</sup> Kurbangaliev, Sayfullin, *Yana il*, cit., 1930, p. 7.

<sup>64</sup> *Ibid.*, 1931, p. 3.

(although the change was not immediate). The Bolshevik revolution of 1917, with its results and consequences, also came to hold an important place – in fact, the main one – in the primers.

Above all, the most characteristic feature of the Soviet Tatar primers for children in the early and mid-1920s was their vast diversity. Both new and significantly altered prerevolutionary editions co-existed at the same time. All of them were printed in the Arabic script, but they differed in structure, contents and design, which could be explained by the specifics of their target demographic (for example, baptized Tatars) and orientation on certain methods of teaching reading, or different authors, or different publishing equipment. Although the Soviet symbols and propaganda texts were always present in these primers, on the whole they were still less Sovietized than their Russian-language equivalents. Traditional patriarchal values were still very prominent, which could possibly be explained by the attempts to maintain and emphasize the ethnic specifics of these books. At the same time these primers did not show any effort to discover or intentionally emphasize the stereotypical features of the Tatar national character, or to compare them to the Russian character.

The conversion of the languages of Turkic peoples of the USSR, including Tatar, to yanalif was an extremely large-scale and daring experiment of the Soviet authorities. It began together with the emergence of the «hot», «dynamic» Soviet Culture 1. It was the culture which was not afraid of experimenting, which is why many reforms in the life of Soviet society were attempted, as risky or unpredictable as they sometimes were. The «script revolution» that happened at that time became a sort of continuation of the political revolution. It was accompanied by many romantic revolutionary slogans and ideas typical for Culture 1. By getting rid of the «outdated», «religious» Arabic script, Turkic peoples of the Soviet Russia were supposed to say goodbye to all «regressive», «dated», «counterrevolutionary», «parochial» things related to it, and to dash forward to the bright communist tomorrow, armed with the «progressive», «international» Latin writing. Tatar primers based on the Latin alphabet were constructed in complete accordance with these attitudes and rules.

In the late 1920s – early 1930s the variety of primers was still there, but the Sovietization of Tatar primers becomes much more evident. The Soviet discourse begins to hold a more prominent place in the “Alifba” by gradually replacing the ethnic discourse. It becomes more aggressive, sometimes manifesting itself openly (like, for instance, in the forms of Soviet holiday culture representation) and sometimes appeared in covert and latent forms (like, for instance, in the medicalization of childhood culture as a part of the Soviet «culturalization» of the masses). Tatar primers now obviously served the single national task of implanting the new Soviet ideology into the minds of young citizens of the USSR, because children’s memory firmly grasped and safely stored all the things that they read in their alphabet books. After all, the primers often were the first books they read in their lives.

# Education in international congresses (late nineteenth century to early twentieth century)

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**ABSTRACT:** From the mid-nineteenth century to the early twentieth century, Professional Congresses sprang up in several countries. This article situates these events in the Universal Exhibitions and in Latin America, then to treat the specialties and social policies, especially in relation to childhood. It investigates the meaning of these encounters, locates them historically and questions the description that these congresses were essentially scientific activities, or even a practice begun by scientists, but reverberating into other spheres. The experts gathered to deal with proposals and standards for policies, legislation and social institutions, to organize the modern state and configure idealized urban societies and their institutions. Education had gained prominence as a factor in building the modern society. The circulation of ideas involved people engaged in intellectual functions, as well as ideas spread to the population at large, for whom the new products, institutions and cultural patterns would be designed.

**EET/TEE KEYWORDS:** National education system; Social institutions; Latin America; XIX-XX Centuries.

From the mid-nineteenth century to the early decades of the twentieth century, Professional Congresses, often held within International Exhibitions, sprang up throughout several countries, including Brazil.

This article briefly introduces these congresses and analyzes their place within historical processes, particularly as regards to Brazilian society. It investigates their meanings, locates them historically and questions the description that these congresses were essentially scientific activities, or even a practice begun by scientists, but reverberating into other spheres.

To this end, the article will situate these events in the Universal Exhibitions and in Latin America, then to treat the specialties and social policies, especially in relation to childhood. The analysis of the meaning of the encounters and the processes in which they are embedded, in the framework of international, political and economic relations, enable us to state that beyond being connected to the production of specialized knowledge, the congresses were political activities that legitimized the models and criteria of integration into the so-called «concert of civilized nations». The congresses may be seen as one way in which ideas circulated, occurring both nationally and internationally, alongside other modalities such as the setting-up of scientific, political or religious associations, or the dissemination of the general and specific press, involving a wide range of sectors of society<sup>1</sup>.

### *Congresses within Universal Exhibitions*

There is a close link between the scientific congresses and the Universal or International Exhibitions that took place after the 1851 Great Exhibition of London, and continued into the twentieth century. For the present study, we will highlight the Exhibition held in Rio de Janeiro in 1922 to celebrate the Centenary of Brazil's Independence<sup>2</sup>.

The Universal Exhibitions were a space for scientific and technological dissemination intended for the public at large (not to mention ideological and commercial messages). The congresses were important elements in this scientific dissemination. They were announced and celebrated as notable events promoted during exhibitions, as well as by the organization of parallel themed exhibitions and the setting-up of museums, which were spin-offs of the larger events.

World's fairs performed a hegemonic function precisely because they propagate the ideas and values of the country's political, financial, corporate, and intellectual leaders and offered these ideas as the proper interpretation of social and political reality<sup>3</sup>.

According to Plum, the first foundations for international cooperation among professionals were laid in the Great Exhibition in London in 1851, and were institutionalized over the following decades. Comparison between different nations' output and producers drove the design of new methodological

<sup>1</sup> M. Kuhlmann Jr., *Congressos Profissionais no final do século XIX e início do século XX: ciência e política*, in A. Heizer, A.A. Passos Videira (edd.), *Ciência, civilização e república nos trópicos*, Rio de Janeiro, Mauad, 2010, pp. 179-198.

<sup>2</sup> Id., *As Grandes Festas Didáticas: a Educação Brasileira e as Exposições Internacionais, 1862-1922*, Bragança, Paulista, Edusf, 2001.

<sup>3</sup> R.W. Rydell, *All the World's a Fair: Visions of Empire at the American International Expositions, 1876-1916*, Chicago, The University of Chicago, 1984, p. 3.



procedures. One meaningful result of this exhibition was the creation of international comparative statistics; Belgian naturalist, Lambert Adolphe Jacques Quételet (1796-1874) was appointed as a member of the international jury and prepared the International Statistics Congress, which brought together statisticians from several countries, and its first edition was to be held two years later in Brussels<sup>4</sup>.

Scientific interpretations of social and natural phenomena were becoming increasingly authoritative, and the planners of the international exhibitions promoted the prestige of this science. Brazil's representative at the London International Exhibition (1862), Councilor Carvalho Moreira, considered it «an encyclopedia in action»<sup>5</sup>. In the *First Draft of a System of Classification for the World's Columbian Exposition* (Chicago, 1893) G. Brown Goode wrote that it would become an «illustrated encyclopedia of civilization»<sup>6</sup>.

The holding of congresses simultaneously with exhibitions was boosted in 1878, in Paris, when engineer Thirion was tasked with organizing these meetings on a range of scientific specialties and other matters such as agriculture, industrial property, the arts, literature, and poetry. In 1889, in Paris, the Universal Exhibition to celebrate the centenary of the French Revolution hosted more than 60 congresses on a range of topics, including: Criminal Anthropology, Ethnographic Sciences, Electricity, Celestial Photography, Hydrology and Climatology, Hygiene and Demographics, Veterinary Medicine, Meteorology, Marine Works, Unification of Time Zones and Zoology.

The cultural strength of the fair increased in 1893 in Chicago by a series of international congresses to discuss religion, labor, women's issues and other important topics of the day. At the 1904 Louisiana Exhibition, a series of international congresses brought together the leading scientists and men of letters of the United States and the world, including Max Weber, Henri Poincaré, William Rainey Harper and Hugo Münsterberg<sup>7</sup>.

While the congresses associated themselves with international exhibitions, specific exhibitions on a given topic also occurred, either in tandem with congresses, or not, as in London in 1884, when the International Exhibition of Hygiene and Education took place.

<sup>4</sup> W. Plum, *Exposições Mundiais no Século XIX: Espetáculos da Transformação Sócio-cultural*, Bonn, Friedrich-Ebert-Stiftung, 1979, pp. 83-84.

<sup>5</sup> M. de Souza Neves, *As vitrines do progresso*, Rio de Janeiro, Depto. História, PUC-RJ, 1986, p. 41.

<sup>6</sup> Rydell, *All the World's a Fair: Visions of Empire at the American International Expositions, 1876-1916*, cit., p. 45.

<sup>7</sup> *Ibid.*

### *Congresses in Latin America*

In Latin America, congresses were also held during exhibitions, beginning in 1882 at the Continental Exhibition of Buenos Aires, when the International Pedagogical Congress was held. In Brazil, during the Industrial Exhibition of 1881 it was determined that should have an attempt to hold a Congress of Instruction in Rio de Janeiro, in 1883. The proposal for this Congress had goals closely imitated that of the International Congress of Instruction, in Belgium in 1880<sup>8</sup>. However, due to difficulties with funding, the event did not take place, although a book was published containing contributions commissioned from specialists on a range of matters. The organizing committee did, even so, manage to hold a pedagogical exhibition with material from a number of countries and a range of lectures on educational matters. The books, devices and pieces of furniture exhibited were the foundations for the setting up of the National School Museum [Museu Escolar Nacional], which was inaugurated in the same year in Rio de Janeiro<sup>9</sup>.

To coincide with the celebrations in 1900 of the fourth centenary of Brazil's Discovery, the Congress of Medicine and Surgery [Congresso de Medicina e Cirurgia], the Congress of Engineering and Industry [Congresso de Engenharia e Indústria], and the American Legal Congress [Congresso Jurídico Americano] were held. During the exhibition to celebrate the centenary of the opening of the ports in Rio de Janeiro in 1908, there was at least one Congress on public and private welfare. Organized around the exhibition to celebrate the centenary of Brazil's independence, in Rio de Janeiro in 1922, thirty congresses were held, beginning in 1921 with the Interstate Conference on Primary Education.

Congresses assumed greater importance in the Americas at the beginning of the twentieth century. However, there was no cooling-off of such meetings in Europe, where a large number of them continued to take place. For example, one can mention the International Congress on Criminal Anthropology in Amsterdam (1901) and in Turin (1906); the Child Congress in Liège (1905); the International Congress on Child Nutrition [Gouttes de Lait] in Paris (1905) and in Berlin (1911); the Congress on Occupational Health in Milan (1906).

In the case of the Americas, there were congresses in which the United States took part, such as the Pan American Medical Congress in Washington (1893), as well as those bringing together only Latin American countries, such as the Latin American Scientific Congress – *Congresso Científico Latino-Americano*, Buenos Aires (1898); Montevideo (1901), Rio de Janeiro (1905) and the Latin American Medical Congress – *Congresso Médico Latino-Americano*, Santiago (1901); and Buenos Aires (1904).

<sup>8</sup> Moysés Kuhlmann Jr., *Notas sobre o Congresso Internacional do Ensino, Bruxelas, 1880*, «História da Educação», vol. 9, n. 18, 2005, pp. 59-69.

<sup>9</sup> *Relatório da Directoria da Associação Mantenedora do Museu Escolar Nacional*, Rio de Janeiro, E. Leuzinger, 1884, <<http://www.bbk.ac.uk/ibamuseum/facsimils/Leuziner0101.html>> (last accessed: May 31<sup>st</sup>, 2012).

### *Delimitations and convergences among specialties*

Apart from the competition among nations, a range of influences, bodies of knowledge, interests and topics were discussed in international congresses and exhibitions. While postulating primacy in their specificity, none of the competing areas intended to overwhelm the others, but to join forces to build civilized life.

In the late-nineteenth century and early twentieth century in Brazil, there was specialized knowledge, which can be seen in the existing museums and research institutions. From the Higher Education, Engineering, Law and Medicine were the major areas from which sprang the intellectuals who participated in those congresses and in the processes' wherein new fields of specialties and scientific, social and political activity were delimited.

In medicine, an early but fruitless attempt to hold a congress in São Paulo, Brazil occurred in 1878, under the auspices of Doctors Nogueira Cardoso and Cesário Mota, who approved 23 thesis for this meeting. It was the Rio de Janeiro Society for Medicine and Surgery, which held the First Congress in 1888, and again in 1889, 1890 and 1900<sup>10</sup>.

In the opening session at the 3<sup>rd</sup> Latin American Scientific Congress in 1905, Dr. Alfredo Osório said:

No one is more suited to this beneficent and conciliatory mission, to this task of concord and fraternity than we doctors, [...] and it is to doctors who in future, the government of the peoples will fall, because only those who know the philosophy and psychology of the individual will be able to know and guide the collectives<sup>11</sup>.

Mr. Julio de Barros Raja Gabaglia provided an article on legal and social sciences in the book celebrating Brazil's 400<sup>th</sup> anniversary, in which he commented upon the recent specialization of social sciences, alongside development in the sciences, as shown by subdivisions in law, with demarcations that were addressed jointly or separately in the range of teaching systems of different countries:

Thus, from primitive confused notions arise several sciences, which, unfolding and multiplying, have constantly increased the range of human knowledge. At first, we shall find law mingled with other sciences, and subsequently independent of them, and then finally broken down into private and public law, civil, penal, international, commercial, maritime, constitutional, administrative law, and so on, all of which are ramifications of studies

<sup>10</sup> A.J.S. Lima, *As Ciências Medico-pharmaceuticas: parte segunda, 1808-1900*, in Associação do Quarto Centenário do Descobrimento do Brasil (ed.), *Livro do Centenario (1500-1900)*, 4 vols, Rio de Janeiro, Imprensa Nacional, 1900, vol. I.

<sup>11</sup> Congresso Nacional de Assistencia Publica e Privada do Rio de Janeiro, *Assistencia Methodica, Meios Praticos para se Obter uma Aliança entre a Assistencia Publica e a Privada. O Problema no Brasil*, Rio de Janeiro, Jornal do Commercio, 1908, p. 21.

following a single principle and an initial concept of separation, and that have specifically subdivided and interlinked at different points. A careful examination of the multiple issues of public law, supreme among those addressing the economic order and relations of the State with society [...] has given birth to other sciences, called political and economic sciences by some, and moral, political and economic sciences by others, while simply called social sciences by many. [...] Legal, social and political sciences together make up a single great entity. We must reduce them to a synthesis through sociology<sup>12</sup>.

Engineers also saw themselves as leaders of society to implant civilization. At the Engineering and Industry Congress of 1900 [Congresso de Engenharia e Indústria], to celebrate the 20<sup>th</sup> anniversary of the Engineering Club, Mr. Osorio de Almeida, Chairman of the event, gave a speech in which he emphasized the importance of the field:

The science of law provides a firm foundation for the principles of order and justice; Medicine discovers the laws for preserving the individual. Although, it is Engineering and Industry that provide the former with the force that is the sanction of law, and the latter with the means to protect against the destructive action of natural forces and even turn them into factors for the comfort and well-being of mankind<sup>13</sup>.

During the opening session for members of the sections of engineering, physical sciences, mathematics, and natural sciences at the 3<sup>rd</sup> Latin American Scientific Congress in 1905, at the headquarters of the Engineering Club, Mr. Castro Barbosa affirmed that within «this constant and wonderful progress the engineer may feel justifiably proud». The same tone was taken by Carlos Wauters, on his speech on behalf of new members:

Nothing may be obtained from nature hastily without the factor of adequate cause. The new Latin nationalities of America could not suddenly wake up to the fecund, tranquil life of lettered peoples, and political emancipation could not in itself lead to intellectual emancipation.

We engineers must be the forerunners of this emancipation because our science is for application, and to intend to seek it in the fields of high scientific speculation, in our current circumstances, would be to try to achieve the impossible<sup>14</sup>.

Jurists, engineers and doctors vied for privileged positions to lead «the government of the peoples», but their interests converged through shared participation in societies and associations as well as through taking part in areas

<sup>12</sup> J. de Barros Raja Gabaglia, *As Ciências Jurídicas e Sociais*, in Associação do Quarto Centenário do Descobrimento do Brasil (ed.), *Livro do Centenario (1500-1900)*, cit, vol. 3, pp. 3-4.

<sup>13</sup> B.F. Ramiz Galvão, *Memoria Historica dos Trabalhos da Associação do Quarto Centenario do Descobrimento do Brasil*, in Associação do Quarto Centenário do Descobrimento do Brasil (ed.), *Livro do Centenario (1500-1900)*, cit., vol. 4, p. 352.

<sup>14</sup> Terceira Reunião do Congresso Científico Latino-Americano, *Actos solemnes, visitas e excursões*, Rio de Janeiro, Imprensa Nacional, 1909, vol. VIII, p. 122.

concerning social policies, which were being delimited, such as occupational health and education.

This coexistence occurred in borderline areas, such as the chair in Public Medicine, mentioned by Mr. Raja Gabaglia, which existed in Brazilian Law courses. In the 1905 Scientific Congress, Public Medicine organized itself as a specific section, but its minutes and annals were published as an attachment to the section of medicine. Communications of this section were related to the interface between Medicine and Law, concerning issues of public health, hygiene, and welfare, deriving from issues stemming from urban development, and having to do with innovations, such as ambulances for transporting sick people, or care for the dead. There was also a sociological communication inspired by the so recent work of Durkheim on suicides, and which investigated the phenomenon in the city of São Paulo. Sociology was linked to Law, in congresses such as in 1905, with the section on legal and social sciences, or in 1922, at the First Brazilian Childhood Protection Congress, in the section of Sociology and Legislation.

### *Congresses and social policies*

In regard to the intervention in the area of welfare, at the opening session of the 4<sup>th</sup> Latin American Medical Congress in Rio de Janeiro in 1909, Dr. Azevedo Sodré, chair of the Organizing Committee, referred to the interaction among different areas to investigate issues related to poverty in modern society:

Gentlemen, you will agree that we were not ill-advised when we expanded the fourth section, dedicated to hygiene and public welfare. I hardly know of more momentous issues that could lend themselves more to internationalism than those concerning these two great branches of human knowledge, rooted in the soil of medicine and sociology. Regarding Public health, all peoples share solidarity, we all depend on each other. [...] Protection against misfortune, in whichever of its countless and multifarious aspects, is not a purely medical matter; however, given the eminently social character of modern medicine, this topic challenges our attention. Both because in a confrontation with hygiene, psychology, morality and sociology, the issues with which it has to do are not addressed by those with a sound knowledge of human structure, and also because they have to deal with our professional duties: to aid those who suffer or who may come to suffer. It is surely a great deal to fight disease in each isolated individual; it is, even so, unarguably much more to combat the evils that afflict the community.

He then reaffirmed the would-be preponderance of the medical sector to lead a definition of proposals to enhance welfare:

Who better than we doctors, then, to raise the banner of legitimate protection for the victims of misfortune, we, who in the bustling affairs of professional life always keep alive and

vibrant with the spirit of altruism, we, who far from hardening our souls in our dealings with poverty, become increasingly sensitive to the sufferings of others? It, therefore, behooves us to strive, with our best efforts, to improve, extend and complete the processes of public and private welfare, a welfare exercised under as many modalities as there are variations in conditions that demand it, welfare that must be perfectly egalitarian, that smacks neither of charity nor of favor, but is rather a just claim for a right that a society has deferred, a society that too early forgot the sublime lesson of the Nazarene and still intends to be ruled by the law of mutual assistance that we all owe each other.

Dr. Azevedo Sodré concluded this part of his speech by addressing the need to formulate social policies and the role of the State, for which the Medical Congress resorted to legal expertise through an invitation to specialists from that area:

However, all of these countless problems of public and social prophylaxis, of welfare under its range of shapes, that are on the order of the day in our affairs, are intimately subordinated to and directly depend on an essential, primordial question which has never been debated in these assemblies. Nevertheless, owing to its extreme importance, because of the consequences resulting from it, should be compared to the pinnacle of the dome of a great building. I refer to State intervention in hygiene and public welfare, to the role the State must play, and to how and how far it must intervene, respecting or even confronting individual and collective freedoms. The study of such a momentous matter, entrusted by us to three of Brazil's most respected jurists, and the resulting debate, will certainly contribute to the success of our event<sup>15</sup>.

The congresses did not merely bring together scientific specialties, but were organized as themed events, such as the case of industrial property, or those concerning international agreements on weights and measures, on the unification of time zones, on child protection, and so on.

There were even religious congresses, which the Church increasingly saw as an option to organize its militants in its struggle against the State, for example, the Catholic congresses held in Spain between 1889 and 1902. In Brazil, one may mention the Catholic Congress of Bahia (1900), the Diocesan Catholic Congress of São Paulo, (1901, 1905, 1911), the Eucharistic Congress of São Paulo (1915), and the National Eucharistic Congress of Rio de Janeiro, held in 1922 during the Centenary Exhibition. These events were one way in which the Church found a breathing space to regroup as a political element. Religious teaching and welfare, in their several modalities, were the privileged fronts of operations. In 1900 Father Julio Maria, a Law Ph.D., apostolic missionary, as well as member of Brazil's Historical and Geographical Institute [Instituto Histórico e Geográfico do Brasil], wrote:

<sup>15</sup> Quarto Congresso Médico Latino-Americano, *Actas e Trabalhos*, Rio de Janeiro, Imprensa Nacional, 1909, pp. 64-66.

The State cannot intend to run such complex and such delicate operations as education, health, the fate of orphans, convicts, abandoned children, the Army, or the Navy while recklessly dispensing with the most ancient and most active force that is known – religion. [...] Fortunately, it seems that these ideas are holding sway, if not in all at least in some of the leading representatives of Brazilian policy and clergy<sup>16</sup>.

### *Childhood protection*

Congresses promised the prospect of the organization of the modern state, and models were put forward for urbanized society and its institutions. Childhood as well as the medical, welfare, and educational attention reserved for childhood to arise as one of major theme mainstreaming all areas. Education – both what it is and what it is not, as well as what it means and produces – began to be located as an important factor for structuring «modern» society.

The idea of holding congresses dedicated to childhood arose in Antwerp, Belgium, in 1894, and was repeated in Brussels (1895) and Liège (1905). Furthermore, in 1905, the First International Child Nutrition [Gouttes de Lait] Congress was held in Paris; the second was in Brussels in 1907, when the International Union for the Protection of Early Childhood was formed; and the third was held in Berlin in 1911.

The First Child Congress was held in Belgium in July 1913. Brazil, invited by the Belgian government, neither sent representatives nor the requested information, but Dr. Arthur Moncorvo Filho, physician and director of the Rio de Janeiro Institute for Child Protection and Assistance, and Dr. Alfredo Ferreira de Magalhães, a physician from Bahia, who played a major role in this field in the early twentieth century, both took part.

American Child Congresses were held from 1916 onwards, as part of the celebrations of the centenary of Argentinian Independence in Buenos Aires, and nine editions were held up until 1948. The second was in Montevideo in 1919. The third was held during the Exhibition of 1922, along with the First Brazilian Childhood Protection Congress. These meetings focused strongly on education among topics pointed out, and brought together a broad spectrum of social forces, identified by Dr. Alfredo Ferreira de Magalhães, in the 1916 meeting:

The First American Child Congress was not a congress on pediatric clinical practice, as many might think. It was not only physicians who met, exchanged ideas and debated there, but also lawyers, jurists, politicians, secondary school teachers, teacher trainers, professional

<sup>16</sup> J. Maria, *A Religião, Ordens Religiosas. Instituições Pias e Beneficentes*, in Associação do Quarto Centenário do Descobrimento do Brasil (ed.), *Livro do Centenario (1500-1900)*, cit., vol. 1, pp. 112-113.

education workers, directors of the protection associations of children, youths and the elderly, men women and unmarried women, many of whom didn't show a low degree of intellectual and social culture<sup>17</sup>.

The First Brazilian Childhood Protection Congress was held simultaneously with the Third American Child Congress during the celebrations of the centenary of independence. Preparations for it had been underway since July 1919, but it had been postponed several times until the decision was taken to merge the two meetings. Over 2,600 members from 21 States of Brazil enrolled, and official delegations came from 17 American countries: Argentina, Bolivia, Chile, Colombia, Costa Rica, Cuba, Equator, Guatemala, Mexico, Nicaragua, Paraguay, Peru, Panama, San Salvador, the United States, Uruguay and Venezuela. Italy also sent a representative. The goal of the meeting was to deal with «all matters that directly or indirectly refer to children, both, in general, from the social, medical, pedagogical, and hygienic point of view, and, in particular, in their relations with Family, Society, and the State»<sup>18</sup>.

The Congress was divided into 5 sections: Sociology and Legislation (above all in regard to the family and the community); Welfare (in regard to pregnant women, mothers or nursing mothers, and to infants and young children); Pedagogy (particularly in relation to child psychology and to physical, moral and intellectual education, including professional education); Infant Medicine and Pediatrics (general, surgery, orthopedics and physiotherapy); Hygiene (eugenics, private hygiene in infancy and early childhood, the study of infant nutritional chemistry, public hygiene, particularly communities, and above all school hygiene).

The Sociology and Legislation section focused legal matters (criminal and labor legislation), cultural matters (the influence of cinema and theater, child prostitution) and educational institutions. The Welfare section dealt with child protection measures, with several accounts from institutions from all over the country. The Pedagogy section comprised communications on development and learning, curricula, moral, popular education, religious education, and pedagogical methods. The Medicine section dealt mainly with specifically medical topics, while Hygiene section focused on issues such as alcoholism, eugenics, health education and school hygiene.

Education was given a privileged space, and was a catalyst for proposals on childhood, although in that Congress issues on health and hygiene also stood out. The Pedagogy section was one of the busiest in terms of the number of papers enrolled, and there were interventions for educational issues in all sessions, except for that of Childhood Medicine. In the Sociology and Legislation

<sup>17</sup> A.F. de Magalhães, *De Regresso do 1º Congresso Americano da Criança*, Salvador, Almeida, 1918, p. 6.

<sup>18</sup> Congresso Brasileiro de Protecção á Infancia, *Boletim 6: 1921-1922*, Rio de Janeiro, Imprensa Nacional, 1924, p. 78.



session, the debate on childhood legislation and the role of the judicial branch was associated with educational institutions for abandoned children, while moral education was emphasized both within such institutions and from the point of view of the customs of urban life. In the Welfare section, a relationship could be found between educational institutions for poor children, social policies and moral education. There were also accounts of the experiences from several social entities in Brazil, many of them with educational institutions. In the Hygiene section, the relationship between health and education in social policies was reaffirmed, and specific aspects of school hygiene were discussed.

Relations among different sectors were wide-ranging, and this can be seen in the composition of members of the Congress as well as in relations surrounding the meetings. A leading category among members enrolled at the Brazilian Child Protection Congress, that of honorary members, shows privileged recipients of demands from the meeting, involving people from the Federal and State levels of government. The other category, effective members, came to 2,632, including individuals and institutions. An enrollment fee was charged, which favored this arrangement, and explains the presence of unexpected names such as sports clubs, associations and Masonic lodges. Those enrolled showed a range of educational backgrounds and areas of involvement: professors and students from medical colleges, physicians, pharmacists and dental surgeons. Those with a background in law included politicians, judges, the chief of police, and the representatives of various entities. Those working in education included school directors and teachers. The wide-ranging list of professions among those enrolled demonstrates the scope of social sectors involved: mayors, civil servants, architects and builders, civil engineers, military engineers, Navy officers, agronomists, ranchers, farmers, traders, capitalists, industrialists, proprietors, journalists, accountants, and publicists. Most religious people were Catholic, but there were representatives of Protestant denominations and there is one communication from a Spiritualist Association. Although most attendees were male, there was a significant female presence. This demographic breadth of scope shows both the network of relations of the organizers of the event and the social acknowledgment of the importance of the matter, going beyond those working directly with children<sup>19</sup>.

<sup>19</sup> M. Kuhlmann Jr., *A Circulação das Idéias sobre a Educação das Crianças: Brasil, Início do Século XX*, in M. Cezar de Freitas, M. Kuhlmann Jr., *Os Intelectuais na História da Infância*, São Paulo, Cortez, 2002, pp. 459-503.

### *Congresses and their meanings*

In the documentation related to the congresses, one nearly always finds manifestations, generally during the opening or closing sessions, proposing a reflection on the importance of these meetings and their goals.

At the opening of the 1922 Exhibition, Brazilian President Epitácio Pessoa's address to the ambassadors of friendly nations, deemed «a glorification of the grandeur of Brazil», showed a progressive optimism, in which congresses were taken as proof of Brazil's progress:

The scientific, historical, artistic and economic congresses that you will attend, just as you might attend this Exhibition in which we seek to summarize certain aspects of our intellectual culture, and of the produce of our lands and factories [...] will suffice to persuade you that something has been done – though much remains to be accomplished – to build the future, after this difficult step of the first century of emancipated life<sup>20</sup>.

At the 1908 National Public and Private Welfare Congress [Congresso Nacional de Assistência Pública e Privada] in Rio de Janeiro, jurist Ataúlfo de Paiva, a judge of the Rio de Janeiro appeal court, stated:

And scientific congresses, much maligned recently, are still and will remain the most appropriate vehicle civilization has produced in order to proclaim ideas, principles and programs worthy of nations' admiration<sup>21</sup>.

At the opening ceremony of the 1900 Engineering and Industry Congress, Mr. Ramiz Galvão spoke on behalf of the Fourth Centenary of the Discovery of Brazil Association [Associação do Quarto Centenário do Descobrimento do Brasil], to register his

profound gratitude for having wished to associate itself with the celebrations of Brazil's Jubilee. And, gentlemen, I use the term celebrations advisedly, because in these august assemblies of science just as in the heyday of the Hellenic people, the heart of the Fatherland is gladdened by the proof of the talent and vigor of its sons, [and] applauds the victors of the jousts of knowledge<sup>22</sup>.

When mentioning the 4,160,000 visitors to the 1884 International Health Exhibition in London, the rapporteurs of the Brazilian Commission stated:

<sup>20</sup> Exposição do Centenário do Brasil, *Livro de Ouro: Commemorativo do Centenario da Independência do Brasil e da Exposição Internacional do Rio de Janeiro*, Rio de Janeiro, Anuario do Brasil, 1923, p. 363.

<sup>21</sup> Congresso Nacional de Assistencia Publica e Privada do Rio de Janeiro, *Assistencia Methodica, Meios Praticos para se Obter uma Aliança entre a Assistencia Publica e a Privada. O Problema no Brasil*, cit., pp. 5-6.

<sup>22</sup> Ramiz Galvão, *Memoria Historica dos Trabalhos da Associação do Quarto Centenario do Descobrimento do Brasil*, cit., p. 361.

If, when visiting it, most of the public sought only the pleasure of a stroll through the gardens, or in its galleries, the pleasure of music, encounters with friends, contemplation of the elegant part of society; if it was for one class a source of profit, while for another a pastime and recreation; nonetheless, its importance is undiminished, and the advantages flowing from it unmitigated. It is enough that from this entertainment, the public acquires a little hygiene, and that the least attentive and most reluctant observer obtains some small knowledge, a minor lesson that with time shall yield fruit. Nonetheless, if it were only fruitful for a limited number of people, namely those who attend it in order to inform themselves and seek encouragement for further studies on hygiene and education, this would be enough<sup>23</sup>.

From the point of view of spreading knowledge and disseminating procedures suitable for hygiene, the report shows that even indirect influences on the public at large are deemed possible. Alongside this, the dimension of a necessary exchange by the interested parties is highlighted. This shows that the circulation of ideas involved specific social relations among people exercising intellectual, administrative and political roles in different institutional positions. At the same time, ideas were spread within the framework of a broader dissemination to the population at large, wherein an attempt was made to incorporate new products, institutions and cultural models to social practices.

At the opening of the International Congress of Instruction in Brussels (1880), Mr. Couvreur, Chairman of the Executive Commission, said that if the new ideas were to be accepted and adopted, they would have to penetrate the masses, and not only be taken up by a few spirits. Congresses possess the merit of allowing these ideas to arise, and become consolidated in the clash of contradictions. Thanks to congresses, observation could step out of the pages of books and occur in the light of the day, in the open forum, instead of moldering in libraries, academies and administrations. And thus, ideas would eventually be adopted by public opinion and impose themselves on lawmakers: «congresses are one of the most useful forms of *self-government*. They prepare the laws»<sup>24</sup>.

At the same meeting, Mr. Midosi, the Portuguese delegate, was applauded when he said that he was deeply persuaded of the usefulness of such meetings, not only in order to see for himself the state of instruction in different countries, but also to exercise a great influence on relations and life in different nations, in the struggle against the common enemy, ignorance. In congresses, one could find perfect freedom of discussion, perfect equality of rights, and complete fraternity among all its members: «literary congresses will bring about a true universal Republic»<sup>25</sup>.

<sup>23</sup> Comissão Brasileira na Exposição Internacional de Higiene e Educação, *Trabalhos da Comissão Brasileira*, Rio de Janeiro, Imprensa Nacional, 1884, pp. 26-27.

<sup>24</sup> Congrès International de l'Enseignement de Bruxelles, *Discussions*, Bruxelles, L'Office de Publicité, 1882, pp. 10-11.

<sup>25</sup> *Ibid.*, 54.

International relations shine through as one of the existing concerns in holding congresses, which is why diplomatic efforts were made to have them. The idea of harmony was preached, which would set the prevailing tone at such meetings, and, which would ease international tensions and foster agreement among nations. At the opening session of the 3<sup>rd</sup> Latin American Scientific Congress, Councilor Carlos Augusto de Carvalho, the first vice-president of the Steering Committee, uttered the following words in his speech:

This is the social and international mission of a congress [...]; it cannot be mere showy display, provoking emulation and rivalry, nor can it assume the features of the ostentation of old universities. [...] By summing up the efforts of those who study, it awakens affection and meets affinities; it eliminates prejudices, dissolves antipathies, links brain to heart, strengthens the sentiment of respect for human dignity, which is the spirit of tolerance, love, and solidarity; it exercises a benign influence on international relations through the communion of moral interests that it establishes and perfects<sup>26</sup>.

The Mexican delegate, Mr. Carbajal y Rosas, stated in the same session:

Science, whose homeland is the world, fulfills among its immense goals that of bringing together in one fatherland all the countries of men. In this setting of supreme serenity, individuals forget what is sometimes hostile and exclusive in each one's national sentiment, and magnanimously collaborate in the task of aggrandizing not only their countries of origin, but all mankind itself, with no distinction of race, creed or flag<sup>27</sup>.

The Baron of Rio Branco, Minister of Foreign Affairs, had this to say:

The foremost, and, socially speaking, the most useful consequence of international congresses of scientists is the setting up of an intellectual commerce among men, who dedicated to the same tasks and research, generate knowledge among themselves at these meetings, and being able to watch and study, receive training for their homelands, albeit incidentally, in the field of politics, dissolving prejudices and dissipating misunderstandings, and thus cooperating in the great task of the pacification of spirits and the construction of friendship among nations. No form of official, tendentious propaganda matches this, which is spontaneously exercised by men of great worth, convinced and alienated from political passions<sup>28</sup>.

### *International Relations, Politics and Economy*

Although the 1905 Congress was Latin American, it was not driven by the prospect of opposition to the United States. To the contrary, it would seem that the absence of the USA created a space for subordinate nations to wage a

<sup>26</sup> Terceira reunião do Congresso Científico Latino-Americano, *Trabalhos Preliminares e Inauguração do Congresso*, Rio de Janeiro, Imprensa Nacional, 1906, vol. I, pp. 158-159.

<sup>27</sup> *Ibid.*, p. 185.

<sup>28</sup> *Ibid.*, p. 177.

competition for the most civilised and correctly governed, and thus deserved privileges in its relations with the «protecting» nation. At the opening, Councilor Carlos de Carvalho, posed this question:

Will a latent, disguised, anti-Anglo-Saxon league, stretching from Mexico to Tierra del Fuego, represent a centrifugal force, a state of antagonism preserving the Republics, where two Latin languages are spoken against the all-pervading influence of the American Union, be at least the trend of this Congress?

[...] I will say this not only on behalf of Brazil but also in accordance with the proud sentiment of all the Latin American Republics, such a conspiracy is entirely ruled out. Mr. President of the Republic, ladies and gentlemen – in the flags that here in this space [...] represent and symbolize the promising Latin American nationalities, Brazil sees the colors of the spectrum of the great American Light; Brazil knows that the Latin American Scientific Congress, giving this light a pronounced movement of sympathy and sincerity, will recompose it so that – great and hot as the sun that fecundates everything – the true motto of its efforts – Justice and peace – will perpetually shine on the souls of the republics of North, Center, and South America<sup>29</sup>.

In Latin American politics, and in Brazilian politics, especially, relations with the United States were standing out as a point of discussion, and leading to discussions at many congresses of the increasing hegemony of Pan Americanism. Apart from the political and economic domination expressed in diplomatic agreements, we find a subplot on the scientific and cultural plane, producing mediations and representations of the American continental congregation. The Monroe Doctrine was echoed by the dialog among professional and intellectual groups in Pan-American international congresses, where efforts to organize the state and its institutions were identified with the idea of «modern civilization», the clearest expression of which was the United States<sup>30</sup>. In 1922, US Secretary of State Charles E. Hughes, representing his country during the centenary Exhibition, tried to save a Pan Americanism that was under threat, since United States interventionism in Central America, and in the Caribbean region, had once more resuscitated distrust among several Latin American republics. In the concluding remarks of the public international law section of the legal Congress, one can see harmony with US intentions:

The proposals announced in the US presidential message of December 2, 1823, setting forth what is commonly known as the Monroe Doctrine, met the interests of the states of Latin America and do not affect the vital principle of sovereignty of these states which are still in the process of formation<sup>31</sup>.

<sup>29</sup> *Ibid.*, p. 33.

<sup>30</sup> Kuhlmann Jr., *As Grandes Festas Didáticas: a Educação Brasileira e as Exposições Internacionais, 1862-1922*, cit.

<sup>31</sup> See «Revista Jurídica», vol. 28, n. oct-dec., 1922, p. 172.

The definition of October 12 as *Children's Day* at the closing of the Third American Child Congress, appears to follow the same logic. At that meeting, Almir Madeira, of the Niteroi Institute for Child Protection [Instituto de Protecção à Infância de Niterói], said that dedicating one day to children was a trend in the «civilized world», for which

the sage policy of concord in the new continent should be increasingly buttressed and strengthened, and the idea of American fraternity should be especially cherished among our children. [...] At this auspicious historical moment of the most beautiful solidarity, and at which scientists, writers and philanthropists from all the states of Brazil, and the most notable representatives of American nations are present, I propose the following VOTE: The Third American Child Congress and the First Brazilian Childhood Protection Congress should encourage by every means available the governments represented here to celebrate 'Children's Day' in their respective countries on October 12<sup>th</sup>, the commemorative date of the discovery of America<sup>32</sup>.

Associated with political aspects, these agencies of cultural order are also related to the economy, as suggested in the comment that congresses are a type of intellectual commerce made by the Baron of Rio Branco in 1905, and likewise, by Mr. Eduardo Acevedo, Dean of the University of Montevideo, Chairman of the Third Latin American Scientific Congress in his address:

Such is the major task of these international congresses that bring together peoples that need to know each other and unite, and who need to become strong in order to defend their autonomy and thus become respectable forces within the principles of public international law. [...] the scientific tournaments that bring together the intellectuals of all sister peoples, encourage investigations, set up a commerce of ideas, disseminate what is done in each territory, rectify mistakes and put thought onto the same tracks<sup>33</sup>.

The link to the economy, beyond a commercial meaning, also alludes to industrial manufacturing, as in the address made by Mr. Antonio de Paula Freitas, 1<sup>st</sup> Secretary to the Steering Committee, when presenting a report on the works:

Scientific congresses will help patent the efforts of men of study and keep them in constant contact. Industries shall have their prominent position, and their congresses, and even more their exhibitions, true competitions from which they have achieved the most useful applications<sup>34</sup>.

In the opinion of Mr. Ataulpho de Paiva, in an address given at the National Library in 1913, about the new horizons of justice and welfare,

<sup>32</sup> Congresso Brasileiro de Protecção á Infancia, *Boletim* 6: 1921-1922, cit., p. 246.

<sup>33</sup> Terceira reunião do Congresso Cientifico Latino-Americano, *Trabalhos Preliminares e Inauguração do Congresso*, cit., vol. I, pp. 174-175.

<sup>34</sup> *Ibid.*, p. 171.

capitalism represents a higher function in the life of societies, and is, frankly, cosmopolitan in nature: «capitalist industrialist internationalism and scientific internationalism can be taken for each other, and complement each other»<sup>35</sup>.

### *Conclusion*

The intellectual sectors participating in the preparation for the congresses shared roles and duties. The conflicting concepts in theoretical formulations harmonized in these spaces for political articulation, aiming to produce and disseminate specific expertise, as well as to foster the debate and the formulation of proposals for the organization of the state, the ordering of the urban space, the creation of institutions and the definition of policies, legislation and rules. Thus, the dialog among professional and intellectual groups can be described by the concept of *formations*<sup>36</sup>. In the process of delimiting different fields – legal, medical, welfare, educational, and so on – the sharing of competencies was neither watertight nor restricted to given professions, as can be seen by the wide range of social segments interacting in the field of proposals. Issues of international relations, manufacturing, employment and the market, science and technology, social groups and classes, and relations of force, are present in the debates. In this sense, science was secondary, although it was represented as a protagonist: all proposals, seeking legitimacy, rested on the qualifying adjective of scientific.

Just as in a theater, projects building an illusion of progress as a tangible reality acted within these «spaces of the dramatization of the real»<sup>37</sup>. Both in institutional relations, and through social formations, in a range of ways and means, there were intellectuals, who organized themselves in order to spread concepts and promote political and institutional policies for political and social organization. These intellectual workers held, or wished to hold, positions in State agencies, in the Executive, Legislative, and Judicial branches, in the institutions and entities of civil society. The organization of as well as the participation in congresses – in addition to disseminating manifestos and being present in higher education, the participation in leagues and associations, in reviews and periodicals – created room for this social activity.

<sup>35</sup> A.N. Paiva, *Justiça e Assistência: Novos Horizontes*, Rio de Janeiro, Jornal do Commercio, p. 18.

<sup>36</sup> R. Williams, *Cultura*, Rio de Janeiro, Paz e Terra, 2000.

<sup>37</sup> De Souza Neves, *As vitrines do progresso*, cit., p. 18.





# Between rhetoric celebration and social marginalization

The teachers' and headmasters' memory and celebration through the obituaries published in the school and teachers' magazines in the first century after the unification (1861-1961). Part One\*

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**ABSTRACT:** Through the analysis of more than two thousand *obituaries* published in some of the more prestigious school, didactic and teachers' magazines of united Italy – the magazines of Turin «L'Istituto» (1852-1894), «L'Osservatore Scolastico» (1865-1899), «L'Unione dei maestri elementari d'Italia» (1870-1920) and «La Scuola Nazionale» (1889-1901); the Milanese (then Roman) magazine «I Diritti della Scuola» (1899-1994) and, finally, the one of Brescia «Scuola Italiana Moderna» (1893-present) – the Authors retrace the evolution of the model of the elementary school teacher and school official in the different historical periods and in the light of different ideological, political and cultural contexts. They also provide a unique and original insight into the meaning given to popular education and to the struggle against illiteracy, as well as to the role of education and school in the construction of national identity and in the promotion of the values of citizenship in the various phases of the long – time Italian unitary process.

**EET/TEE KEYWORDS:** History of Education; *Obituaries* of Teachers and School Officials; Journals for School and for Teachers; Cultural Identity; Italy; 19<sup>th</sup>-20<sup>th</sup> Centuries.

\* *Anna Ascenzi* wrote the first, second and third paragraphs of this article, while *Roberto Sani* the fourth, fifth and sixth paragraphs. The *Introduction* and *Conclusions* are the result of the joint work of the two authors.

## Introduction

This paper will be focused on one source – the *obituaries* published in the Italian school and teachers' magazines on the occasion of the death of teachers and school officials (head teachers, principals, school inspectors, directors of education etc.) – largely neglected and not at all used, at least in Italy, in the field of the history of schools and education<sup>1</sup>.

For this purpose, we will use the extensive collection of *obituaries* kept at the *Fund DBE*, recently deposited at the «Centre for the investigation and research on the history of school books and children's literature» of the University of Macerata by Giorgio Chiosso and Roberto Sani, directors of the monumental *Biographical Dictionary of Education 1800-2000*<sup>2</sup>.

The above mentioned Fund includes more than two thousand *obituaries* derived from some of the most prestigious school and teachers' magazines of united Italy: «L'Istituto. Foglio ebdomadario d'istruzione» (1852-1894), «L'Osservatore Scolastico. Giornale d'Istruzione e di Educazione» (1865-1899), «L'Unione dei maestri elementari d'Italia» (1870-1920) and «La Scuola Nazionale. Rassegna di Educazione e Istruzione» (1889-1901); «I Diritti della Scuola» (1899-1994) and, finally, «Scuola Italiana Moderna» (1893-present). They are magazines of different ideological and political orientation, reflecting, as a whole, the various and varied cultural and educational instances characterizing the debate on school and on the teaching profession in Italy after the unification.

These magazines cover a total period of more than a century and allow us to analyse the characteristics and evolution of this source in the long term, from the creation of the unitary state to the first World War and the fascist period, until the advent, after the Second World War, of the republican democracy and the major socio-economic and cultural changes of the Second postwar period, from the industrial expansion to the development of the consumer society.

By examining the *obituaries* – here considered not only as a biographical source, but also as a means of identity construction for the groups and institutions that produced them –, we intend to retrace the evolution of the

<sup>1</sup> See A. Bianchi, *La storia della scuola in Italia dall'Unità ai nostri giorni*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla Legge Casati al Centro-Sinistra*, Brescia, La Scuola, 2001, pp. 499-529; R. Sani, *Scuola e istruzione elementare in Italia dall'Unità al primo dopoguerra: itinerari storiografici e di ricerca*, in R. Sani, A. Tedde (edd.), *Maestri e istruzione popolare in Italia tra Otto e Novecento*, Milano, Vita e Pensiero, 2003, pp. 3-17; 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. VI, n. 1, 2011, pp. 253-280.

<sup>2</sup> G. Chiosso, R. Sani (dir.), *Dizionario Biografico dell'Educazione 1800-2000*, 2 vols., Milano, Editrice Bibliografica, 2013. See M. Brunelli, *The «Centre for Documentation and Research in History of Textbook & Children's Literature» in University of Macerata (Italy)*, «History of Education & Children's Literature», vol. IV, n. 2, 2009, pp. 441-452.

model of teacher and school official in the different historical periods and in the light of the different ideological, political and cultural backgrounds. In doing so, we will analyse the importance given to popular education and to the struggle against illiteracy, as well as to the role of education, and of the school itself, in the creation of the national identity and in the promotion of the values of citizenship in the various periods of the unification process<sup>3</sup>.

After the Unification and for over a century, the *obituaries*, far from being an obsolete or marginal literary genre, played an increasingly important role in didactic, school and teachers' magazines, as proved by the constant presence of one or more regular columns dedicated to them and, in particular, by the continuous and systematic way in which the main Italian school magazines kept alive the memory and the example of the «fallen Colleagues» and «disappeared Educators».

In this regard, in the early thirties of the XX century, on the occasion of the re-establishment, after a brief interruption, of the column «Resurgent» on the pages of «Scuola Italiana Moderna», it was significantly pointed out:

The sad column re-starts. It is perhaps the most constant in the magazine, because it is always present. Every week we have victims of duty, teachers burnt out by school, sometimes very young. [...] It is a sort of roll of honour of the Italian teachers. For this reason, we would like that for all the disappeared teachers there was a colleague writing about them, so that everyone in Italy working for the school and following us, can know that they are gone to God and remember them with the solidarity of suffrage<sup>4</sup>.

We should point out that, if in the second half of the XIX century the teachers' and headmasters' commemoration was entrusted to austere sections called «Obituary», «*Obituaries*», «Brief *obituaries*», or «Obituary register», from the first decades of the twentieth century these sections not only multiplied but also changed their names. Think, for example, to the magazine «I Diritti della Scuola» and its various columns: «Mourning in the Family», «Departed figures», «Departed Educators», «In Memory», «Those who have left us».

It is also the case of the long-lived «Scuola Italiana Moderna», in which the *obituaries* found place in columns called «In Memoriam», «Echoes», «On the field of duty», «Pro Patria» (the last two for the teachers died in the WWI); and, in addition to «Resurgent», «In the light of glory», «Our Heroes» and «Register of glory. Fallen colleagues», dedicated to the teachers died in the World War II; «Teachers of life after the death», for teachers who were partisans or soldiers of the regular army killed by the fascists during the struggle for liberation; and finally, «Educators who disappear» in the post-war period.

<sup>3</sup> On the *obituary* considered not only as a biographical source, but also as a means of identity construction for groups and institutions that produce it, see M. Perry, *'Red Ellen' Wilkinson: Her ideas, movements and world*, Manchester, Manchester University Press, 2014.

<sup>4</sup> *Resurgent*, «Scuola Italiana Moderna», vol. XLIII, n. 1, 9 September 1933, p. XV.

The organization and features of the *obituaries* were very varied, thus revealing a certain number of approaches and rhetorical references: in fact, they range from a few lines containing the deceased teacher's essential data and some set phrases, in the case of simple teachers or not particularly well-known headmasters, to real biographical commemorations, – sometimes with references to their 'merits' and professional qualities and the presentation of their published works – in the case of the more renowned personalities (teachers become MPs or ministers, high-ranking ministry officials, teachers arrived to university chairs or who distinguished themselves for their merits in the field of innovation and pedagogical teaching etc.)

In our opinion, short *obituaries* dedicated to simple teachers, school officials and headmasters of local communities and not in the limelight are particularly important (more than the biographical recollections of the great personalities) for the in – depth analysis of the model of teacher and school official proposed by magazines in different historical periods and in the light of different ideological, political and cultural contexts.

Hence, the decision to pay a particular attention, in our work, not only to the great figures involved in public education, but also to the «modest and hard-working educators», to the «humble and silent workers of the school and of the 'alphabet'» who, not in the limelight, were always described in school and teachers' magazines as models and points of reference for the teaching community as a whole, by virtue of their efforts «to educate and instruct the boys entrusted to their cares with paternal affection, [...] sweating and struggling for the children of the nation»<sup>5</sup>.

1. «Among pretentious and boastful people, schools are full of». *The periodic of Turin «L'Istituto» and the promotion of a new ideal of teacher after the national unification*

Founded in Turin in 1852 by Domenico Berti, who directed it in a first phase, and intended to take up the legacy of the «Giornale della Società d'Istruzione e di Educazione» (1849-1852), «L'Istituto» (1852-1894) can be certainly considered «the first real didactic and teachers' magazine on a national scale». In fact, it was one of the most representative and authoritative school paper of the last forty years of the nineteenth century, being it particularly active in spreading the pedagogical principles of spiritualist and liberal-Catholic inspiration (Niccolò Tommaseo, Antonio Rosmini etc.) and in supporting the renewal of public and private education in a liberal moderate sense.

<sup>5</sup> Ramello Antonio, «L'Unione dei maestri elementari d'Italia», vol. XI, n. 9, 4 May 1880, p. 138.

The magazine of Turin supported the view of a religiously-oriented school, but not subjected to the control of the Church and the intransigent and obscurantist clergy, underlining the importance of the freedom in teaching against the statist Liberals' centralist intentions. It, in defending the school and didactic freedom and the teachers' autonomy, promoted an open idea of pedagogy and education, against all forms of dogmatism and schematism.

In particular, after the National unification, «L'Istituto» engaged a real battle in favour of the improvement of the legal and economic status of elementary teachers, whose unique function was underlined over and over again, being them described as «national educators» and real «creators and protagonists», through the school, of the transformation of the common people «in a people conscious of their duties, law-abiding and jealous guardian of national independence»<sup>6</sup>.

The section containing the *obituaries* had a particular function, not at all secondary, in the enhancement of the role and prerogatives of the social class of teachers in the new unified state. They were charged not only with the «noble duty» of «celebrating those honest citizens» and «keeping alive among the younger generations their memory», but also with the «sacred duty» of «recalling the teachers' virtues», showing them as models in order to evoke among the readers, or among the whole social class of teachers, a desire to emulate them. At the same time, they had to increase the prestige and authority of the category within the public opinion and the ruling classes of the country.

In this regard, we can easily understand the emphasis with which «L'Istituto», particularly during the first two decades after the unification, underlined the role of the school and teachers in promoting a strong national consciousness and a lively sense of belonging to the new unitary state among the younger generation<sup>7</sup>. So, when it reported the death of Giacomo Demichelis, the elderly and humble schoolteacher of Bosco Marengo, a small rural town in the province of Alessandria, it particularly emphasized his being member of the special category of the «honest citizens»: they were men that, carrying out their high task as educators, had produced a «benefit for the whole country», thus becoming «worthy» of «being commemorated»:

<sup>6</sup> On the magazine of Turin «L'Istituto» (1852-1894), see in particular: G. Chiosso, *I giornali scolastici torinesi dopo l'Unità*, in Id. (ed.), *Scuola e stampa nell'Italia liberale. Giornali e riviste per l'educazione dall'Unità a fine secolo*, Brescia, La Scuola, 1993, pp. 7-50; and Id., *Istituto (L')*, in Id. (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, Brescia, La Scuola, 1997, pp. 365-367.

<sup>7</sup> In a commemorative article published in the column «Bozzettini biografici di illustri maestri italiani» (Biographical sketches of famous Italian teachers) in May 1873, in this regard, it was stated: «When Francis II of Austria visited the University of Pavia, he said to the teachers around him – Gentlemen, I want you to create good subjects for me: I do not want poets and scholars. – However, in Italy there were always teachers, who, instead of creating good subjects, were engaged in educating good citizens and patriots» (C. Avalle, *Cola Montano*, «L'Istituto», vol. XXI, n. 18, 3 May 1873, n. 18, pp. 285-288).

In Bosco Marengo – we can read in the *obituary* for the teacher Giacomo Demichelis – he was charged with the role of primary school teacher. It lasted more than 38 years, so that almost the whole present generation of that country received the first teachings from him. [...] He always cultivated the Italian language with great love, and he wrote very well: and he always said that we all have to study it well at school, since our language is beautiful, and without it *we would never have been ourselves*. And then he talked about the homeland as something that joined the rights and duties of all the inhabitants of Italy: and he wisely distinguished the love for the homeland from that for the country. [...] He was good and pious: he conciliated the domestic affections with those for the homeland, the religious to civil ones: and his deep religious sentiment made him morally stronger; and he wisely used his reason, affirming to feel more strongly the need for faith<sup>8</sup>.

A deep affection for the homeland, an authentic religious consciousness and a vigorous moral probity were also the Carlo Avalle's qualities, teacher of history and geography at the Liceo R. Gioberti in Turin. «L'Istituto», in fact, stressed not only that he strongly supported the popular education and the teachers' cause, but that he was also committed in the ethical and civil growth and in the patriotic education of his young students:

He – the obituary published in July 1873 said – leaves in the misery his wife, his relatives and a lot of his friends who were able to appreciate the good qualities of his soul and blameless life. Italians mourn him as an uncorrupted citizen. [...] All the teachers whose cause he supported will remember him, as well as the multitude of young people he educated to the cult of homeland and of every virtue<sup>9</sup>.

With reference to the period immediately following the unification, the several *obituaries* dedicated to certain priests and religious teachers are also very interesting: the narration of their choices and work gave to the magazine of Turin the opportunity of focusing on the fundamental role of the Christian religion in the education and school field, as well as on the particular characteristics that the many «ministers of the Altar» had to possess. They were called to teach in public schools, which, as you know, were particularly numerous and significant, in fact, as Aristide Gabelli pointed out, they amounted to almost ten thousand units in the whole peninsula, i.e. the 26% of the total, with reference to the late sixties<sup>10</sup>.

«L'Istituto» in March 1862, in commemorating father Pietro Barberis, who had been vice-priest in the parish of Pino d'Asti and then, for a long time, a primary school teacher in the municipal schools of Turin, not only recalled the salient aspects of his biography, but focused in particular on the «noble qualities of his soul» and the «rare qualities» who had made him an «excellent teacher»

<sup>8</sup> Demichelis Giacomo, «L'Istituto», vol. XX, n. 52, 28 December 1872, pp. 818-820.

<sup>9</sup> Avalle Carlo, «L'Istituto», vol. XXI, n. 27, 5 July 1873, p. 437. See also Carbone Domenico, «L'Istituto», vol. XXXI, n. 13, 31 March 1883, p. 208.

<sup>10</sup> A. Gabelli, *L'istruzione elementare in Italia secondo gli ultimi documenti pubblicati dal Ministero*, «Nuova Antologia», vol. V, n. 13, 1870, p. 190. See also *Sulle condizioni della pubblica istruzione nel regno d'Italia. Relazione generale presentata al Ministro dal Consiglio Superiore di Torino*, Milano, Stamperia Reale, 1865, pp. 403-405.

and a true «example» for «the clergy of Turin» and the whole «teachers' social class» of the town. In this regard, the paper underlined «his hard work in the service of God and the neighbour with love, gentleness and perseverance», but also «his love for the homeland» and his «rare modesty», together with his «great abilities», for which he was «respected by all his pupils and dear to all his colleagues»; finally, it recalled the «unparalleled zeal» and «highest prudence» which characterized his teaching process, showing a particular ability in the education of young people»:

Father Pietro Barberis – we can read in the conclusion of the *obituary* – was very mild-tempered, always the same in every condition of life, he was deeply engaged with his theological and moral studies, he cultivated humanities and poetry with love, he preached effectively and with pious fervour, [...] he was an example for the clergy and teachers for his moderation and tolerance, as well as for his culture, his blameless virtue and sincere religion<sup>11</sup>.

Some years later, an *obituary* containing similar themes was published in «L'Istituto»: it was about another member of the clergy, Giovanni Battista Cordiviola from Genoa, who was «one of the most distinguished students of Troya and Rayneri, who always remembered him with affection». Later, he became teacher and then headmaster of the civic schools in the district of San Teodoro in Genoa, and maintained this role «with joyful abnegation and with tireless zeal until the end of his life». The magazine, as in the case of Barberis, underlined, above all, father Cordiviola's modest character, «a temperament much more modest than the usual one of the times», that brought him to carry a «lonely life, satisfied of his seclusion ». But the author of the *obituary* underlined that this was not due to a «lack of doctrine and culture; because he had carried out good literary and pedagogical studies», but to the fact that «Cordiviola rather than boasting about his scientific knowledge and philanthropy, preferred to study, work and perform good actions in silence».

He had a «strong and patient» soul, and lived his double vocation as a priest and a teacher with «dignified sobriety, always happy for his condition and able to relieve the misery of the others». In this regard, the conclusion of «L'Istituto» is not surprising: «G.B. Cordiviola, honest priest respecting all his duties», with his qualities and with the «continuous and active commitment» in favour of the people's children, «had deserved a lasting monument of benevolence in the heart of many Genoese citizens and of all the inhabitants of the district of San Teodoro»<sup>12</sup>.

Starting from the mid-seventies, the *obituaries* published in «L'Istituto» contained a gradually stronger complaint about the primary school teachers' difficult conditions, due to the substantial lack of legal protection and, above

<sup>11</sup> *Barberis don Pietro*, «L'Istituto», vol. X, n. 12, 22 March 1862, pp. 178-181.

<sup>12</sup> *Cordiviola Giovanni Battista*, «L'Istituto», vol. XVI, n. 28, 11 July 1868, pp. 433-434.

all, to the inadequateness of their salaries. In the articles commemorating the disappeared teachers, in this regard, the demand for better living conditions, and the consequent request to the Government and Parliament of a systematic and decisive action, arose from the awareness of the enormous «intolerable gap» between the «serious responsibilities» the teachers had to manage and the «humiliating paucity of their remuneration».

In January 1875, for example, in announcing the death of Raffaello Rossi, teacher of literature in the technical schools of Udine, the magazine of Turin firstly recalled his great merits as a teacher, first in primary and then in technical schools («he felt the calling to teaching and possessed the necessary grace to interrogate young minds») and his «real fame» as able specialist in the «difficult art of education», and then lamented how his whole life was characterized by the sacrifice for the «insufficient salary received», and how his premature death – in the absence of any form of support and protection for those teachers who were destined to become «martyrs of work» – had made seriously uncertain the fate of his «desolate family»:

Raffaello Rossi [...] realized early that if the teaching profession is sublime in its purpose and pleasant in its exercise, it is equally thorny and unhappy in material interests. The teachers, whichever was their social class, had the same school education and instruction of any civil employee. But they are paid very differently! Generally, in some cities, they are paid less than a woodsman, although they are required to carry out an ongoing study to keep up with the increasing progress of art and industry. If then they have a family they are very often forced to let their sons have a humble job so that they are no longer a burden for their family, although they give education to the people's children to provide them with a more comfortable life<sup>13</sup>.

A very similar complaint can be found in the *obituary* of June 1879 dedicated «to the modest and hardworking teacher» Maria Aly Belfadel, who after having devoted «twenty-six years to primary education», enduring the «difficulties and misfortunes» of her «condition as a teacher in a suburb», suddenly departed this life and the love of her family:

She had to experience severe hardships, difficulties and misfortunes – the author of the *obituary* concluded – but she was never heard complaining about her miserable situation or her misfortune. [...] She was patient, always loving, she never got angry and had a nice smile for all her friends and acquaintances. [...] She was always praised for her wise and loving way of teaching by her superiors, relatives and pupils. She was a pious and generous soul, martyr of work and education!<sup>14</sup>

<sup>13</sup> Rossi Raffaello, «L'Istituto», vol. XXIII, n. 2, 9 January 1875, pp. 37-38.

<sup>14</sup> Aly Belfadel Maria, «L'Istituto», vol. XXVII, n. 26, 28 June 1879, pp. 414-415. See also Pelazza Pietro, «L'Istituto», vol. XXIII, n. 43, 23 October 1875, pp. 694-695; Vercelli Virginio, «L'Istituto», vol. XXV, n. 37, 15 September 1877, p. 590; and Adorni Giovanni, «L'Istituto», vol. XXV, n. 44, 3 November 1877, pp. 689-690.



Finally, the lively and passionate battle fought on the pages of «L'Istituto» in the last two decades of the century in favour of the improvement of the teachers' legal and economic conditions and their cultural and professional competence, is also found in the various *obituaries* dedicated to school officials and ministerial inspectors, whose attitude towards elementary teachers and, more generally, the merits acquired in the relationship with the whole teachers' social class, were underlined.

So, Costanzo Malacarne, director of the normal school of L'Aquila and disappeared in the summer of 1875, was celebrated above all for the tireless efforts devoted to the «noble purpose of raising the social status of the Italian teachers, responsible for the first education of young people, and, consequently, for the future of the country»<sup>15</sup>; his colleague Giovanni Battista Ramoino, director of the normal school of Lucca, who died suddenly in March of 1882, when «he was only 49 years old», was remembered for his daily work to improve teachers' competence and to renew teaching methods in primary and popular schools<sup>16</sup>.

Similarly, the school inspector of the district of Asti, Giuseppe Rota, died in April of 1878, was celebrated for the significant merits acquired in his service and, in particular, for the «Teachers' respect» he had deserved, working with «devotion and resoluteness»<sup>17</sup>; while the Inspector of Crema, Paolo Delfino, who died a few months later, was remembered for his devotion, from an early age, to «the role of people's educator for which he always showed a great talent, or, rather, a kind of cult». Then, he maintained the role of school inspector in different Italian centers always being very «zealous in his duty and tireless promoter of the public good». So «L'Istituto» stressed very significantly:

He loved the teachers as a father loves his children, and he was loved in return from them. He protected them, as he could, against the abuses and oppressions of municipal groups, that are always present, especially in small towns. He encouraged shy teachers with good manners; he gave a shake to the lazy ones and reinforced the good teachers, and he stimulated all of them to perform the duties of their noble apostolate<sup>18</sup>.

<sup>15</sup> *Malacarne Costanzo*, «L'Istituto», vol. XXIII, n. 28, 10 July 1875, pp. 440-441.

<sup>16</sup> *Ramoino Giovanni Battista*, «L'Istituto», vol. XXX, n. 11, 18 March 1882, p. 166.

<sup>17</sup> *Rota Giuseppe*, «L'Istituto», vol. XXVI, n. 16, 20 April 1878, p. 254.

<sup>18</sup> *Delfino Paolo*, «L'Istituto», vol. XXVII, n. 5, 1 February 1879, pp. 73-74.

2. «*Continuing the revival of national consciousness in the young and people's consciousness*». The magazines of Turin «*L'Observatore Scolastico*» and «*La Scuola Nazionale*» and the teachers' ethical- civil and patriotic responsibility in Italy in the late nineteenth century

The climate of political and cultural decline that characterized the last fifteen years of the nineteenth century and the prevalence, also in the school policy, of the nationalist requests expressed by the government led by Francesco Crispi brought to a broad debate on the necessity of renewing the «educational function» of primary and popular school and, in particular, the role of primary school teachers in the promotion of the national identity and the feeling of belonging to the unitary State in the young generations<sup>19</sup>.

The purpose, summed up in the formula «instruct the people just enough, educate them the more you can» created in the early nineties by the Minister of Education Guido Baccelli, drew inspiration not only from didactic and pedagogical issues, but also, and especially, from fundamentally political reasons. The need to define people's education within clearly defined boundaries and to determine its characteristics and extension according to the practical needs of the lower classes and to the specific needs of the productive life and labour market in urban and rural areas, was associated, in fact, also with the prospect of making primary school a place and a means for national and civil education, essentially aimed at strengthening the social cohesion and the full identification of the populations with the organizations and the institutions of the liberal state, through a complex process of homogenization and nationalization of the Italians<sup>20</sup>.

It was necessary, as the Educational Programs of 1894 stated, to promote, through the «primary school, morally renewed generations, whose respect of the laws is strong and invincible [...] so that the love of the country can turn into daily acts of honesty, work and sacrifice»<sup>21</sup>.

Among the Italian didactic and teachers' magazines in line with Crispi's view of a «nationalization» of the Italians to be achieved through school – above all the elementary one, restored to its authentic physiognomy of «people's school» and

<sup>19</sup> See, in this regard: G. Chiosso, *Nazionalità ed educazione degli Italiani nel secondo Ottocento*, «Pedagogia e Vita», vol. 48, n. 4, 1987, pp. 421-440; and above all A. Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale. L'insegnamento della storia nelle scuole italiane dell'Ottocento*, Milano, Vita e Pensiero, 2004.

<sup>20</sup> See U. Levra, *Il colpo di stato della borghesia. La crisi politica di fine secolo in Italia 1896-1900*, Milano, Feltrinelli, 1975; F. Gaeta, *La crisi di fine secolo e l'età giolittiana*, Torino, UTET, 1982; U. Levra, *Fare gli italiani. Memoria e celebrazione del Risorgimento*, Torino, Comitato di Torino dell'Istituto per la storia del Risorgimento italiano, 1992; and C. Duggan, *Creare la nazione. Vita di Francesco Crispi*, Roma-Bari, Laterza, 2000.

<sup>21</sup> *Istruzioni speciali. IV. Storia d'Italia, Geografia, Diritti e doveri del cittadino*, in R.D. 29 November 1894, n. 525 – *Riforma dei programmi per le scuole elementari*, «Bollettino Ufficiale del Ministero della Pubblica Istruzione», 1894, first part, pp. 1888-1916.

charged with the task of an inter-classist education – there were, in the nineties, two magazines of Turin, «L'Osservatore scolastico. Giornale d'istruzione e d'educazione» (1865-1899) and «La Scuola nazionale. Rassegna di educazione e istruzione per le scuole elementari e normali e per gli educatori d'infanzia» (1889-1901). They, very different in their origins and organizations, were united by the awareness that the essential enhancement of the role of primary teacher should be carried out by stressing his role as «national educator» and «instrument of moral and civil redemption» of the country.

«L'Osservatore scolastico», first published in the mid-sixties, was for a long time an almost exclusively didactic magazine, a «simple support to help teachers» in the practical exercise of teaching. Only since the seventies it became interested in the political-educational events, giving space to the hardships and problems of the teachers' category. «L'Osservatore scolastico», originally quite moderate, in the nineties became one of the most active supporters of Crispi's school policy, always remaining spiritualist in its inspiration and rigidly hostile to the secularization of primary education promoted in the Seventies (Cesare Correnti, Michael Coppino, Pasquale Villari etc.) and to the circulation of positivist educational and didactic theories in the school and among the teachers<sup>22</sup>.

The other magazine of Turin, «La Scuola nazionale», was hostile to the lay influence of the Left wing of Depretis on the Italian school policy and critical towards the positivist scientific pedagogy. It, during his short life, not only urged the Ministry of Education to support the renewal of the training of teachers, but spoke in favour of a «national school, legitimately derived from our best traditions», which should have been the privileged space through which «the sense of duty, the devotion to the public good and the love for country»<sup>23</sup> were promoted in the younger generations,.

Both of these magazines gave a great space to the *obituaries* of disappeared teachers and headmasters and school officials, because «preserving the memory» of those who distinguished themselves as the most authentic «benefactors of the people» and «apostles of the homeland» was useful in order «to incite the other [teachers] to the same noble deeds»<sup>24</sup>, but also to support the battle to raise the Italian primary school and teachers' category from the «abjection in which they are»<sup>25</sup>.

<sup>22</sup> On «L'Osservatore scolastico» (1865-1899), see in particular: G. Chiosso, *Osservatore (L') Scolastico*, in Id. (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, Brescia, La Scuola, 1992, pp. 306-308; and Id., *Osservatore (L') Scolastico*, in Id. (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 472-474.

<sup>23</sup> On «La Scuola nazionale» (1889-1901), see G. Chiosso, *Scuola (La) Nazionale*, in G. Chiosso (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, cit., pp. 396-397; and G. Chiosso, *Scuola (La) Nazionale*, in G. Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 644-645.

<sup>24</sup> *Ottolenghi Belom*, «L'Osservatore Scolastico», vol. XXV, n. 25, 25 March 1890, p. 399.

<sup>25</sup> C. Sinatra, *Alla Minerva*, «La Scuola Nazionale», vol. 3, n. 8, 28 November 1891, p. 121.

In this regard, the efforts made by the two school magazines, in the nineties, in favour of the affirmation of an ideal figure of teacher strongly marked in ethical and civic sense and, thereby, able to exercise a genuine and undisputed authority on the communities, are not a surprise. An authority that was the fundamental premise for the teachers to perform their «leading role» towards the most vulnerable and marginalized social groups. They were required to perform this role «even outside the classroom», working on «the families' trust» and the «citizens' consideration» in their regards, and to teach the respect of the «law» and «authority», increasing in the population the love for «the homeland».

So, in March 1890, «L'Osservatore scolastico», commemorating the teacher Acqui Belom Ottolenghi, not only recalled his «zeal, activity and intelligence superior to any praise, in trying to educate not only the minds of the young men, but to transmit the most honest principles, the nobler feelings» but it also underlined his extraordinary moral and civil qualities («honest and loyal citizen, scrupulous observer of those honest principles he tried to instill into the soul of the other people»), thanks to which he could «enjoy the highest respect and the deepest affection on the part of the whole town»<sup>26</sup>.

Similarly the magazine, in giving news of the recent death of Giovanni Lorenzoni, the primary school teacher of Bassano Vicentino, and of Giuseppe Martinez, from Ferla, near Syracuse, underlined that the former would have been remembered by the other citizens «with gratitude for his useful work among the teachers of Bassano, paying to his memory the honor due to a true benefactor of the people», that had devoted all his «wit, heart, and too short life»<sup>27</sup> to «the education of the new generations» and to the civil development of his community. About the latter, teacher from Sicily, we can read:

*Honest citizen*, able to gain the benevolence and respect of all social classes and the admiration of the great number of friends. *Decorum of the clergy*, he preferred a rare modesty, and his elected soul was never touched by poor ambitions. [...] *Glory of the teachers*, he did not disdain the modest work of diligent educator for more than thirty years of praiseworthy service in his homeland<sup>28</sup>.

<sup>26</sup> *Ottolenghi Belom*, cit., p. 399. But see also the obituary published in March 1892 for the teacher and vice-director of the elementary schools of Alessandria Modesto Boccone: the «good soldier of progress» dead «at work». He was remembered for his great qualities («active, modest, intelligent, with a great heart and very zealous in the cause of the teachers») and the special effort devoted to the promotion of «patriotism» among populations (*Boccone Modesto*, «L'Osservatore Scolastico», vol. XXVII, n. 23, 12 March 1892, p. 368).

<sup>27</sup> *Lorenzoni Giovanni*, «L'Osservatore Scolastico», vol. XXX, n. 35, 8 June 1895, p. 838.

<sup>28</sup> *Martinez don Giuseppe*, «L'Osservatore Scolastico», vol. XXXI, n. 20, 14 marzo 1896, p. 276. See also the *obituary* of the master of Turin Giovanni Calissano published in May 1899, in which we can read: «He had a very mild temper, affable, helpful with his friends, zealous and meticulous in carrying out his duty, he was highly esteemed by his superiors school and loved by all his colleagues. [...] A man of exemplary honesty, strong character and of an uncommon rectitude of judgments and actions» (*Calissano Giovanni*, «L'Osservatore Scolastico», vol. XXXIV, n. 29, 13 maggio 1899, p. 456).

Various *obituaries* published in that same period on «La Scuola nazionale», were very similar. It is the case, for example, of the teacher Domenico De Rossi, director of one of the normal schools of the capital. The magazine of Turin wrote about him, in the spring of 1894:

Blameless and simple habits, hardworking and exemplary life, lucid mind and wide culture, [...] mild and generous spirit, loving and benevolent heart, honest and unchanging will. [...] He gained the trust of the families in a short time, and also the respect of the citizens and the affection of the students. [...] Oh how many hardships, how many troubles, how much suffering the school provoked to him! With his death another member of that glorious group disappears, for which the teaching was apostolate, the school a gym of moral and civic education, the duty a cult to worship and the sacrifice a way of life<sup>29</sup>.

It is also the case of the primary school teachers in the towns of Fenestrelle, in the province of Turin, and Bra, in that of Cuneo, disappeared respectively in March 1896 and January 1897. Of the former, Francesco Mondon, «La Scuola nazionale» remembered as he was «deeply committed in the education and instruction of his fellow citizens»; and how he distinguished himself not only for his extraordinary «love for the study» and the «tireless zeal in the exercise of his noble role», but also, and above all, for his «constant study in order to be of use to the others with his deeds and advices»: « Not only almost two generations of Fenestrelle, but even our whole valley, received a solid instruction and a good education from him »<sup>30</sup>.

The above mentioned magazine, wrote about the latter, Giovanni Bonino:

This dear teacher and educator is passed away. He was the Nestor of elementary teachers in the city of Bra, because he began his school career on the 12<sup>th</sup> March, 1853 as a substitute, and he was then appointed permanent Teacher on the 9<sup>th</sup> October, 1856. So, he spent 44 years in teaching, and in this long time, three generations received by him primary education, because he, a very active and caring person, was never absent from his work. Driven by a patriotic impulse, he devoted himself to teaching with the energy and the good will that characterized all his duties, being him a man of action. [...] The people, remained in a state of ignorance under all the despotic governments, had to be not only educated, but prepared to the new freedom and love of country deriving from the liberation, independence and unification of Italy. Bonino was one of the teachers who highly felt this great and noble mission of the Popular School. He succeeded in transmit his patriotism in his disciples. He was a highly honest and loyal man, he gained the affection and respect of his fellow citizens and of his many disciples<sup>31</sup>.

Finally, «La Scuola nazionale» published the *obituary* of the director of the elementary schools of Rivoli, Giovanni Battista Aymaretto, a «gentleman» and

<sup>29</sup> *De Rossi Domenico*, «La Scuola Nazionale», vol. VI, n. 23, 16 April 1894, p. 354. See also *Ponti Antonio*, «La Scuola Nazionale», vol. III, n. 8, 28 November 1891, pp. 121; and *Griffi Giuseppe*, «La Scuola Nazionale», vol. IV, n. 38, 26 June 1893, p. 607.

<sup>30</sup> *Mondon Francesco*, «La Scuola Nazionale», vol. VII, n. 28, 23 April 1896, p. 448.

<sup>31</sup> *Bonino Giovanni*, «La Scuola Nazionale», vol. VIII, n. 16, 28 January 1897, pp. 254-255.

«a true teacher and educator», underlining his particular «vocation» for what was considered an authentic «patriotic apostolate», intended to improve the fate of the «Nation» and to be a «shining example of civic virtues»:

The man we commemorate today belonged to the noble and strong multitude of the Educators of Piedmont, that considered their job a true apostolate, working for the regeneration of the sons of the people. [...] He was aware of the greatness and nobility of his duty, and fought, fearless, for more than 30 years, with all the enthusiasm that comes from a just and holy cause, against a terrible enemy, that never forgives, the *ignorance*<sup>32</sup>.

In the nineties the *obituaries* published in this two school magazines analysed several other issues, including those relating to the strengthening and renewal of pedagogical and teaching competence of primary school teachers and that of the important role of the teachers in the fight against illiteracy and the spread of popular education in Italy.

For what concerns the first of these issues, «L'Osservatore scolastico» led a vigorous campaign for the cultural and professional update of the teachers, presenting to its readers, through the *obituaries*, a series of 'exemplary models' of teachers who distinguished themselves for their «strong didactic culture» and for the effectiveness of their «educational teaching». So Giulio Cesare Mascarelli, a teacher from Alba prematurely disappeared, was praised not only for his being an «uncommon genius» and a «tireless worker», but also for his «pedagogical wisdom» and his «wide and strong didactic culture» for which he was universally appreciated<sup>33</sup>.

The *obituary* for the elementary teacher Esther Callery, who was the director of the female High School of Turin, was very similar in themes. She was celebrated for her ability to give her institute «a praiseworthy educational address»<sup>34</sup>, thanks to her pedagogical competence and admirable and fruitful teaching art.

Similarly, the school magazine of Turin praised the extraordinary «culture and educational experience» of Michele Rosa, a humble primary school teacher of a small town in the province of Turin become, thanks to his professional skills and «wise educational principles», a teacher of normal school and then director of education and central inspector at the Ministry of Education, showing «dignity and a calm and solid character»<sup>35</sup>.

<sup>32</sup> *Aymaretto Giovanni Battista*, «La Scuola Nazionale», vol. VIII, n. 42, 10 September 1897, pp. 670-671. See also *Porchiotti Eusebio*, «La Scuola Nazionale», vol. XI, n. 19, 15 February 1900, p. 299.

<sup>33</sup> *Mascarelli Giulio Cesare*, «L'Osservatore Scolastico», vol. XXIX, n. 4, 20 August 1894, pp. 1009-1011.

<sup>34</sup> *Callery vedova Bellezza Ester*, «L'Osservatore Scolastico», vol. XXXI, n. 40, 25 July 1896, p. 492. See also *Rho-Negri Clelia*, «L'Osservatore Scolastico», vol. XXXIV, n. 1, 1 November 1898, p. 8.

<sup>35</sup> *Rosa Michele*, «L'Osservatore Scolastico», vol. XXXI, n. 20, 22 February 1896, pp. 236-237. See also *Conti Aristide*, «La Scuola Nazionale», vol. XII, n. 13, 10 January 1901, pp. 204-205.

For what concerns the other above mentioned issue, the *obituaries* published in «La Scuola nazionale» in the nineties underlined the importance of the role of the teachers in the fight against illiteracy and for the spread of popular education in Italy. This is the case, for example, of the elementary teacher of the small village of Farigliano, Giuseppe Arnaldi, a «sincere supporter of popular education» who thought the alphabet to the young people of the place, providing them with valuable benefits, so as to be considered «a second loving father»<sup>36</sup>.

A similar recognition, finally, was bestowed to the elementary teacher of Foggia Salvatore Secchi-Dettori, «born to be a Teacher»<sup>37</sup>, to that of Turin Carlo Demarie, a «gentle apostle of popular education»<sup>38</sup>, and, finally, to Guido Ruffino, elementary teacher and then teacher in normal schools and school inspector, for which the instruction and education of the people were «the supreme ideals of his industrious life»<sup>39</sup>.

The *obituaries* published in «L'Osservatore scolastico» and «La Scuola nazionale» permitted also, as «L'Istituto» did, to denunciate the serious economic hardships and the absence of adequate legal protections that still characterized the teachers' category.

In this regard «L'Osservatore scolastico», communicating the death of the «good teacher Raffaello Nardi from Savignano di Romagna», died when he was «only forty years old» after «23 years of creditable service in the public primary education», denounced that he, after a life of «hardships and deprivations», was left totally abandoned («the Government denied him a subsidy, a charity, in such an extreme poverty») so that he was destined «to perish in abject poverty: this was the prize reserved to an Italian teacher!»:

This gloomy picture – the magazine stated in its conclusion – which unfortunately is not a unique case, could move the honorable representatives of the nation to correspond with facts and not with rhetorical phrases the mission of sacrifice of the primary school teachers!<sup>40</sup>

The moving and premature death of this poor and only forty years old teacher, after a life of misery and hardships, wasn't an isolated case, as proved by many teachers who, as in the case of Carlo Tegon from Treviso, died for

<sup>36</sup> *Arnaldi Giuseppe*, «La Scuola Nazionale», vol. I, n. 20, 26 March 1890, p. 314.

<sup>37</sup> *Secchi-Dettori Salvatore*, «La Scuola Nazionale», vol. VIII, n. 15, 21 January 1897, p. 239.

<sup>38</sup> *Demarie Carlo*, «La Scuola Nazionale», vol. VIII, n. 20, 25 February 1897, p. 315. See also *Moriondi Michele*, «La Scuola Nazionale», vol. XI, n. 10, 14 December 1899, pp. 158-159; *Delpiano Giuseppe*, «La Scuola Nazionale», vol. XI, n. 15, 18 January 1900, pp. 233-235; *Cornaglia Teresa*, «La Scuola Nazionale», vol. XI, n. 27, 12 April 1900, p. 431; *Prada don Pietro*, «La Scuola Nazionale», vol. XI, n. 28, 19 April 1900, p. 442; and *Conti Maria*, «La Scuola Nazionale», vol. XI, n. 34, 31 May 1900, p. 541.

<sup>39</sup> *Ruffino Guido*, «La Scuola Nazionale», vol. IX, n. 1, 14 October 1897, p. 15. See also *Riccardi Francesco*, «La Scuola Nazionale», vol. XII, n. 39, 15 July 1901, p. 632.

<sup>40</sup> *Nardi Raffaello*, «L'Osservatore Scolastico», vol. XXV, n. 25, 25 March 1890, pp. 399-400.

their work, «under the weight of an excessive work that slowly undermined their existence»<sup>41</sup>.

The pages of «La Scuola nazionale» were full of references to the «drama» that united «many unlucky teachers», and that often affected their families, thus describing a particularly difficult situation. Think, for example, to the case of the teacher of Turin Nicola Fabre, who «died suddenly while performing his own duty, as a good soldier who falls in the battle!»<sup>42</sup>; to the one of the «best municipal teacher» of Turin, Sofia Moretti, «died in the battle» after a «long and zealous service» that had made her a true «martyr of the school»<sup>43</sup>, and to that of the «zealous teacher» Domenico Dogliani, a «true soldier of duty», also prematurely «dead in the battle»<sup>44</sup>.

In the column *Obituaries* of the magazine, finally, there were «the pitiful stories» of two teachers become headmaster and school inspector, who, after their premature death, could not ensure a decent future to their families. They were the school inspector of Velletri, Vincenslao Saluzzi, who «died in the battle, as a soldier, regretful because he could not leave a modest pension to his widow and his honest daughters for not having completed the years of service required by the law»<sup>45</sup>; and of the director of the normal female Royal School of Noto, Demetrio De Grazia, who left «his wife and four children in the depths of despair and, moreover, they can not even enjoy his pension»<sup>46</sup>.

The above mentioned examples proved how teachers and primary and popular school were still far from being recognized for their essential role in the «moral and civil improvement of the populations» and in the promotion, among new generations, of a feeling of «belonging to the Nation». They were two stories showing that, beyond the useless and abused rhetoric formulations and vague statements granted, «at every steps», by the «representatives of the Government and Parliament», a time in which the Italian elementary teachers could be «recognized for their full rights» and could «receive from the Nation a treatment that is not considered a favour»<sup>47</sup> was still far.

<sup>41</sup> *Tegon Carlo*, «L'Osservatore Scolastico», vol. XXXI, n. 13, 4 January 1896, p. 153.

<sup>42</sup> *Fabre Nicola*, «La Scuola Nazionale», vol. I, n. 9, 8 January 1890, p. 140.

<sup>43</sup> *Moretti Sofia*, «La Scuola Nazionale», vol. I, n. 23, 16 April 1890, p. 364.

<sup>44</sup> *Dogliani Domenico*, «La Scuola Nazionale», vol. VII, n. 30, 7 May 1896, p. 479.

<sup>45</sup> *Saluzzi Vincenslao*, «La Scuola Nazionale», vol. XI, n. 11, 21 December 1899, p. 173.

<sup>46</sup> *De Grazia Demetrio*, «La Scuola Nazionale», vol. XII, n. 41, 26 August 1901, p. 663.

<sup>47</sup> *Pasotti Giuseppe*, «La Scuola Nazionale», vol. I, n. 11, 23 January 1890, p. 171.



3. *In defense of the «humble workers of the thought, sweating and struggling for the children of the Nation». The magazine «L'Unione dei maestri elementari d'Italia» and the battles for the improvement of the teachers' category and the spread of popular education at the turn of the nineteenth and twentieth century*

The long-lived subalpine magazine «L'Unione dei maestri elementari d'Italia» (1870-1920), founded with the aim of «protecting the rights of the teachers considered “worse than the bell-ringer, the undertaker, the country guard”», strongly supported the battle for the entrustment of the elementary schools to the State and, since the eighties, it also supported the activity of the Pedagogical Association among the teachers of normal schools, being committed in the renewal of the pedagogical and educational culture in the light of the new positivist scientific theories. In 1901, moreover, it supported, along with Luigi Credaro, the Unione Magistrale Nazionale – National Teachers' Union (UMN)<sup>48</sup> and, in the following years, it promoted a prudent school reformism inspired to the ideas of the liberal groups close to Sidney Sonnino and to the «Nuova Antologia»: it criticised Giolitti's school policy, showing a constant mistrust towards the proposals of the Catholic community and the socialists<sup>49</sup>.

These issues, and in particular those concerning the improvement of the conditions of the teachers' category, were also treated in a column of the magazine called, at the beginning, «Brief *obituaries*» and then «Obituary Register», published for half a century in order to «maintain alive the memory» of those who had «sacrificed their lives» to «educate the people's sons»<sup>50</sup>.

The image of the elementary school teacher given, from the beginning of the seventies, by the *obituaries* published in «L'Unione dei maestri elementari d'Italia» is that of a «humble worker of the thought», who «came from the people» and «entirely devoted to the redemption of the people», a true «apostle of the school» animated only by «his sense of duty», and whose teachings are full of «all the Christian and civil virtues»<sup>51</sup>. It is not a case, in this regard, that in commemorating the many elementary teachers disappeared in that period, the magazine of Turin paid a special attention to those who

<sup>48</sup> See A. Barausse, *L'Unione Magistrale Nazionale. Dalle origini al fascismo 1901-1925*, Brescia, La Scuola, 2002.

<sup>49</sup> On «L'Unione dei maestri elementari d'Italia» (1870-1920) see in particular: G. Chiosso, *Unione (L') dei Maestri Elementari d'Italia*, in Id. (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, cit., pp. 422-424; and Id., *Unione (L') dei Maestri Elementari d'Italia*, in Id. (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 705-707.

<sup>50</sup> Picco Giuseppe, «L'Unione dei maestri elementari d'Italia», vol. X, n. 10, 15 May 1879, p. 154. See also Guglielmi Antonio, «L'Unione dei maestri elementari d'Italia», vol. X, n. 10, 15 May 1879, p. 155.

<sup>51</sup> Manzi Domenico, «L'Unione dei maestri elementari d'Italia», vol. X, n. 10, 15 May 1879, pp. 154-155, See also Costantini Bortolo, «L'Unione dei maestri elementari d'Italia», vol. XI, n. 11, 1 June 1880, p. 170.

«prematurely died while educating and instructing with paternal affection the young people» entrusted to their «diligent cares»<sup>52</sup>: they constituted an ideal gallery of «martyrs» of the school and popular education:

The death of young teachers – it was stated in an *obituary* printed in August 1880 – is a terrible explanation of their efforts and their miseries! How many of them die prematurely for the bravery, the enthusiasm, the self-sacrifice to their noble role! How many of them won the obstinacy of the times with their sacrifices! They were often, or almost always, closed in narrow, pestilential, noisy places, thus destroying even the vitality of the younger and stronger teachers; they are vivid flowers drying up on their stem. [...] But they do not stop, do not swear at the ingratitude and social injustice; but they endure with resignation the hardships, the agony, the death!<sup>53</sup>

«L'Unione dei maestri elementari d'Italia», in this regard, celebrated the «exemplary lives» of the teacher Giuseppe Picco from Musso Valle inferiore, who, «always inspired by a sense of duty», for over 25 years had distributed «with a lot of love» «the secrets of the virtue and knowledge» to his «numerous schoolchildren»<sup>54</sup>; and the teacher Domenico Manzi, who worked for many years in the area of Savona and was «a victim of his tireless zeal and great love in educating the people's sons»<sup>55</sup>; as well as those of the primary teachers Antonio Ramello, who «had worn out his life in the study and education of the youth»<sup>56</sup>; and Margherita Baratelli, the «humble and hardworking» teacher of Bassignana, «good and friendly with everyone», who, at the cost of enormous sacrifices, was able to teach «the way of virtue and knowledge, showing what the true civilization and true progress were»<sup>57</sup> to the youth of the small village located in the province of Alessandria.

The *obituaries* of the disappeared elementary teachers, published at the turn of the twentieth century, emphasized the «lively intelligence», the «teaching competence», the «zeal for the education and instruction of the people» and the «excessive attachment to school duties» of the «many martyrs of the alphabet» who «in times of profiteering and superficial culture», were «committed in the public education in the various provinces» of the kingdom<sup>58</sup>. But they were

<sup>52</sup> *Ramello Antonio*, «L'Unione dei maestri elementari d'Italia», vol. XI, n. 9, 4 May 1880, p. 138.

<sup>53</sup> *Mastrantonio Antonio*, «L'Unione dei maestri elementari d'Italia», vol. XI, n. 15, 1 August 1880, p. 232.

<sup>54</sup> *Picco Giuseppe*, cit., p. 154. See also *Capponi Domenico*, «L'Unione dei maestri elementari d'Italia», vol. X, n. 17, 1 September 1879, p. 265.

<sup>55</sup> *Manzi Domenico*, cit., pp. 154-155. See also *Costantini Bortolo*, «L'Unione dei maestri elementari d'Italia», vol. XI, n. 11, 1 June 1880, p. 170.

<sup>56</sup> *Ramello Antonio*, «L'Unione dei maestri elementari d'Italia», vol. XI, n. 9, 4 May 1880, p. 138.

<sup>57</sup> *Baratelli Margherita*, «L'Unione dei maestri elementari d'Italia», vol. XII, n. 1, 1 November 1880, p. 12.

<sup>58</sup> See *Bergamaschi David*, «L'Unione dei maestri elementari d'Italia», vol. XXXV, n. 25, 31 March 1904, p. 197; *Cavallero Sebastiano*, «L'Unione dei maestri elementari d'Italia», vol. XXXV, n. 27, 14 April 1904, p. 216; *Lario De Quiros Antonio*, «L'Unione dei maestri elementari d'Italia», vol. XXXV, n. 35, 9 June 1904, p. 274; *Lecchi Teresa*, «L'Unione dei maestri elementari

also aimed at a sort of hagiographical narration in order to create an image of a primary school teacher as a modern *secular saint*, whose «Christian and civil virtues», performed in the highest degree, made him the first and most authentic «author of the moral and civil rebirth of the nation».

So, for example, «L'Unione dei maestri elementari d'Italia», reporting, in September 1907, the death of the primary school teacher of Castronovo in the province of Palermo, Giovanni Ninetti, «valiant educator» and «virtuous citizen», emphasized the rare qualities of his soul that always inspired him, allowing him to fully realize his vocation as a teacher and educator of the people:

He was a zealous educator, with an elected mind, and a good heart – the *obituary* of the teacher Giovanni Ninetti said – he never came to a compromise with his consciousness, he always said the truth, he was never unfair or coward. He carried out with competence and attention, in the course of his long career, his apostolate. He left traces of his wisdom, of his firmness in intentions, of his tireless zeal and austere temperament; he did not strive for honors, distinctions, or favours; he was only satisfied if his work was useful to the people's children, to whom he taught – for more than seven decades – with the intelligence of love, and always with authority, [...] thus gaining the satisfaction of his students and their families, which surrounded him with their respect and profound veneration<sup>59</sup>.

The above mentioned themes can also be found in several other *obituaries* published in the magazine of Turin during those same years. So, the teacher Gaetano Catalano from Calabria was celebrated because he, in carrying out, «always with a particular zeal», the «difficult task of popular education», «never came to a compromise with his conscience, he was never unfair, he always said the truth, he was never coward, he never asked favours. His life was pure and he died in poverty»<sup>60</sup>. The «brave teacher Archimede Grimaldi» from Bastiglia, in the province of Modena, was celebrated for having been «for thirty-five years an exemplary teacher committed to popular education»:

Noble and loyal in his character, generous and open to every feeling of goodness and justice – the *obituary* for Grimaldi stated in the conclusion – was loved by all the authorities, the colleagues, and his friends who respected him for his elected virtues of heart and mind<sup>61</sup>.

d'Italia», vol. XXXVII, n. 17, 1 February 1906, p. 141; *Laterza Vito*, «L'Unione dei maestri elementari d'Italia», vol. XXXVII, n. 24, 9 March 1906, p. 180; *Camelli suor Adalgisa*, «L'Unione dei maestri elementari d'Italia», vol. XXXVIII, n. 14, 10 January 1907, p. 118; and *Calabresi Carlo*, «L'Unione dei maestri elementari d'Italia», vol. XXXVIII, n. 24, 21 March 1907, p. 182.

<sup>59</sup> *Ninetti Giovanni*, «L'Unione dei maestri elementari d'Italia», vol. XXXVIII, n. 42, 15-20 September 1907, p. 244.

<sup>60</sup> *Catalano Gaetano*, «L'Unione dei maestri elementari d'Italia», vol. XXXVIII, n. 24, 21 March 1907, p. 182.

<sup>61</sup> *Grimaldi Archimede*, «L'Unione dei maestri elementari d'Italia», vol. XXXIX, n. 35, 23 July 1908, p. 266.

Since the early twentieth century, the *obituaries* published on «L'Unione dei maestri elementari d'Italia» recognized for the first time the efforts made by the disappeared teachers in «the organization of the teachers' forces» and for the development of associations of the category. Beside the idea of the teacher as the author of the fight against illiteracy, promoter of popular education and the main protagonist of the ethical and civic education and the promotion of a national feeling among the younger generation, a gradually increasing importance was acquired by the model of the «militant» and «propagandist» teacher, personally committed in the initiatives undertaken by local teachers' associations and, at a national level, by the UMN of Luigi Credaro, whose work for the improvement of the living and working conditions of the primary school teachers and for the strengthening of popular education is now considered fundamental for the *teachers' identity*.

In this regard, the emphasis with which, in March 1904, was reported the death of the «hardworking and wise» teacher of Oneglia, Giuseppe Amoretti, a «primary school teacher for over 50 years», was particularly important. The *obituary* emphasized his commitment to the establishment of the local association of mutual aid between the teachers and the support offered at the beginning of the century by the association to the foundation of UMN<sup>62</sup>.

Amoretti, however, is not an isolated case. Think, for example, to the *obituary* appeared on the magazine of Turin in April 1909 for the teacher and director of the civic schools of Genoa Giovanni Battista Caprile, who is remembered especially for the role of «President of the Teachers' Union of Liguria», carried out with «commendable zeal» and with excellent results<sup>63</sup>. In the following years, the vast majority of the *obituaries* published in «L'Unione dei maestri elementari d'Italia» called the reader's attention on the role of «authoritative organizer of the teachers' forces in the province»<sup>64</sup>, on that of «intelligent and tireless organizer of the teachers' category»<sup>65</sup> and, finally, on that of «bright figure of organizer of the teachers' forces»<sup>66</sup> of the many

<sup>62</sup> Amoretti Giuseppe, «L'Unione dei maestri elementari d'Italia», vol. XXXV, n. 22, 10 March 1904, p. 168.

<sup>63</sup> Caprile Giovanni Battista, «L'Unione dei maestri elementari d'Italia», vol. XL, n. 27, 29 April 1909, p. 227.

<sup>64</sup> Baudino Ippolito, «L'Unione dei maestri elementari d'Italia», vol. XLIII, n. 13, 5 January 1911, p. 105.

<sup>65</sup> Maneglia Pietro, «L'Unione dei maestri elementari d'Italia», vol. XLIV, n. 39, 30 August 1912, p. 308.

<sup>66</sup> Abelly Goffredo, «L'Unione dei maestri elementari d'Italia», vol. XLV, n. 24, 10 April 1913, p. 337.

deceased teachers<sup>67</sup>, repeating several times how this commitment to the associations constituted the most appropriate way of supporting the revival of the teachers' category, thus creating the basis for the establishment of the popular school in Italy<sup>68</sup>.

<sup>67</sup> See *Bertola Giovanni*, «L'Unione dei maestri elementari d'Italia», vol. XL, n. 13, 7 January 1909, p. 102; *Stuardi Andrea*, «L'Unione dei maestri elementari d'Italia», vol. XL, n. 40, 1 September 1909, p. 308; *Grimaldi Clodomiro*, «L'Unione dei maestri elementari d'Italia», vol. XLI, n. 13, 6 January 1910, p. 100; *Iannuzzi Silvio*, «L'Unione dei maestri elementari d'Italia», vol. XLII, n. 38, 30 July 1910, p. 298; *Armano Giuseppe*, «L'Unione dei maestri elementari d'Italia», vol. XLIII, n. 21, 9 March 1911, p. 112; *Lantermino Luigi*, «L'Unione dei maestri elementari d'Italia», vol. XLIII, n. 37, 30 July 1911, p. 289; and *Sesia Caterina*, «L'Unione dei maestri elementari d'Italia», vol. XLV, n. 13, 9 January 1913, p. 171.

<sup>68</sup> *Bonaglia Firmino*, «L'Unione dei maestri elementari d'Italia», vol. XLIII, n. 24, 30 March 1911, p. 182.



# History and Educational Argument. History, Education and History of Education in the Crisis of the First Modernity

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**ABSTRACT:** In the background of Rationalism and in the course of Modernity, history, as a discourse, rationality, memory and «master of life», and education, as a rational order of present and regarding to construct the future, met each other. History constitutes the foundation, condition and meaning behind education. Education was at the basis of Modernity. History is a retrospective vision of the process and the degree of development that humanity has achieved. Education encompasses conduction and transformation. The crisis and break away from the scholastic, in the transition from the first Modernity, are correlatives of the affirmation of history as a subject, with a discourse, a method and a curricular status. One century later, at the end of XIX century, history and education met each other as history of education and educational argument for a re-elaboration of memory-experience, with a projective sense. Thinking out education with history has conferred the historian and historiographical (in)formation an irreplaceable position and a contribution in the equation of the present. I propose to document these ideas, with a European view and including a reference to the Portuguese case.

**EET/TEE KEYWORDS:** History; History of education; Educational argument; XIX<sup>th</sup> Century.

## *History and education – the Modernity binomial*

In the background of 18<sup>th</sup> century Rationalism and throughout the course of Modernity, education and history came together and were developed in a basically epistemic and procedural framework. History maintains its prerogatives of inquiry about human reasoning and deeds, discourse, experience,

collective memory and «master of life». At the same time, education remained as the present rational and order, and as the construction of the future, on the individual, socio-community and humanitarian level.

The centrality of the concept of the social contract, which incorporates natural evolution and cultural evolution, civilizing progress, the perfecting of humanity, tightened the bond between history and education. Education is at the basis of Modernity. In its social, political, biographical, hagiographical, prosopographical facets, history began to constitute a foundation, condition and meaning for education. In Kant's (1724-1804), acceptance of the human condition, it is based on a *bildung* that incorporates discipline and culture in the human subjects, which becomes preventive and ensures prudence and a morality. History is a retrospective vision of the process and the degree of development that mankind has attained; in Condorcet's (1743-1794) acceptance it safeguards a guarantee of the future. But history also, in Fichte's (1776-1841), perspective, provides a limit and a meaning for education and for human and social evolution. Education incorporates moving forward and transformation, history enables the discovery of the evolutionary meaning of humanity and simultaneously brings the guarantee of future, documenting and presenting the past under the modality of process.

One century later, in Dewey's (1859-1952) thinking, history and education are also a condition of the present. According to him, the educational present corresponds to the reconstruction of experience, which results in clarification of education's meaning, and strengthens the aptitude of the subject and human society to steer the course of future experiences. Present action, education is a reworking of memory-experience, with a projective meaning. Benedict Croce (1860-1952) has remembered that history is *magistra vitae* because it irrupts from the present and unifies the past with the contemporaneous interests.

In the 18<sup>th</sup> century discourse, in overcoming the stories of heroes, saints and personalities, the History of the nations, the political regimes, the social and cultural processes and the ways of thinking, what was constituted as material was discourse, meaning and rationality for Education. History made itself education. The historiographic discourse continued to accommodate different versions: Past news, memories, chronicles, historical narratives. Within the scope of the state school proto-systems, namely the Prussian, Portuguese and French models, history, written and spoken in vernacular became the basis for a rationality of change and the root of the Nations-States. Ordered chronologically, history emerged geared towards patriotic integration, identity and trumpeting.

As the root and justification of the nations' constitutive process, the historical narrative gave meaning and sequence to human and material progress, and enshrined the geography. As an erudite formula and rhetorical exercise, it served the recreation, the apprenticeship and the perfecting of lettered education, in different forums of memorisation and sociability. As a



model and *magistra vitae* it integrated the school curriculum, ensuring civic and patriotic initiation. As information and recreation of experience, history became part of the standard training of teachers, namely one of the subjects that were included in the teacher training Seminar which functioned in Vienna, from 1771 onward.

The crisis and the rupture with scholasticism, in the transition from the first Modernity, were correlatives of affirmation of history as a subject, with a discourse, a method and a curricular status. In the educational present, the past and the future cross paths. In the long Modernity that began with the Enlightenment of the eighteenth century, thinking education with history elevated the historian and the historiographic training (information) to an irreplaceable position and contribution in the equation of the present. The Enlightenment put history at the basis of educational reason.

The Enlightenment put history at the basis of educational reason, bringing historical education and the history of education together. This was the genesis of the history of education even if the history of ideas about education and the history of education itself had not arisen simultaneously, or evolved at the same pace. In the pedagogical framework of Jean-Frederic Herbart (1776-1841), history, as information of a civic and patriotic recreation, became part of the general pedagogical system.

### *History in education*

In the discourse of the *Ancient Régime*, history was construed as a prolegomenon, method and argument. Francis Bacon (1561-1626) carried out an analysis of the scientific system and recognised that «Histories make men Wise; Poets Witty; The Mathematics Subtle; Natural Philosophy deep; Moral Grave; Logic and Rhetoric able to Contend»<sup>1</sup>. A contemporary of Bacon's, René Descartes (1596-1650), recognised that history was an appeal to the spirit. In making the prevalence of the present as the sustenance of truth «I think, therefore I am – the first principle of philosophy that I searched for»<sup>2</sup>, Descartes analysed and registered the progress of his own thinking as an explanatory process. Likewise, referring to algebra, he distinguished the «analysis of the old to the algebra of the modern»<sup>3</sup>. Upon publication in 1689 of his *An Essay Concerning Human Understanding*, John Locke (1623-1704) referred to the strength of conviction of historical truth: «I would not be thought here to

<sup>1</sup> F. Bacon, *Essais*, Paris, Aubier, Éditions Montaigne, 1939, p. 264.

<sup>2</sup> R. Descartes, *Discurso do Método. As Paixões da Alma*, Lisboa, Livraria Sá da Costa, 1992, p. 28.

<sup>3</sup> *Ibid.*, p. 17.

lessen the credit and use of *history*: ‘tis all the light we have in many cases; and we receive from it a great part of the useful truths we have, with convincing evidence»<sup>4</sup>.

Giambattista Vico (1668-1744), in classifying as undeniable the principle that «the world of nations was certainly made by men, hence the reason behind it must be found within the modifications of our own human mind»<sup>5</sup>, made the teaching of history inevitable, including to children.

In the book *Compêndio Histórico do Estado da Universidade de Coimbra* [Historical Compendium of the State of Coimbra University], written in 1771, and which served as a backup for the *Marquês de Pombal* Reform of that University, the significance of History in education was recognised, namely in the education of Theologians and the training of Magistrates:

There is no kind of History, be it Sacred or Secular, be it Natural or Civil, be it Literature of Philosophical, that cannot be recognised as being useful and necessary to Theology because they all shed admirable light to prove and illustrate the Theological issues [...]. Science of a Theology comprises two things: first, and mainly, deep knowledge of the doctrine of the scriptures in each point of Theology: second, being instructed in Tradition, which is the infallible rule to understand the true meaning of the scripture, because Tradition equally contains Revelation of many truths, which were not written in the Divine Books<sup>6</sup>.

The method «that many skilful Theologians used to explain Theology [...] was to deal with it in the same way as History»<sup>7</sup>. In the mentioned *Compêndio Histórico*, the virtues of the historical method were thus summarised:

And in truth those who intelligently weigh up the utility of the same method will certainly realise it is the most suitable way to fully expose the light of the Doctrine of the Church, and to defeat the errors of alternative means: Indeed, who would have such a lack of reason that they do not recognise the truth of a Doctrine, that can see through certain proofs, and incontestable facts, the origin of the same God, and persist always consistent and invariable in the Church, and universally taught by the Shepherds, Doctors and all the Centuries, and all time?<sup>8</sup>

Likewise, the authors of the same *Compêndio Histórico do Estado da Universidade de Coimbra*, sought to illustrate and show that Literary History is «an indispensable aid for the jurist»<sup>9</sup>. Multiple allegations were brought forth to argue this case:

<sup>4</sup> J. Locke, *An Essay Concerning Human Understanding*, London, Penguin Books, 2004, p. 586.

<sup>5</sup> Cf. P. Gardiner, *Teorias da História*, Lisboa, Fundação Calouste Gulbenkian, 1995, p. 24.

<sup>6</sup> *Compêndio Histórico do Estado da Universidade de Coimbra (1771)*, Coimbra, Por Ordem da Universidade, 1972, pp. 117-118.

<sup>7</sup> *Ibid.*, p. 119.

<sup>8</sup> *Ibid.*

<sup>9</sup> *Ibid.*, p. 236.

For so many, and such multiplicity of advantages, the Literary History of Jurisprudence is generally reputed to be one of the foremost Subjects of the Study of Law. No Writer of good taste fails to grasp it as such. For this reason it has proudly occupied the quills of many Authors, who have worked with it to facilitate their Study, publishing Institutions, and Compendiums of one and other Jurisprudence, some of them very specific, and extremely profitable for the School lessons. And not content only with having enriched the Republic of Letters with these useful compositions, they also began to pen Libraries, Biographies, Weighty Dictionaries, Dissertations and Programmes, aimed at persuading this useful Study, and prescribing the fair limits, so as not to degenerate into abusive redundancy<sup>10</sup>.

With the Reform of Coimbra University, most of the subjects started to be introduced through the genealogy of the process of constitution and the evolution of the main methodical guidelines. History became a regular subject in the Curriculum of Colleges of Lower Studies. Hence, at the Royal College of Alcobaça, of the Congregation of S. Bernardo, which played an essential role in drawing up the History of Portugal, the programme of this subject commenced as follows:

Universal History, this Master of Life, justly reputed by the faculty, that entertains and uses the most profitable Men, is a study that is of incomparable interest to Mankind, and towards which all the application that could be established in our Royal College of Alcobaça would be small<sup>11</sup>.

On the pedagogical side, Jean-Jacques Rousseau (1712-1778) countered the historical perspective to the experimentalism of the physical sciences and took history as the critical and unbiased judge. Rousseau intended to instruct Émile through principles, without falling into a metaphysical arguments that the latter would not be prepared to understand; or without mixing lessons «qui ressemblent à des leçons, de substituer dans son esprit l'expérience et l'autorité du maître à sa propre expérience et au progrès de sa raison»<sup>12</sup>. To free himself simultaneously from these two obstacles and to appeal to the human heart without destroying it, he proposed «lui montrer les hommes au loin, les lui montrer dans d'autres tems ou dans d'autres lieux, et de sorte qu'il put voir la scène sans jamais y pouvoir agir»<sup>13</sup>. Thus, it is, concluded Rousseau, history's moment. It is through history that Émile would read into the hearts without the lessons of philosophy. And man would become a «simple spectateur, sans interest et sans passion, comme leur juge, non comme leur complice, ni comme leur accusateur»<sup>14</sup>. As such, Rousseau advanced that history should not restrict itself to the wars and injustices.

<sup>10</sup> *Ibid.*, p. 242.

<sup>11</sup> *Regulations of the Schools of the College of Alcobaça*, s.e., 1776, p. 53.

<sup>12</sup> J.-J. Rousseau, *Émile ou de l'Éducation*, Paris, Gallimard, 1969, p. 362.

<sup>13</sup> *Ibid.*, p. 362.

<sup>14</sup> *Ibid.*

The curricular reorganisation of the French schools, brought about at the end of the *Ancient Régime*, included broadening the teaching of History, above all the History of France. This happened in the *Colégio Louis-le-Grand*, where from 1769 onwards it became compulsory to have half an hour of History study on public holidays – Sundays and festival days, and at the *Colégio de Arras*<sup>15</sup>. Philosophical history attracted readers, but the discursive and intellectual content was too modern to be taught. The teaching continued to focus essentially on chronology, associated to geography, but history was no longer taught merely as a complement of the classical subjects.

Kant took the Enlightenment as the path and possibility of a history of mankind and commitment among successive generations. In the lessons on Pedagogy, collected in 1803, he made an express observation on the importance of history in education, so long as it did not become an extra burden for the memory:

Hasta ahora no se há encontrado todavía ninguno a propósito para la historia; se han ensayado unas tablas; sin embargo, parece que no dan buenos resultados. La historia es un excelente médio para ejercitar en el juicio al entendimiento<sup>16</sup>.

Heavily influenced by the universality of history, Johann Gottfried Herder (1744-1803) established the pre-eminence of mankind's living forces as «springs of human history» and stated the principle of the variety and individuality owed to each nation. In his opinion, the evolution of humanity will lead to the fruition of all that is wise and good, but history unlocks the reasoning and justice of other eras.

History gathers together everything that is linked to the human sciences. Condorcet (1743-1794), the author of an essay on the evolution of the Human Spirit, suggests that history should be part of common instruction and should be taught from the second level of education. The syllabus of this level of education comprised two components: common instruction and teaching through subjects, whereby the former involved the most basic knowledge that was accessible to the intelligence «la plus ordinaire»<sup>17</sup>. In common instruction, history was simplified to the «des éléments d'histoire»<sup>18</sup> linked to elements of geography. Lasting four years, the science components would be taught separately, with each one entrusted to its particular master and distributed as follows:

<sup>15</sup> F. Furet, *A Oficina da História*, Lisboa, Gradiva, s.d., p. 117.

<sup>16</sup> E. Kant, *Pedagogía*, Madrid, Akal, 1983, p. 64.

<sup>17</sup> M. Condorcet, *Cinq Mémoires sur l'Instruction Publique*, Paris, Flammarion, 1994, p. 133.

<sup>18</sup> *Ibid.*, p. 134.

Les sciences morales et politiques, les sciences physiques fondées sur l'observation et l'expérience, les mathématiques et les parties des sciences physiques fondées le calcul; enfin l'histoire et la géographie politique, qu'on pourrait confier à un maître qui en même temps enseignerait la grammaire et l'art d'exprimer ses idées<sup>19</sup>.

Concluding that the knowledge contained in history accounts and geography was acquired more effectively through reading, Condorcet believed that the explanation should be backed up by presenting, in chronological order, each epoch and the distribution of mankind around the globe, their status, their divisions and the names of the men who had had the biggest influence. This empirical information would pave the way for the learner to access a philosophy of history:

En apprenant ainsi à ordonner, soit dans le temps, soit dans l'espace, les faits et les observations de tout genre qui nous ont été transmis, on s'habituerait à en saisir les liaisons et les rapports, et on saurait se créer pour soi-même la philosophie de l'histoire à mesure que dans la suite on en étudierait les détails<sup>20</sup>.

The subject of History began to incorporate the curricular system with substantive and educational aims. Jean-Frederic Herbart, who believed that the education of citizens was a responsibility of the State and adapted the school education system to the growth cycles of children and adolescents, attributed history second place in the system of school subjects, straight after religion, which was itself taught using the historical method. In childhood, the curricular method was stories, which in adolescence gave way to history. In the third phase of childhood, the youth would move into adulthood, observing the retreating of "government" in place of "discipline". Often, according to Herbart's presupposition, the youth «peut et doit intervenir, pour établir l'ordre dans la société des enfants, particulièrement en ce qui concerne les liaisons volontaires, les considérations personnelles, et même les usurpations de pouvoir, qu'on voit assez fréquemment dans leur société»<sup>21</sup>. At this age the essential aspect is to teach, which should prevent ideas from starting to circulate prematurely. Among the teaching material is poetry and history,

sur lesquelles l'enseignement doit s'appuyer, pour former les idées morales. L'idée de la bienveillance nous amène à la nécessité de l'éducation religieuse; or, la religion repose sur des histoires, il faut donc également enseigner l'histoire sainte, comme faisant partie de l'enseignement historique<sup>22</sup>.

<sup>19</sup> Condorcet, *Cinq Mémoires sur l'Instruction Publique*, cit., p. 134.

<sup>20</sup> *Ibid.*, p. 137.

<sup>21</sup> L. Gockler, *La Pédagogie de Herbart*, Paris, Librairie Hachette, 1903, p. 264.

<sup>22</sup> *Id.*, *La Pédagogie de Herbart*, cit., p. 265.

History «doit être le précepteur de l'humanité et s'il n'en est pas ainsi, la faute en est en grande partie aux maîtres qui l'enseignent à la jeunesse»<sup>23</sup>. But, for history to be educational, Herbart explained that, both in the teaching of general history, and in the specific teaching, there should be less emphasis on knowledge of wars than «donner une base à l'édifice de l'histoire; par exemple, pour le moyen âge, il faudrait soigneusement mettre en lumière et expliquer l'islamisme, la papauté, l'empire et la féodalité, et ainsi de suite»<sup>24</sup>. The system of subjects proposed by Herbart should be uniform in all schools, although the teaching could vary. In addition to those two subjects, such a system should include: mathematics and natural sciences; geography; languages.

### *History in the transition from Ancient Régime*

In the transition from *Ancient Régime* history served as the argument for decision making, the interruption and reform of processes, movements and trends. History was the condition to distinguish the old from the modern. The status of history varied and took on different configurations: tradition, grounds for change, reform. Nearer the legal process, it was common to use historiographic ordering to update polemics and prepare the ground for the decision. Reinitiated and reviewed in different historical cycles, the opposition between the Old and the Modern was evident in the transition from *Ancient Régime*, whereby the methodical combination of analysis, deduction and induction, undertaken on the genealogy, enabled the distinction between tradition and antiquity. The tradition and the Old, although part of the same hemisphere, were now characterised and viewed in different ways. Tradition focused on what was prolonged over time in a continuous and uniform way. On the other hand, the discourse and the evolution of the Old were firmly referenced in specific periods. Submitted to a chronological deduction, very often periods were dealt with whose evolution resulted in decadence or depression in contrast to expectations and to the background in which these expectations had been legitimate. It was in view of the Old and not to go against tradition that, throughout the course of Modernity, the Modern define and arrange themselves as the bearers of change. Underlying the change was the updating of tradition, but not its disappearance.

Tradition would be enlightened through information and through transmission. Fontenelle (1657-1757), in his *Digression sur les Anciens et les Modernes* (1688), proclaimed that the evolution of mankind was explained by the influence of the Old on the Modern, given that, where possible, the latter learns from the former:

<sup>23</sup> *Ibid.*, p. 274.

<sup>24</sup> *Ibid.*

La facilité qu'ont les esprits à se former les uns sur les autres, fait que les peuples ne conservent pas l'esprit original qu'ils tireraient de leur climat. La lecture des livres grecs produit en nous le même effet à proportion que si nous n'épousions que des Grecques à [...]. Afin que les Modernes puissent toujours enchérir sur les Anciens, il faut que les choses soient d'une espèce à le permettre. [...] Un bon esprit cultivé est, pour ainsi dire, composé de tous les esprits des siècles précédents; ce n'est qu'un même esprit qui s'est cultivé pendant tout ce temps-là<sup>25</sup>.

Giambattista Vico classified as undeniable the principle that the world and the nations were made by men. Kant viewed the Enlightenment as the path and the possibility to enable

the history of mankind, as a whole, [to be viewed] as the undertaking of a hidden plan of nature, in order to establish an internally perfect political constitution – and, in pursuit of this goal, perfect also from the external point of view, as this is the only way that nature can fully develop all of humanity's inclinations<sup>26</sup>.

Such a desire contains a commitment between the States and elucidated men, whereby the latter influence the governing principles of the former. Therefore, the writing of history should not only take into account the *empíria* but should also accommodate the idea of universal history. Kant made the distinction between erudite history, owed to the *antiquii*, and philosophical history. In 1784, asking himself whether his own time was an 'époque éclairée', he answered: «non! Mais bien [...] une époque d'*accession aux Lumières*»<sup>27</sup>. In publishing the essay entitled *Idée d'une Histoire Universelle au Point de Vue Cosmopolitique* in the same year of 1784, Kant introduced the notion of a history of humanity geared towards the present, which would not be satisfied by:

chanter la magnificence et la sagesse de la création dans le domaine de la nature où la raison est absente [admitia assim] qu'une tête philosophique (qui, para ailleurs, devrait être très avertie des problèmes historiques) pourrait encore tenter de faire en se plaçant à un autre point de vue: En outre la minutie, louable sans doute, avec laquelle on rédige à présent l'histoire contemporaine, doit malgré tout faire naître naturellement en chacun une inquiétude: celle de savoir comment nos descendants éloignés s'y prendront pour soulever le fardeau de l'histoire que nous pourrions leur laisser d'ici quelques siècles<sup>28</sup>.

Incorporation of tradition was the characteristic of the Nation States that arose out of the transition from *Ancient Régime* as a process bringing together and harmonising a nationalist conscience and to enroot a mother tongue. History allowed tradition to be salvaged and the construction of the new, which emerged as a counterpoint, legitimised by the belief in progress

<sup>25</sup> M. Fumaroli, *La Querelle des Anciens et des Modernes, XVII<sup>e</sup>-XVIII<sup>e</sup> Siècles*, Paris, Gallimard, 2001, pp. 297, 301, 307.

<sup>26</sup> Gardiner, *Teorias da História*, cit., p. 37.

<sup>27</sup> E. Kant, *Qu'Est-ce que les Lumières?*, Paris, Hatier, 2007, p. 12.

<sup>28</sup> Id., *Opuscules sur l'Histoire*, Paris, Flammarion, 1990, pp. 88-89.

and development. The notion of future, resulting from reforms or the fruit of revolutionary transformations was associated with the new.

Herder made a history of nations possible, in arguing as a universal law of history that [...] everywhere on earth, everything happens that can happen, partly in line with the situation and the needs of the place, partly in line with the natural or acquired character of the people. [...] Times, places, national characters – to sum up the combined action of the living forces in their most specific individualities – alone are what lie behind all the events that occur in the kingdom of men, in the same way as they decide the phenomena of nature<sup>29</sup>.

Centring history on the human gave rise to an inevitability of events, within certain national, temporal and local circumstances and dictated that «the history of humanity is nothing more than a natural history of forces, of actions and of human trends, subordinated to the place and epoch»<sup>30</sup>.

Meanwhile, according to the French revolutionaries, history went beyond the national genealogy and constituted a general framework and meaning for evolution, accommodating change and containing a social dimension. Alexis Tocqueville (1805-1859) who, seven years after the French Revolution, travelled through the United States of America to recognise historical evolution, did not fail to register new matters. Among these, his attention was especially attracted to a completely new subject: the equality of conditions<sup>31</sup>. Consequently, a change was taking place in the United States in the relationship between the governors and the governed:

Instruire la démocratie, ranimer s'il se peut ses croyances, purifier ses mœurs, régler ses mouvements, substituer peu à peu la science des affaires à son inexpérience, la connaissance de ses vrais intérêts à ses aveugles instincts; adapter son gouvernement aux temps et aux lieux; le modifier suivant les circonstances et les hommes: tel est le premier des devoirs imposé de nos jours à ceux qui dirigent la société. Il faut une science politique nouvelle à un monde tout nouveau<sup>32</sup>.

With the first liberal and romantic generation, the taught history was to be national, traditionalist, ethnic, linguistic and genealogical. The controversy surrounding a teachable version, representing the collective memory, was accompanied by policies tending towards preservation and cataloguing of archived heritage, as well as the dissemination of social theories of national scope. It was up to the liberal regimes to establish a nationalistic historical and patriotic version, and through instruction to make it a joint vision, geared

<sup>29</sup> Gardiner, *Teorias da História*, cit., p. 43.

<sup>30</sup> *Ibid.*, p. 47.

<sup>31</sup> A. Tocqueville, *De la Démocratie en Amérique. Les Grands Thèmes*, Paris, Gallimard, 1968, p. 23.

<sup>32</sup> *Ibid.*, p. 29.



towards social regeneration. In the positivist framework, history was used to aid the understanding and justification of the present. Comte (1798-1857) systematised the regulatory principles of the historical evolution:

The natural march of civilisation determines [...] for each epoch, without a shadow of doubt, the perfecting of the social status, both in its constituent aspects and as a whole. Only the former can be undertaken, and necessarily undertaken, with the aid of combinations made by philosophers and by men of State, or despite these combinations. [...] All men who exercise a real and lasting action on humankind [...] discovered, in each epoch, what changes had to be carried out, depending on the state of civilisation, and proclaimed them, proposing the doctrines or the corresponding institutions to their contemporaries<sup>33</sup>.

This present had become crucial for understanding and historiographic heuristics. History, as a social science, was converted into genealogy, causality and legitimisation of the transformations and the protagonists. As actors of the historical evolution, the protagonists saw their expectations and predictions facilitated and confirmed.

Likewise, for historical Materialism the transformation of the present derived from ordering an anticipated future, thus consecrating the principle that

the manner of production of material life determines the general character of the social, political and spiritual life. It is not man's conscience that determines their existence. It is their social existence that determines their conscience. [...] The proletariat, the lowest level of today's society, cannot emerge and lift itself up until the whole structure of the layers that form the official society goes up in smoke<sup>34</sup>.

The republican regimes, focused on the forming of the citizen, took up the formation of the citizen again, conciliated erudite history with philosophical history and brought the taught history closer to the present history. Giving emphasis to the complexity of the present and giving science history precedence over memory-history, regressive method was often recommended in the teaching of history. Therefore, the teaching of history began a new cycle. Erudite history was the condition of truth, but was difficult to apply to the teaching. Philosophical, interpretative and synthetic history was favoured over teaching, but given the intellectual demands, it was difficult to adapt it to the students' capacity<sup>35</sup>.

Focussing on the present, such as understanding and experience, would favour heuristics, the induction of the past, but the challenge of the new pedagogical movements was geared towards intuitive teaching and the application of active methods. The written source and the archive, requisitioned by the positivist historiography and the erudite, contradicted, in terms of didactics,

<sup>33</sup> Gardiner, *Teorias da História*, cit., p. 101.

<sup>34</sup> *Ibid.*, pp. 162-168.

<sup>35</sup> Furet, *A Oficina da História*, cit., pp. 109-135.

the ethnographical recreations and the historical-pedagogical museums. The formation of the citizen required experience centred on the national reality, but the humanitarian vision challenged a civilisational perspective.

*The lesson of history – history and educational argument*

In his analyses on German historiography, Koselleck showed that the modern concept of history that emerged in Germany in the first decades of the second half of the eighteenth century conciliated examples and repetition, in contrast to History in the singular, open to the event which abandoned the notion of example. The French Revolution was also a tension between revolution and reaction<sup>36</sup> and between the experience of individuals and the horizon of expectation<sup>37</sup>. The historiographic discourse reinitiated the form of process, with an organised layout detailing the evolution of subjects, witnesses, argument and evolutionary meaning. Genealogy and chronology became the back-ups of narrative history. In the background of the enlightenment, science and consciousness integrated into the same act of thinking. History made this alliance possible and fed it. Rousseau in *Droit de la Guerre et de la Paix* looked to history for examples and a critical perspective that would regenerate the political systems. His book makes frequent references to Sparta, the Roman Republic, the Geneva Republic, the history of Poland. And in *Émile* he reiterated the education role of history:

Pour connoître les hommes, il faut les voir agir. Dans le monde on les entend parler; ils montrent leurs discours et cachent leurs actions; mais dans l'histoire elles sont dévoilées, et on les juge sur les faits. Leurs propos mêmes aident à les apprécier. Car comparant ce qu'ils font à ce qu'ils disent, on voit à la fois ce qu'ils sont et ce qu'ils veulent paroître; plus ils se déguisent, mieux on les connoît<sup>38</sup>.

Rousseau had reservations about valuing the historical as a model, which did not favour the direct incorporation of the historical models into pedagogy, even those through which humanity is instructed and abides by. However, in his comments and political theories, he introduced the forecasting component and celebrated:

à tourner les yeux sur ces venerables images de l'antiquité où je vois les h[ommes] élevés par de sublimes institutions au plus haut degré de grandeur et de vertu où puisse atteindre la sagesse humaine [...]. Si l'histoire a rarement le même avantage [de la poésie] elle en tire en revanche un plus grand effet et quand à l'image de la sagesse heureuse se joint le sacré

<sup>36</sup> R. Koselleck, *Le Futur Passé. Contribution à la Sémantique des Temps Historiques*, Paris, École des Hautes Études en Sciences Sociales, 1990, pp. 31-35.

<sup>37</sup> F. Hartog, *Régimes d'Historicité. Présentisme et Expériences du Temps*, Paris, Éditions du Seuil, 2003, p. 85.

<sup>38</sup> Rousseau, *Émile ou de l'Éducation*, cit., p. 362.

caractère de la vérité elle apprend aux hommes à respecter les décrets de la providence et donne aux cœurs droits et sensibles un nouveau courage à bien faire. L'histoire peut suppléer encore à ce qui manque à ses récits pour l'instruction des lecteurs en réunissant sous un même aspect les faits et les héros propres à s'éclairer mutuellement<sup>39</sup>.

History supplied the dimension, nature and progression of the natural, the social and the human. Having intensely experienced the convulsions of the French Revolution, the Marquis of Condorcet, given the instability and the diversity of political and economic solutions and the vulnerability of the social, left a historical summary of the evolution of the human spirit to posterity – *Esquisse d'un Tableau Historique des Progrès de l'Esprit Humain*. The analysis of the human past enabled the understanding of the present and guidance for the future. It was this field and this place of human confluence that Kant translated into the desire for a «total political unification of the human species»<sup>40</sup>.

The eighteenth century witnessed the first systematic collections of historical and literary documentation and the compilation of national and society public libraries. History was a means and method for the intelligibility of individual memory and collective memory, for the comprehension and participation in human, civic, cultural, social, national action. The teaching of history ensured sociability and was a condition of national citizenship.

Collecting and documenting tradition and transforming it into a school curriculum, the Nation State schooled education and made instruction a constituting element of the Nation and instigator of a technology of the social. Making the Nation a State, unifying the civic and legal communication and standardising the school were the main movements of linguistic unification. The historical and linguistic tradition was the object of compilation and a policy of standardisation. The construction of history as a scientific narrative presented under the method of a legitimate discourse and supplied as information and the *episteme* of the modern man was assumed to be the essential basis of school culture. The history/ written culture binomial was extended to the discursive production and the school education as a whole.

With the crisis of the First Modernity, history became the basis of educational reason. The eighteenth-century intellectuals were also responsible for the first history of education treaties. Involved in dismembering the Scholastic, in the reform of the Lower Studies and University, as happened in the Portuguese case, in the formation of the Nation States, the eighteenth-century intellectuals, in contrasting tradition and change and drawing up plans for the progress of humanity, societies and individuals, wrote the first history of education treaties.

Involved in dismembering Scholastics, in reforming the Lower Studies and University, as happened in Portugal, and the formation of the Nation-States, the 18<sup>th</sup> century Intellectuals, contrasting tradition and change and summarising

<sup>39</sup> *Ibid.*, pp. 360-361.

<sup>40</sup> E. Kant, *Opuscules sur l'Histoire*, Paris, Flammarion, 1990, p. 83.

evolution, drew up plans for the progress of humanity, societies and individuals. They wrote the first treaties of history of education. Education began to be distinguished in comparison to other facets of historical development, playing a role in the progress of society and of individuals, as shown in the works of Locke, Vico, Montesquieu (1689-1755), Rousseau, Condorcet and Rousseau. The reformers, among which was Ribeiro Sanches, a Portuguese doctor and philosopher, known to most of the European Courts and Academies of the time and an advisor of Pombal, and the philosophers, among which Kant, argued for the schooling of education. Politicians and men of action, such as Condorcet, revisited history by isolating the evolution of the Human Spirit and endowing it with hope and regeneration of the future, creating school projects, with integrated and evolutionary, humanistic, scientific and technical programmes.

The historical incursions of intellectuals and philosophers, among which were Montesquieu, Rousseau and Kant, tempered the pedagogical intuition of Pestalozzi who was sceptical as regards the possibility and convenience of schooling basic education. Fostered and guided by history, education, as a factor of moralisation and citizenship, conciliated the past, present and future. Education was the historiographic object and the teaching of history was an educational lesson. Gabriel Compayré (1843-1913) proclaimed so in peremptory fashion in the preface of *Histoire Critique des Doctrines de l'Education en France depuis le XVIe Siècle* (1879):

Le but de ce livre est d'exposer le mouvement et le progrès de la pédagogie française, depuis les brillants initiateurs du XVIe siècle jusqu'aux réformateurs contemporaine. [...] Il y a quelque utilité à examiner l'histoire des systèmes, pour y chercher les vérités durables et y recueillir les éléments d'une théorie définitive<sup>41</sup>.

Compayré introduced the history of education as a matter for teaching education. Into the curriculum for teaching education the history of education, constituted by biographies, ideas, programmes, institutional narratives, assumed the function of information, laboratory and modelling.

Within the scope of the New School, the distinction between chronology-history and philosophy-history was reifying an active pedagogy centred on the learner and geared towards the training of the citizen. At the start of the 20<sup>th</sup> century, John Dewey proposed pedagogy to historicize the school experience as a condition of citizenship and Benedetto Croce admitted that the centrality of the present was a road to historical conscience. Upon publishing *Breve Interpretação da História de Portugal*, in 1929, António Sérgio (1883-1969), who fostered a controversy with the partisans regarding the emphasis given to chronological-history in secondary education, warned the reader that he had

<sup>41</sup> N. Charbonnel, *Pour une Critique de la Raison Éducative*, Berne-Francfort-New York-Paris, Peter Lang, 1988, p. 129.

drawn up an «interpretation of the history of our country»<sup>42</sup>. In line with this interpretation, he presented the reader with the theory-idea that the Portuguese formation and expansion were part of the same phenomenon «that reached its fullness in today's times»<sup>43</sup>. It is, he reiterated, the Discoveries that characterise the Portuguese as a truly historical people. And he goes on to say: «if one does not lose sight of this basic idea, and if this book is carefully read, perhaps it will help us to understand the past – and thereabouts (which is the most important thing) and nurture spirits that can construct the Future»<sup>44</sup>.

Hence, one can conclude within the framework of a reconstruction and interpretation of historiography of the transversal and the singular, open to humanity, centred on the human and geared towards education of the citizen, from the perspective of the present as experience and articulation between the past and future. Recovering the motivations and perspectives of the crises of the first Modernity, the search for an approach to history education geared towards the present has favoured the emergence of history as educational argument. Also we could compare and illustrate an approximation into History Education and the History of Education.

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<sup>42</sup> A. Sérgio, *Breve Interpretação da História de Portugal*, Lisboa, Livraria Sá da Costa, 1985.

<sup>43</sup> *Ibid.*, p. 1.

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# Bilingual education and language-of-education policy in Hungary in the 20<sup>th</sup> Century (1918-2008)

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**ABSTRACT:** Hungarian bilingual education is the first Central-Eastern European bilingual educational innovation following the Bulgarian model. In the present study the educational and language policy antecedents and circumstances of its introduction are to be presented. In order to understand the entire process, milestones in Hungarian educational history are to be discussed, among them, the language policy decisions directed at making Russian compulsory, which restricted the opportunities to learn other languages. As a result of this, the «hunger» of the society to learn other foreign languages continuously increased, and it was to be eased in a unique way by the introduction of bilingual education. The beginning of the project coincided with the period of the 1989-1990 political, social and economic transition; therefore it reveals how political opening and closing occurred in this social subsystem. It is also an emphatic objective of the paper to describe the three crises which the developers of the bilingual school network had to face: (1) steps forward and back in language-of-education policy; (2) prestige vs. capacity of central development, (3) the application of the language-of-education policy, the first year.

**EET/TEE KEYWORDS:** Bilingual education in Eastern-Europe; Learning of Russian and other languages; Language of education history; Language of education policy; First and second World War.

## *Language-of-education policy*

Language-of-education policy is a branch of language-policy, where the language-of-education aspects of language are emphasized. In other words, when not simply language-teaching, but the teaching of other subjects takes place in a given language. This is different in character from cases when there are topics occurring in language teaching, since those topics are the bases for

language-focused teaching, and here, we can talk about topic-focused teaching with the language as the foundation. Although in both cases, we strengthen the functioning area of the language, in the latter one, the objective is the cultural expansion of knowledge and the access to culture preserved in the language. Therefore, the decision on the language-of-education is more than a decision over a language to learn. This is why language-of-education policy is not simply a terminological twist, which examines language policy in relation to language of education, but a unique approach of investigation and analysis, a branch of language-education policy, which describes the theory and practice implied by the language of education. Even though different countries have different language policies, there are some common traits, which make language policy a distinct discipline of social science. Language policy deals with the encounters of language and the state, more precisely, the way the state uses language as both an individual and a social «asset». Its primary research areas are access to given languages (language rights), circle and range of learnable languages (language education), rights in connection with majority/minority languages (minority policy), and the objectives and functions in relation to language(s) (language planning).

As language within language education can be defined as the language of education, similarly we can define language-of-education policy within the framework of language-education policy. Cooper<sup>1</sup> extends the scope of language planning to acquisition planning, emphasizing its historical roots, which involve the concepts of language-development and language regulation. There are differences between the two branches of language planning, that is, corpus and status planning, and this is further complicated by the fact that the latter one also assigns functions of language use to a given language. But does language-of-education policy actually exist? Can we state that language-of-education policy is the meeting point of language planning and language policy? In other words, why has it been, and why would it be a monopoly of the state to make decisions about the languages of education, if it were not for their crucial importance? The idea that the issues of the language of education belong to language planning was put forward by Gorman in the 1970s, when he assigned language to this function, besides concepts, such as the language of mass communication and official language. Joshua Fishman<sup>2</sup> also interprets status planning in a similar way when he describes how Hebrew language was defined as the language of education in Israel, as does Alexander Neville<sup>3</sup> related to the «anglicization policy» in South Africa in 1910 as a language policy of

<sup>1</sup> R.L. Cooper, *Language Planning and Social Change*, Cambridge-New York-Port Chester-Melbourne, Cambridge University Press, 1989, pp. 29-46.

<sup>2</sup> J. Fishmann, *Language and Ethnicity*, Amsterdam & Philadelphia, J. Benjamins Pub. Co., 1991.

<sup>3</sup> A. Neville, *Language education polity, national and sub-national identities in south Africa*, Reference Study, Council of Europe-Conseil de l'Europe, 2003.



the conquerors. The Council of Europe offers a lot of Reference Reports and National Language Education Policy Profiles with the aim of understanding the relation between education policy and language education policy or language planning.

In the following, the history of bilingual education in Hungary is to be presented from the end of World War I to the 1980s partly, because its enforcement still has an impact on Hungarian public education, and partly, because the period draws international attention as well. When dealing with the issue, we cannot neglect to refer to two influential historical periods in Hungary and within these, the analysis of the public education restricted to the Russian language in the period of 1945-1989, and the description of the birth of language education policy after the abolishment of compulsory Russian language.

*Language-policy climate and the process of establishing bilingual schools between the two World Wars in Hungary*

*English, French, German and Italian language of education for the social elite*

At the beginning of the 20<sup>th</sup> century, also among religious schools, but more in accordance with the foreign policy objectives of the state, a loose network of schools was formed in Sárospatak, Gödöllő, Pannonhalma and Budapest. In these institutions, in addition to Hungarian, English, French, Italian, or German languages were selected for educational purposes, as these were considered to be most appropriate for the directions of international political communication.

After the First World War, in Hungary, which lost 2/3 of its territories, cultural and educational policies were subordinated to the foreign policy interests of the state. In education, besides many other measures bringing outstanding achievements, the education of foreign languages was given more attention than ever before, and it was uniquely adjusted to education in patriotic spirit. After the First World War, the view was generally accepted that Austrian diplomacy overshadowed our self-reliance; the guardianship dulled our foreign political senses, and set our vision to a one-sided German orientation<sup>4</sup>. The independent Hungarian state found it necessary to possess mental capacity and do meticulous work, in order to acquire planned and organized international relations. The emergence of new Hungarian-foreign schools at the beginning of the 20<sup>th</sup> century formed an integrated unit with other elements of the charismatic Klebelsberg<sup>5</sup> conception of cultural politics, with linguistics departments at

<sup>4</sup> G. Kornis, *Gr. Klebelsberg Kuno*, Budapest, Királyi Egyetemi Nyomda, 1932, p. 5.

<sup>5</sup> Kuno Klebelsberg was Minister of Religion and Public Education from 1922 to 1931.

universities, foreign scholarships, the development of scientific research and the establishment of the Collegium Hungaricum network. The objective of foreign language schools was to educate cultivated women as future mothers who can speak foreign languages and are loyal to the nation, and a cultivated male-elite who can serve the interest of the state, in accordance with the dominant domestic and foreign political directions. In this spirit, an English branch in Sárospatak, in the Calvinist boarding-school (1931)<sup>6</sup>, a German and a French girls' lyceum in Budapest by the Redemptorist sisters (1931)<sup>7</sup>, a French branch in Gödöllő by the Order of Premontré (1938)<sup>8</sup>, and an Italian one in Pannonhalma by the Benedictine Order (1939)<sup>9</sup> were established. Between the two world wars, we can find sources in 23 institutions proving the existence of foreign languages of education in addition to Hungarian. The division of subjects and languages of education was not regulated. There were schools where one subject, and there were some where almost all subjects were taught in a foreign language. This is the period of declared language-of-education policy, and spontaneous language-of-education pedagogy.

### *Bulgarian language of education for refugees in the 2<sup>nd</sup> World War*

The situation fundamentally changed during World War II, especially at the time when the front reached the country. Politics started to abandon schools, and was replaced by humanity: refugees were welcomed, escaped soldiers were harbored, the wounded were healed. After the invasion of Poland, tens of thousands of people left their homes, and from them, approximately 35000 arrived in Hungary. In the refugee camp set up at Balatonboglár, from 1939, the only Polish Grammar School in Europe was functioning, with the support of the local parson and the government committee for refugees<sup>10</sup>.

<sup>6</sup> *Report of the Calvinist College and Theological Academy of Sárospatak the 1932/1933 academic year*, s.e., 1933, p. 5.

<sup>7</sup> *Report of the teacher-training, secondary-level language-lyceum and elementary school functioning in the Budapest St. Margaret Educational Institution of the Redemptorist sisters on the 1932/1933 academic year*, s.e., 1933, p. 8.

<sup>8</sup> *Report of the French Grammar School of the Premontré order in Gödöllő on the 1939/1940 academic year*, s.e., 1940, p. 21.

<sup>9</sup> *Report of the Pannonhalma Grammar School of the Benedict Order on the 1939/1940 academic year*, s.e., 1940, p. 19; T. Pelles, *A magyar-olasz két tanítási nyelvű oktatás*, Pécs, Pécsi Tudományegyetem. 2006, p. 98.

<sup>10</sup> G. Haas, *A menekültek patrónusa*, Varga Béla, «Vigilia», n. 3, 1993, pp. 3-8.

*Language-policy climate and process of establishing of bilingual schools after the 2<sup>nd</sup> World War*

*Russian language of education*

After the 2<sup>nd</sup> World War Hungary belonged to the Soviet sphere of influence. After 1945, the establishment of Soviet-oriented politics soon began. In public education, first the introduction of the 8-year primary school, then from 1947, the nationalization of clerical schools, and the cutting of western ties were enforced<sup>11</sup>. From 1949, Russian became the compulsory language to be taught in schools. Although the church regained the secondary schools of Sárospatak and Pannonhalma in 1950, the German-French school of the Redemptorist sisters went on to become a state secondary school (Margit Kaffka Secondary School). The German boarding school of the Institute of the Blessed Virgin, the French institute of Notre Dame de Sion sisters, and the French school of the Order of Premontré in Gödöllő all ceased to exist with the measures of nationalization<sup>12</sup>.

*Gorkij School (1945-1956)*

In 1945, at the Soviet embassy, a school was established for the children of Soviet soldiers and politicians stationing in Hungary, with the 10-class structure applied in the Soviet Union<sup>13</sup>. For its functioning, the evacuated Andrassy palace in the center of Budapest was made available. From 1947, the children of communist immigrants repatriating from the Soviet Union, immigrants expelled from Yugoslavia, and Greek and Korean refugees could also be enrolled in the school. The mother-tongue composition of the students was rather diverse, at the beginning, most of them spoke no, or little Hungarian. So the language of education remained Russian.

Between 1950 and 1956, the school was transferred to the authority of the Hungarian government, and took up the name *Maxim Gorkij Hungarian-Russian School*<sup>14</sup>. As a means of legalization, it was also made available for Hungarian students, but although others were also recruited, mainly children of the political elite enrolled. This time, Hungarian grammar, literature, and history were also taught. With the 1956 revolution, the general opposition

<sup>11</sup> G. Diener, *A Francia Intézet Magyarországon 1947-1989*, Magvető Kiadó, Paris, L'Harmattan, 1990.

<sup>12</sup> The school was opened again after the 1989-1990 transition.

<sup>13</sup> *Sihedernyi koromban*. About the school a documentary film was made in 2000, directed by Zsigmond Papp Gábor, photography by Sándor Csukás.

<sup>14</sup> Based on resolution XV. of the HWP (Hungarian Workers' Party).

to the Soviet rule strengthened. Rejecting the compulsory learning of Russian became the symbol of independence. The obligation to learn Russian in schools was lifted and the Russian-language Gorkij School, which was considered to be an outsider, Soviet-system element of public education was also closed.

### *Sándor Körösi Csoma Grammar School (1974-)*

After the defeat of the 1956 revolution and war of independence, in the second half of the 1960s, the situation started to thaw and the classical Kádár-system consolidated. The educational policy of the years between 1956 and 1989 can be characterized as a «GO and STOP» system. New and new curricula were issued, and as a result, public education started to «move», and then stopped until the next measure was enforced. This motion created the illusion of development, in spite of the fact that, for example, if we take a glance at a single segment of public education, no significant change occurred in language policy. Its main element was the reintroduced compulsory education of the Russian language. Although it was possible to learn Italian, French, German and English in specialized classes, their ratio was low. In the background of this phenomenon, the so-called restrictive language policy can be identified. In the seventies, tourism<sup>15</sup> started to emerge at a modest level, and international relations intensified. Towards the end of the decade, the expression of «language-demanding job» was born, which underlined that there were some professions which could not be done without other foreign language competence than Russian, but it was only the '80s, when it «turned out» that foreign language competence might not only be demanded from employees in the tourism sector, and only in the '90s when it became clear that in fact any kind of work can require languages.

It is a unique feature of a dictatorship that in the political elbow-room, authorities constantly strive for repositioning themselves: they plan, prepare, decide and execute. In this process they become so exhausted that after this, the institution is abandoned with its functional problems. In the 1970s, the time seemed to be right to establish a school teaching in Hungarian and Russian languages. Its foundation was supported by the Ministry of Culture; the District Council of the 3<sup>rd</sup> district was appointed as maintainer, and the Budapest Pedagogical Institute was appointed as supervisor by the City Council of Budapest. The oldest document on the decision to establish the school is §4 of the Government Act 35/1971 XI.3, which was followed by an agreement at the 8<sup>th</sup> Budapest meeting of the Hungarian-Soviet Intergovernmental Committee of

<sup>15</sup> In three years it was allowed to travel to Western Europe once. Foreign currencies could not be kept for private purposes, so if somebody got a permit to travel, the state allocated 50 USD.

Cultural Cooperation (1972): *Today there is a demand on the side of the society for establishing a Russian-language secondary school*<sup>16</sup>. The establishment of the school was ratified at the meeting of the Agitation and Propaganda Committee of the Hungarian Socialist Workers' Party<sup>17</sup>. After this, the selection process of the school, and the elaboration of conditions began. The ratio of Russian language of education was on average 16%, foreign languages and teaching in foreign languages composed 40% altogether. Its distribution in the 4 grades of the school was 0%, 27%, 15% and 22%. In the selection of foreign-language subjects, the main factors were the continuation of studies in the Soviet Union, and the subjects of the entrance exam: Physics, Chemistry, Biology, and World History in the year before the school-leaving exam.

Besides the series of high-level decisions and negotiations, it was neglected that legally the maintainer and the school should have asked for permission to apply the «non-Hungarian» language of education, and the executive body should have issued the permit afterwards, and not vice versa, as it actually happened. Additionally, enrollment targeted a small circle, only few students (60 for year) were accepted. This school, which was for a long time the only bilingual one, did not have a major impact on public education. Nevertheless, it was the first time when a school had been founded on the basis of a declared language-policy decision supported by arguments, to which language-of-education pedagogical aspects were also attached. The school experience of the following 10 years was also helpful to the other bilingual schools founded in the 1980s.

### *Language-of-education policy background of the new bilingual grammar-school development projects*

#### *The compulsory Russian language*

After the 2<sup>nd</sup> World War, learning Russian was made compulsory in the upper grades of the primary school and in secondary schools in the order n. 1200-A-7/1949/V.K.M., and soon the curriculum was issued as well<sup>18</sup>. From the same year, teaching modern languages also lost ground, and outgoing classes having learnt in the old language education system were replaced with the enrolling classes learning Russian. It is a common fact that personal conditions of

<sup>16</sup> A proposal of the Ministry of Culture for the Agitation and Propaganda Committee of the HSWP CC (Hungarian Socialist Workers' Party Central Committee, 22 December, 1972).

<sup>17</sup> A meeting of the Agitation and Propaganda Committee working by the Central Committee of Hungarian Socialist Workers' Party on 12 February, 1973.

<sup>18</sup> Order n. 1220-10-1950.V.K.M.

teaching Russian were not present, Russian teachers were «one lesson ahead of the students» in learning the language. An approximately 4% of primary school students could learn another language, and a similar ratio of vocational school students could do the same. Two foreign languages were taught in grammar schools, from which the first one was always Russian. The lack of motivation to learn the language, the over-politicization of Russian, the low number of weekly lessons, and several other things resulted that a considerable number of generations left school with knowing only a few sentences in Russian. Therefore, especially in the 1980s, first, professional and later, hidden political attacks were directed against the Russian language, attempts to abolish its compulsory status. The Ministry of Culture tried to figure out the room for maneuver with some proposals, which were also backed by professional background-institutions and organizations as well.

### *The abolishment of the compulsory status*

In 1989, the year of the social-political transformation, the educational authority, perhaps for quick publication, first issued only an announcement in the 12<sup>th</sup> issue of the Cultural Bulletin, and delegated the decision on foreign languages to be learnt to the schools<sup>19</sup>. With this, the obligation to learn Russian ceased. In the following few years, the number of learners decreased rapidly, and Russian became one of the «scarcely taught languages». Not only did the ratio of educated languages transform, but there was a conceptual renewal as well, especially in vocational training. Managing the turn in language education was not easy, new development projects were supported with a constantly reformed tender system (Pic. 1 and Pic. 2).

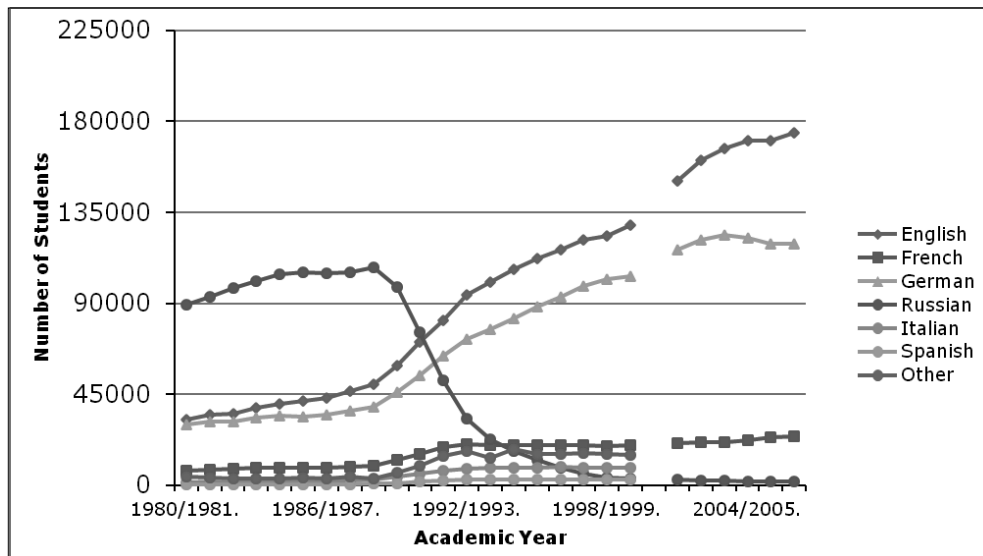
### *Language-policy climate and process of establishing of bilingual schools in the time (1989) of political transition in Hungary*

#### *The development conception, development project*

Not long after launching the previously mentioned *Sándor Kőrösi Csoma Russian-Hungarian Bilingual Grammar School*, in 1979, the Science Political Committee of the Central Committee of Hungarian Socialist Workers Party (HSWP CC) held a meeting, where they accepted the program of teaching and learning foreign languages and delegated the execution in Resolution no.

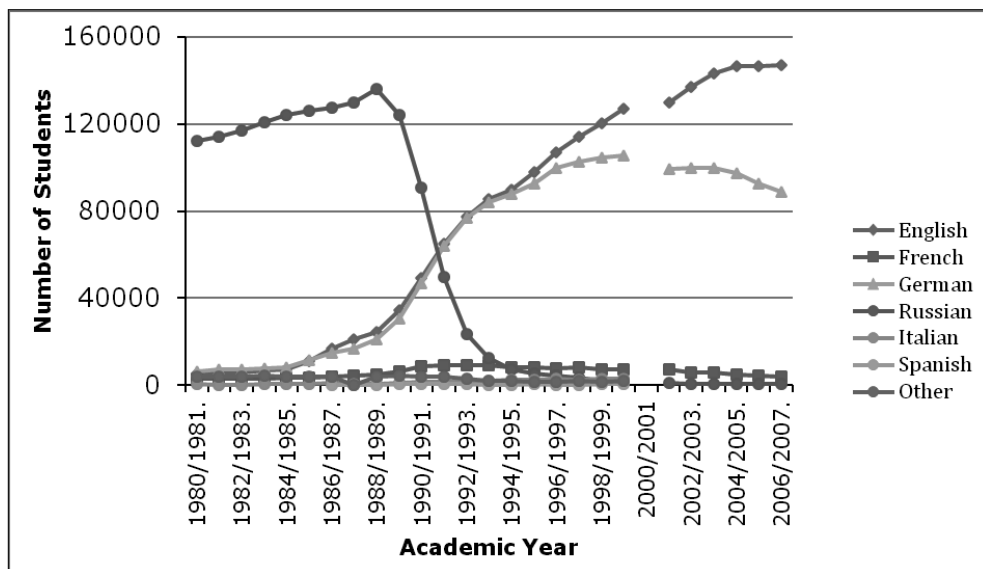
<sup>19</sup> «Cultural Bulletin», n. 12, 1989, p. 906 (41545/89).

Pic. 1. Number of foreign language learners in grammar schools (ISCED 2+3) by languages between academic years 1980/1981 and 2006/2007.



Source: Ministry of Education statistics

Pic. 2. Number of foreign language learners in vocational secondary schools (ISCED 3) by languages between academic years 1980/1981 and 2006/2007.



Source: Ministry of Education statistics

30010/1979 SPC to the Ministry of Education. The first article of the resolution mentioned the opening to «western languages» (French, English, German, Italian) omitted references to political concerns, and referred to Russian as «one of the languages». The expression of internationally widespread languages was also introduced in the discourse, and it was indicated that they did not oppose the idea of increasing the number of foreign-language secondary schools. After an approximately five-year break, on 28 February, 1984, the leaders of the Ministry of Education and the Ministry of Foreign Trade held a common meeting where the plan was revitalized and a suggestion was made for founding foreign-language secondary schools. The minister at that time was Béla Köpeczi, the erudite academic since permitting the grammar school «project» was not evident. «We would like to ask for confirmation if comrade Köpeczi agrees with the contents of records no. 735/1984<sup>20</sup>, and if he has made the decision in principle» was the question. The idea of the foundation of bilingual high schools was also stimulated by the proposal titled *The situation of teaching foreign languages in schools and tasks for development* was put on the agenda of a Ministerial Council of state, and afterwards, it was also put forward at a meeting of the Cultural Political Work-Committee, and at a meeting of the Agitation and Propaganda Committee of the Hungarian Socialist Workers Party as well. This provided an occasion for a ministerial-level political decision on the development. It seemed that the circumstances were favorable for its realization. The plan was attractive enough, new, and with a proving point for the state to turn to a direction to satisfy the hunger for language-competence on the part of society.

The development conception was prepared in 1984. This version was a transcript of the Bulgarian model, in a way that it combined a language preparatory year + four «normal» school years, and it was also similar in the respect that here it was also organized in grammar schools leading to higher education. In other questions and in its pedagogical foundations it was significantly different. After 1984, the following conceptual foundations were stabilized:

Introducing a language preparatory year

- Objective: to give a new opportunity for primary school finishers to acquire a foreign language at a high level.
- Reason: to balance the selection prevailing in primary schools owing to specialized classes, and to incorporate an intensive number of lessons, teaching in small groups, and a native teacher in language learning.

Five foreign-language subjects through the entire length of studies

- Objective: to complete language competence in various, but prestigious contents in education, and continuously ensure the required language input.

<sup>20</sup> The memorandum did not refer to the question «How could the number of foreign-language secondary schools be increased?», nor did it refer to previous professional-political directions.



- Reason: the focus of learning to be placed on learning content instead of learning language. It is also a reason that the weekly number of lessons cannot be increased, thus a higher number of language lessons cannot be reached extensively.

Six foreign languages as target languages according to social demands

- Objective: in addition to Russian, western languages to be placed in the center of learning.
- Reason: the compulsory learning of Russian hinders obtaining the so-called western languages, while in society there is “language-hunger”. To strengthen language education within public education, so that students are not squeezed out to the market of private language schools if they want to learn western languages.

Locating realization in small grammar schools in a peripheral condition, where pedagogical and working conditions are adequate or can be produced.

- Objective: to ameliorate the general performance of public education.
- Reason: to ease the pressure of the demographic wave reaching secondary school level.

Nationwide tender for launching bilingual programs in 10 schools, for six target languages.

- Objective: to ensure equal opportunities in the tender and to stimulate local resources.
- Reason: re-evaluation of social actors, the process of detaching professional decision-making from the center.

The conception also drafted the resource-sharing side of the development, the principles of school allocation, and planned a long-term longitudinal research project as well<sup>21</sup>.

Between 1984 and 1986 the elaboration of the conception of the curriculum and the educational program, the establishment of the financial and legal conditions of functioning, and the international contracts were concluded. The latter one ensured the recruitment of foreign teachers, the opportunities for students to travel, and the training scholarships for teachers. A call for tenders was issued among schools and maintainers, and the selection of the most suitable candidate institutions took place. Meanwhile, books had to be translated; the curricula and supplementary materials had to be prepared. As a reminder: the period between 1984 and 1989 is the last five years before the political transition in Hungary. The bilingual development project showed the symptoms of several crises of language-of-education policy.

<sup>21</sup> *Memorandum* of the ministerial meeting on 26 November, 1984; Notice to the leader of the Ministerial Secretariat 735/84 P.B. attached to the file no. 919/1984. I. (July 6, 1984); Report on establishing the further education program. Private archives of Ágnes Vámos.

### *Tree crises of language-of-education policy*

#### *First crisis: steps forward and back in language-of-education policy*

##### *The foreign-language subjects*

In accordance with the political-ideological relations of the era, in the central development, there was a simultaneous working of an old and a new language-of-education policy. In its principles and its realization, besides the numerous new elements, the old paradigm (and the effectual regulations) also lived on; the ministry defined the foreign languages and the circle of foreign-language subjects. At the selection of the subjects, the ratio of natural and social sciences, and the more prestigious higher educational directions (law, economics) were included; this is how History, Geography, Biology, Physics and Mathematics were given foreign-language status. In 1986, however, operations were to meet an unexpected obstacle. Based on previously unclarified antecedents, the foreign-language status of History was revoked and that of Geography was suspended by the deputy minister responsible for public education.

In accordance with the discussion held at comrade Ferenc Gázsó, deputy minister on 12<sup>th</sup> of current month, we are not going to translate History books for the bilingual schools, and we terminate the contracts concluded. [...] The case of Geography is to be decided until the end of July, because the NPI [National Pedagogical Institute] is going to investigate the revised manuscript, and will make its proposal until that date<sup>22</sup>.

As a compromise, the developers offered a bilingual solution for the subject. For this, they referred to former high-level central decisions as education-political antecedents, the professional concerns of the training, and the hasty manner of the suspension. The language-of-education policy decision to teach national contents in the mother tongue was made, because certain educational political circles considered the introduction of bilingual education too much of an opening. As a result of the bargain, only three from the five foreign-language subjects remained, and two ran on as bilingual subjects.

##### *Selecting the schools, professional concerns and political pressure*

Target languages also faced a crisis. While in 1984-85, launching Russian grammar schools seemed easy, whereas English, French, German and Spanish more difficult, with the progress of the project, the former became more

<sup>22</sup> File n. 1250/86 (Publishing Company of School-books). The National Pedagogical Institute is a background institution of the Ministry of Education, fulfilling professional tasks.

problematic. The assumption that it would be easy to launch the Hungarian-Russian school was supported by the inequality in personnel and in assets, the uncertainty of international contracts and, most probably, the confused judgement of the situation. In reality, however, first there was no Russian candidate among the applicants for bilingual education. In this situation, it seemed that if there is no Russian school, four English ones could not be launched, even though no interviewees articulated that there would have been any kind of political pressure for it. As no relevant sources have been found so far, it seems from today's perspective that the supposition that the bilingual school establishment would not «go through» if there were fewer Russian schools than schools for other target languages was only a preconception of the ministry. Nevertheless, the developers made a tactical «leap forward», and sacrificed three Russian school launchings hoping that this way 3-3 English, German and French, and 1-1 Spanish and Italian schools could be started. This way, the number of schools increased to 14. The necessary three Hungarian-Russian bilingual schools were finally launched by the ministerial «stimulation».

### *The second crisis: prestige vs. capacity of central development*

#### *Slowing the central development project*

As much as it was difficult to launch the three Hungarian-Russian bilingual high schools, so easy it became to start the other languages. After a certain point, starting bilingual classes became a matter of prestige, which was further fuelled by the remarkable social interest in the first year of enrolment. The grammar school department of the Ministry of Education considered the newer and newer applications for founding bilingual schools to be a threat for the success of the training and for quality work. In addition to the feeling of uncontrollability, a fear of the loss of balance in the financial resources also emerged. Since at this time, it was still in the position to authorize, the ministry took up a wait-and-see attitude, which provided a solution for some time. The applications arriving week by week were finally ran as local development projects from 1986-87, as for these no support had to be ensured, moreover, the resource-demanding language preparatory year was not permitted, either. Thus, parallel to the central development project, the establishment of the network of four-year bilingual grammar schools began. Several valuable new programs were elaborated, although they were not allowed to use the «bilingual» title.

*Mobilizing political and social capital*

In addition to the promising programs, however, others also appeared, in which the intention and the inside (outside) circle of support were stronger than the expectable conditions of functioning. The increased willingness to establish bilingual schools created tension within the ministry as well. The developers tried to boycott the programs lacking professional bases as much as it was possible. Although they were in charge of the realization of the program, this responsibility was (and could be) overwritten by their superiors, who preferred their own personal contacts, made background decisions and issued licenses<sup>23</sup>.

The problem emerged because the conditions were set for 10-14 schools and the circle of these, in accordance with the original conception, had already been formed. The preferential support of the training attracted newly interested schools to the bilingual circle, and many of them felt the opportunity of language liberalization in it. Teachers, supervisors and subject-managers willing to teach the so-called western languages wanted to gain a room for maneuver, and there were prestige battles between county, city and party leaders as well. They wanted English and German target languages, and high-profile schools. To accept the newly interested, based on the philosophy of the program, would only have been possible in case of new subsidiary resources, or if the existing resources had been redistributed. For the former, there was no chance at all, and the latter one would have meant breaking the promises and obligations provided to the previously selected schools. There were no extra funds available, and soon it was admitted as well<sup>24</sup>. To extend the so-called five-year bilingual program was not possible in reality; however, the plans of other schools and maintainers could not be stopped, either. These intentions could temporarily be redirected into the channel of four-year bilingual education, but with this, the original conception to empower well-functioning, pedagogically mature small-town schools facing enrolment problems was harmed. Restrictive language-of-education policy fell into its own trap, and lost the control of establishing schools.

<sup>23</sup> 22.933/86.IX. Petition to launch a bilingual grammar school class (end of 1996, then February, 1997), further files: III.1144/1986. Department of Culture, County Town Council; 1000/1986. Request for permission to open bilingual grammar school classes (18 July, 1986).

<sup>24</sup> 27/649/87.IX. Letter of the Minister of Culture to the First Secretary of the Bács-Kiskun County Committee of the HSWP (15 April, 1987); 23/982/86. IX. Permitting the so-called B-type grammar school class in the Lajos Tolnai Grammar School of Gyöngyös. (7 January, 1987); 27/842/87.IX. Proposal to launch bilingual grammar school classes (15 April, 1987).

*The third crisis: the application the language-of-education policy, the first year*

In accordance with the conception of the program of bilingual grammar schools, the entrance exam was set to ensure the principle of equal opportunities, which was also served by the language preparatory year, and the new opportunity available for everyone. This way, application to bilingual schools would have been independent of whether students, based on the social/political status of their families, had previously had the opportunity to learn in specialized classes for languages.

Advantages of bilingual learning were appreciated more than it had been expected, thus, already in the first year of enrollment the number of applying primary school students broke the record. The ratios are well-illustrated by the fact that in the first year of enrollment 2,950, and in the second one, 4,981 students applied to the 10 and then 14 schools, so there were about 300 people for a 30-student class. In this case, the Green-theory<sup>25</sup> seems to be in effect, according to which, small-section training and the expected great social benefits of enrollment attracts many people. The providers are stimulated to launch this kind of training (as there is demand for it), which results in an increased capacity, so the chances of applicants improve. However, if there are many people with a kind of competence, its value is to decrease. According to the Green-theory, expansion over a certain point leads to admitting that it is not the relative advantage which is important, but not acquiring the given competence (in our case: the knowledge of foreign-language subjects, and foreign-language professional competence) might be a disadvantage, so «staying out of it» might be a problem. This latter issue will be a question after the political and economic transition.

*The entrance procedures*

With the intensifying social interest, the interest of the state and party organizations grew as well, and this began to push the training to become one for the elites. This was also exemplified by the previously mentioned school founding in the centers. Before the entrance exam of 1987/1988, a great number of telephone calls and letters were sent to the organizers. By December and January, the atmosphere became almost hysterical. As the managers of the program wanted to keep equal opportunities for the students, a unique, previously unprecedented

<sup>25</sup> T.F. Green *et al.*, *Predicting the Behaviour of the Educational System*, Syracuse-New York, Syracuse University Press, 1980.

system of entrance exams was elaborated. It was a program in which the best performers would get accepted, and which would provide protection against using personal connections.

### *Stabilizing the original conception*

At the established new entrance exam, abilities, creativity and problem solving were examined, and the performance rankings were prepared with a central computer program. To preserve objectivity and performance – orientedness, organizers decided not to have an oral examination. This way, the chance of getting accepted into the bilingual schools became independent of the social/political status of the students' families, and of their previous foreign-language learning opportunities. Another novelty improving the chances was that with a single entrance exam, one student could apply to all bilingual schools, and based on the performance, they won acceptance to the given school. Approximately half of them opted for this multiple application. The exam also revealed the language preferences of this section of the society.

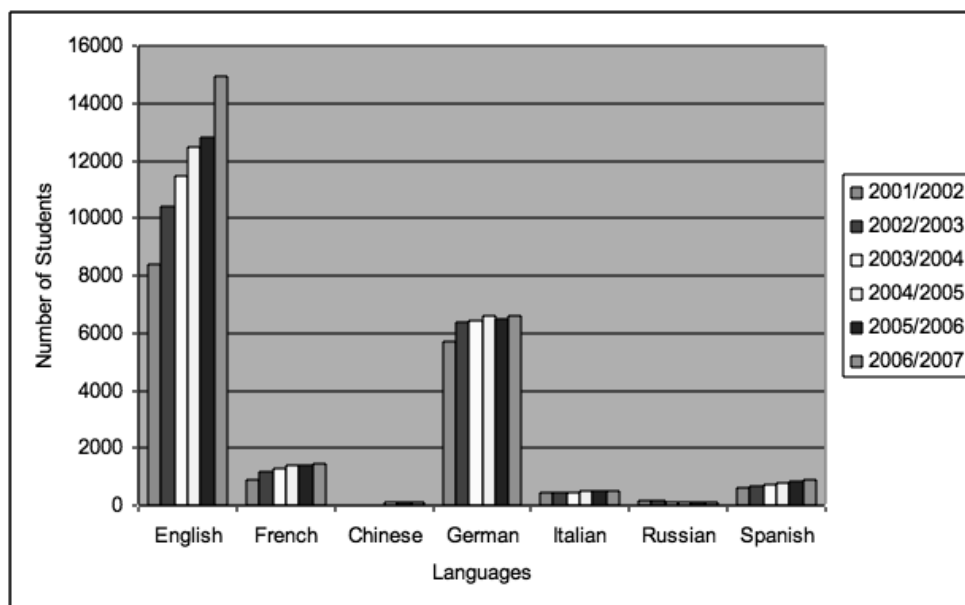
### *Bilingual education after the political and economic transition (1989-2008)*

With the relatively quickly undergoing transformations, everybody was obliged to redefine themselves and relocate in the new space and time. Bilingual schools and their developers were also in a similar situation. For a period, they were often attacked, and their achievements questioned. However, society, apart from the three Hungarian-Russian schools, did not abandon these institutions, what is more, an emphasized demand was articulated (Pic. 3).

In the following, an open and democratic language-of-education policy emerged which is hallmarked by the public education act (1993), the national core curriculum (1995), and the regulations for the school-leaving exams (1997). Bilingual schools receive a supplementary normative budget support, the basis of which is the order no. 26/1997 (VII.10) MKM on the orientations of bilingual school education. It was in effect up to the end of the period examined (2008) that it was allowed to teach foreign languages in all levels and all types of schools, and, apart from Hungarian Grammar and Literature, all subjects could be taught in foreign languages. For a financial support, at least three foreign-language subjects had to be ensured, and the ratio of the foreign language had to be at least 35%<sup>26</sup>. The effective realization of bilingual education was in the

<sup>26</sup> Á. Vámos, *The function of foreign language at the school-leaving examination and language*

Pic. 3. Number of foreign language learners in all bilingual schools (ISCED 1+2+3) between 2001/2002 and 2006/2007 – differentiated by languages.



Source: Ministry of Education statistics

scope of authority of the maintainer. This regulative framework, the level of services provided by the school and the interest of the society have resulted the continuous increase of bilingual schools.

### *Conclusion*

Bilingual education in some form and language has been continuously present in the history of Hungarian education. In certain ages, it is devoted special attention, which usually has a political background. The location and the opportunities of a language in public education are closely related with the attitudes to the given language and culture, and to the access of social groups to cultural values and assets. In this respect, it is an indicator of politics, cultural politics, educational policy and language policy. After the First World War, in

*pedagogy in bilingual education*, paper presented in *The 35<sup>th</sup> International Association for Educational Assessment (IAEA) Annual Conference* (Brisbane, 13-18 September 2009), pp. 1-10.

accordance with the foreign policy objectives of the state, a loose network of bilingual schools (English, German, Italian and French) was formed, as these were considered to be most appropriate for the directions of international political communication. After the 2<sup>nd</sup> World War Hungary belonged to the Soviet sphere of influence. From 1949, Russian became the compulsory language to be taught in schools. Between 1950 and 1956 the Maxim Gorkij Hungarian-Russian School was established for the children of Soviet soldiers and politicians stationing in Hungary. In the 1980s, first, professional and later, hidden political attacks were directed against the Russian language, attempts to abolish its compulsory status. In the second half of the decade new bilingual schools (English, German, French, Italian, Russian and Spanish) opened by the central development and with the common efforts of foreign partners. There were several initial challenges; the personal and objective conditions were uneven. Furthermore, the regime change was under way, and support was gradually taken away from the bilingual schools. From the 1990s on, the schools and teachers left alone started to initialize development by themselves; new bilingual schools, especially primary and vocational schools were established; however, they had to rely on themselves. The three crises and the ways that they were handled in the transitional period reflect how this political uncertainty, matched by public attention and demand resulted in the loss of the Ministry of Education's control over the establishment of new bilingual schools.



# The representation of childhood in the discourse on the rights of the child in the twentieth century

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**ABSTRACT:** In the framework of supranational policies, during the twentieth century we have witnessed the construction of a discourse on childhood, which has become universal and hegemonic. The aim of this article is to analyse how the approach to the rights of the child set a new paradigm for understanding childhood. To that end, the document corpus analysed is composed of the texts of international treaties, as well as reports by UNICEF and the General Comments by the Committee on the Rights of the Child. This substantive documentation allows us to observe the transformations, contradictions, continuities and ruptures in the discourse on childhood.

**EET/TEE KEYWORDS:** Childhood policies; Children's rights; Humanitarian organizations; XX Century.

## *Introduction*

Starting at the end of the nineteenth century and continuing up to the present day, Western countries have seen the emergence of a set of child protection policies. Moreover, within a supranational framework, a number of international treaties have been approved (Geneva Declaration, 1924; Declaration of the Rights of the Child, 1959; Convention on the Rights of the Child, 1989), in which the child has gone from being an object requiring protection to becoming a subject of rights. As this change is observed over time, we witness the process of constructing a particular representation of childhood. At the same time, UNICEF (created in 1946) and the Committee on the Rights of the Child (created in 1991), both of which are part of the United Nations system, have been building a view of children from the perspective of human rights.

The aim of this article is to analyse how the focus on human rights has led to a new paradigm of childhood. To that end, we analysed a document corpus composed of the texts of the three international treaties and a series of reports by UNICEF and the Committee on the Rights of the Child. This key documentation allows us to observe the transformations, contradictions, continuities and ruptures in the discourse on childhood from a supranational perspective. The continuing circulation of these discourses in the international community and in child protection policies is also important. The methodology used to analyse this document corpus is of a qualitative nature and based on discourse analysis. We have created certain categories of analysis based on a set of indicators that are commonly used in analysing the rights of the child.

The results yield a representation of childhood that does not coincide with the observed discourse and rhetoric on the rights of the child. It is clear that this representation is based more on the traditional line of assisting and protecting children, which arose at the beginning of the twentieth century, and less on the new view of children as subjects of rights, which was constructed in the 1990s. What this means is that aspects such as health, survival and the protection of those in vulnerable situations prevail in the earlier view of childhood, and that other rights, such as participation and civil rights, among others, enjoy a certain degree of relevance in the later view.

Moreover, the understanding that we have of boys and girls in the West is influenced by the social representation of childhood. That is, there is a strong thesis that fundamentally coincides with what Casas suggests, which is that «we members of the social category of adult have created subcategories of subjects in order to be able to continue arguing that there are beings that cannot be considered ‘equal’ to those who are ‘already adult’»<sup>1</sup>. Accordingly, over recent

<sup>1</sup> F. Casas, *Representaciones sociales que influyen en las políticas sociales de infancia y adolescencia en Europa*, «Revista Interuniversitaria de Pedagogía Social», vol. 17, 2010, p. 18; F. Casas, *Infancia: perspectivas psicosociales*, Barcelona, Paidós, 1998.

decades our view of childhood has been changing, moving from a logic that was resistant to change and characterised by ideas such as «children are in the process of being socialised», «children's issues», «children are not productive agents» or «values are learned in adulthood», to an alternative logic based on the idea that socialisation is bidirectional and «children have rights», «children have mastery of audiovisual technologies», «children have responsibilities and competences», «children contribute productively to their society» and «values are shared». Therefore, the social construction of childhood can only be explained from the historical contextualisation of these arguments that make up different representations of childhood constructed by adults.

Apart from ideological stances, the social representation of childhood, just as with other social representations, actually consists of «conditioning and influencing the practices, attitudes and behaviour of people and institutions»<sup>2</sup>. At the same time, within academic disciplines, studies on children have acquired increased importance. At a conference held in Paris in May 2013, a question that has yet to be settled was raised: *Which discipline do children belong to?*<sup>3</sup> This was not a rhetorical question, but rather it was to put issues regarding discipline boundaries between the various social sciences on the table, in order to clarify which field is the most relevant for studying children in their diversity, which we can call *Children's Studies*. It must be emphasized that in the process of constructing the meaning and category of children, the discourse of «psy-knowledge» has been a determining factor<sup>4</sup>.

### 1. Protection policies and the contemporary representation of childhood

In the recent historiography on childhood there are different ways of approaching how it is understood<sup>5</sup>. One is the study of child protection, where

<sup>2</sup> J. Sánchez, *Puerilizado y adulterado: representaciones institucionales de la infancia*, «Universitas, Revista de Ciencias sociales y humanas», vol. 13, 2010, p. 100.

<sup>3</sup> See: <<http://jediscenf2013.sciencesconf.org>> (last accessed: June 30<sup>th</sup>, 2014).

<sup>4</sup> V. Llobet, *La producción de la categoría «niño-sujeto-de-derecho» y el discurso psi en las políticas sociales en Argentina*, in V. Llobet (ed.), *Pensar la Infancia desde América Latina*, Buenos Aires, CLACSO, 2014, pp. 209-234.

<sup>5</sup> J.P. Bardet, J.N. Luc, I. Robin-Romero, C. Rollet (edd.), *Lorsque l'enfant grandit. Entre dépendance et autonomie*, Paris, Presses de l'Université de Paris-Sorbonne, 2003; E. Becchi, *I bambini nella storia*, Roma-Bari, Laterza, 2010; E. Becchi, D. Julia, *Storia dell'infanzia*, Roma-Bari, Laterza, 1996; C. Colmenar, *La protección a la primera infancia en España en el primer tercio del siglo XX*, «History of Education & Children's Literature», vol. I, n. 1, 2006, pp. 167-191; P.S. Fass, *Encyclopedia of Children and Childhood in History and Society*, 4 vols., Farmington Hill, MI, The Gale Group, 2004; P. Dávila, L.M. Naya (edd.), *La Infancia en la Historia: espacios y representaciones*, 2 vols., Donostia, Erein, 2005 or P. Rodríguez, M.E. Mannarelli (edd.), *Historia de la infancia en América Latina*, Universidad Externado de Colombia, Bogotá, 2007.

it can be seen that during the nineteenth and twentieth centuries<sup>6</sup>, every Western country had its own process for developing child assistance and protection policies. However, it has been noted that, despite cultural, religious, economic, social and educational traditions, there is a certain consensus in the kinds of policies that were applied, due to the consequences of industrialisation and the high rate of infant mortality.

Accordingly, one of the most innovative elements at the beginning of the twentieth century was the transition from national protective policies to supranational agreements. Via this route, Europe and the Americas came to share the same concerns about child protection. This phenomenon led to the holding of conferences, which managed to harmonise a shared medical discourse through the expansion of paediatrics into a developmental discipline about «normal» children and the new role of responsible motherhood. All of this set the stage for international treaties<sup>7</sup> as well as the emergence of international organisations like the League of Nations and its successor, the *United Nations*, on the heels of the two world wars.

In this process of transition as well as interaction, the international conferences forged what Rollet<sup>8</sup> calls «a common culture». During this period, many countries participated in the discussions about the definition of child, the ways to protect children, child labour and the role of education, as did many medical, educational or sanitation associations, in order to address the fundamental issues that rose to prominence in the nineteenth century such as infant mortality and the poverty in which many families lived. As a result, the construction of the modern concept of the minor is based on law and the various forms of state intervention that «played a crucial role in shaping the modern concept of minor»<sup>9</sup>. This set of phenomena contributed to the construction of a discourse in which children acquired a social representation with a certain profile: children are beings in need of help.

Discussions at the conferences on children revolved around two poles: «one more legal and theoretical, and the other more pragmatic»<sup>10</sup>. In terms of the legal pole, there was concern for the responsibilities of states or of families with regard to abandoned children, juvenile delinquency and guardianship. By

<sup>6</sup> For a thorough understanding, see «Annales de Démographie Historique», n. 2, 2001, pp. 5-100, issue dedicated to «Enfances». See the journal on <[http://www.cairn.be/revue.php?ID\\_REVUE=ADH](http://www.cairn.be/revue.php?ID_REVUE=ADH)> (last accessed: June 30<sup>th</sup>, 2014).

<sup>7</sup> P. Dávila, L.M. Naya, *La evolución de los derechos de la infancia: una visión internacional*, «Encounters on Education», vol. 7, n. 1, 2006, pp. 71-93.

<sup>8</sup> C. Rollet, *La santé et la protection de l'enfant vues à travers les congrès internationaux (1880-1920)*, «Annales de Démographie Historique», vol. 1, n. 1, 2001, pp. 97-116.

<sup>9</sup> G. Therborn, *Los derechos de los niños desde la constitución del concepto moderno de menor: un estudio comparado de los países occidentales*, in L. Moreno, *Intercambio social y desarrollo del bienestar*, Madrid, Consejo Superior de Investigaciones Científicas, 1993, p. 87.

<sup>10</sup> Rollet, *La santé et la protection de l'enfant vues à travers les congrès internationaux (1880-1920)*, cit., p. 99.

1883 this interest had emerged as a result of the first *International Congress for the Protection of Children*, held in Paris. On the other hand, the pragmatic medical-sanitary pole was more concerned with early childhood and treating the most common diseases, in addition to opening up the field of paediatrics and introducing sterilized milk, as can be seen in the various conferences on health and sanitation. In this second, more pragmatic area, crucial events were the three *International Milk Depot Congresses* (Paris, 1905; Brussels, 1907 and Berlin 1911), which had an unprecedented success, both because of the large number of participating countries and the presence of paediatricians with highly scientific expertise. Countries that had a significant presence at the three conferences were France, Germany, Belgium, the United Kingdom, Spain, Italy, Argentina, the Netherlands and Switzerland<sup>11</sup>. These conferences naturally had an influence on the creation of this type of institution in the various countries.

These conferences addressed a great variety of subjects: sanitation, family education, paediatrics, courts for children, vacation camps, public assistance, etc.<sup>12</sup> This amalgam of interests is where Rollet's «common culture» was constructed, and it is also where the limits and possibilities of the discourse on childhood were set out, offering a social representation that still exists today. Among the countries with greater convening power, France stands out far beyond any other country, followed by Belgium, with 50 per cent fewer conferences; then come Italy, Spain, the United States, Switzerland, Germany, England, Argentina, Hungary, Sweden, Brazil and other Latin American countries due to the celebration of the Pan American Child Conferences starting in 1916<sup>13</sup>.

At the same time, international associations also had an important part to play in the organisation of these types of conferences, which were held with some regularity. The most important associations include the *International Association for Child Welfare*, the *International Union for the Protection of Children in Early Childhood*, the *International Save the Children Union* and the *League of Red Cross Societies*. These four associations were able to work together to organise the International Congress on Child Welfare, which was held in July 1928 in Paris and attended by more than 2,000 foreign delegates.

<sup>11</sup> *Ibid.*, pp. 104-106.

<sup>12</sup> J.L. Barona, *El Consejo Superior de Protección a la Infancia y Represión de la Mendicidad (1904-1914). Su ideología social y sanitaria*, in E. Perdiguero, *Salvad al niño*, Valencia, Seminari d'Estudis sobre la Ciència, 2004, pp. 121-155; Dávila, Naya, *La evolución de los derechos de la infancia: una visión internacional*, cit. Information about these conferences can also be obtained from the *Pro-Infantia* magazine put out by the Board of Governors of Child Protection (Madrid, Spain).

<sup>13</sup> D. Guy, *The Pan American Child Congresses, 1916-1942: Pan Americanism, Child Reform, and Welfare State in Latin America*, «Journal of Family History», vol. 23, n. 3, 1988, pp. 272-291; E.S.N. Nunes, *Os primeiros congressos panamericanos del niño (1916, 1919, 1922, 1924) e a participação do Brasil*, in *XIX Encontro Regional de Historia: Poder, Violencia e Exclusao. Sao Paulo, 8 a 12 de septiembre de 2008*, CD-ROM, 2008.

These congresses also involved the publication of books, informational brochures and other types of material, which allowed them to have greater public resonance. From the relationships that were forged at the conferences, a network of relationships and international associations were created, and their respective national committees and interdependent organisms facilitated the circulation of a shared discourse on a new representation of childhood. For the first time the child was a specific object of protection in various international treaties.

Apart from this international activity, we want to make mention of a curious text by Paul Godin that came out of the conferences and scientific meetings, not for its content but rather for its title, *Les droits de l'enfant*, whose first edition was in 1881 and the second in 1911<sup>14</sup>. The text is a doctoral thesis whose main focus is family medicine and, in particular, attending to the needs of children so that they grow up healthy. The concept of right which Godin uses has no legal meaning but instead refers to basic necessities. Thus, for example, when he speaks of the right of the body, he is in fact referring to the physical needs of children. However, the author's approach ended up being innovative, as it also embodied the need for unfettered education and the respect for certain rights of early childhood. His thesis was a criticism of the polluting practices of the past and offered a guide to paediatrics. Godin was a renowned military physician who published a large volume of works on medicine and medical anthropology. His text can be included in the field's output from the mid-nineteenth century and the first third of the twentieth century. Therefore, the text uses a discourse that had been already detected in the medical literature and in medical anthropology, and it also coincided with the topics covered at the abovementioned conferences<sup>15</sup>.

The whole process culminated, in the first third of the twentieth century, in an international network that was built up through conferences, associations and publications, mostly in Europe and the two Americas. The aim of the network was to address the protection of physically and morally abandoned children, to use a phrase in widespread use, at a time when the rights of children were unknown. Therefore, this era saw the construction of a supranational discourse in which the scope of the representation of childhood was the following: children in vulnerable situations must be protected by taking care of their basic needs. We find it useful to highlight this emerging situation in order to understand the emergence of various treaties on the rights of the child, which we shall examine below, and the role that such associations and institutions still play.

<sup>14</sup> P. Godin, *Les droits de l'enfant. Pages d'hier, pages d'aujourd'hui*, Paris, A. Maloine, 1911.

<sup>15</sup> L. Boltanski, *Puericultura e morale di classe*, Firenze, Guarraldi, 1972.

## 2. *The representation of childhood in international treaties*

The representation of childhood from the supranational and legal perspective has been little studied<sup>16</sup>. However, it's important to highlight the significance of the circulation of the discourse on childhood, given that it is a set of ideas shared not just by experts and professionals dedicated to the protection of children, but also by families and the population in general. This issue has been addressed by Moody<sup>17</sup>, who addresses how the rights of the child circulated through the three treaties that we reference below. His approach is from a socio-historical perspective and the contexts in which each of the treaties occurs. Through this approach he detects the concepts, institutions, actors and contexts that have influenced the rights of children. In this regard, the adoption of the treaties on the rights of the child should be understood as a statement that offers an institutional, trans-national and universal discourse built by political actors, non-governmental organisations and other social institutions. This construction has made a «universal» image of childhood possible, one that has ultimately become hegemonic. It is a discourse that crosses cultures, spaces and national policies, transforming children into a transnational object that is to be approached from an interdisciplinary perspective. Therefore, the institutionalisation of the rights of the child through supranational agencies has contributed to the dissemination, circulation and internationalisation of a limited discourse on childhood. In this regard, it is important to note that the «invention» of the rights of the child occurred in a supranational context in which international treaties were approved in the United Nations: the 1924 Geneva Convention, the 1959 Declaration of the Rights of the Child and the 1989 Convention on the Rights of the Child<sup>18</sup>.

In analysing these treaties, the first two questions that we pose are related to the length of the texts themselves and the identities of those who drafted them. Thus, while the *Geneva Declaration* of 1924 contains five principles, was drafted by a non-governmental organisation and was due to the personal involvement of Eglantyne Jebb (1876-1928), the *Declaration of the Rights of the Child* of 1959 contains 10 principles and was voluntarily approved under the

<sup>16</sup> I. Campoy, *La fundamentación de los derechos de los niños. Modelos de reconocimiento y protección*, Madrid, Dykinson, 2006; M. Depaepe, *Understanding the History of Childhood from the Perspective of Educationalization*, in E. Verhellen, *Understanding Children's Rights*, Belgium, Children's Rights Centre, University of Ghent, 1998, pp. 39-66.

<sup>17</sup> Z. Moody, *Transnational Treaties on Children's Rights: Norm Building and Circulation in the Twentieth Century*, «Paedagogica Historica», vol. 50, nn. 1-2, 2014, pp. 151-164.

<sup>18</sup> One can consult the full text of the Geneva Declaration of the Rights of the Child in <<http://www.un-documents.net/gdrc1924.htm>>, the Declaration of the Rights of the Child in <<http://www.un.org/cyberschoolbus/humanrights/resources/child.asp>> and the full text of the Convention on the Rights of the Child in <<http://www.ohchr.org/en/professionalinterest/pages/crc.aspx>> (last accessed: June 30<sup>th</sup>, 2014).

wing of the United Nations, and the *Convention* of 1989<sup>19</sup> is a document that contains 54 articles, had a long gestation period that saw the participation of national representatives, non-governmental organisations and other religious, civic or political entities, and was promulgated by the United Nations<sup>20</sup>. For this reason, there are differences both in the content and the promoters of the texts. We are not attempting to quantify the content of the texts, but rather our aim is to create a classification that allows us to identify the rights recognised in each of the treaties, and from that to establish a kind of discourse on childhood according to this international view and the establishment of a hegemonic and universal representation of childhood, despite the different situations that children around the world experience.

### 2.1. *In any situation, children first*

The domains in which the dominant discourse on the rights of the child is articulated and that seem to show a constant presence are the following: 1) Satisfaction of basic needs, 2) Family, 3) Assistance and protection in vulnerable situations and 4) Guaranteeing civil and political rights. In addition to these domains, three enduring rights that have been consolidated into immutable principles can be identified in all the texts. They are: 1) «the right to education», 2) the principle of «non-discrimination» and 3) the moral assumption of «children first», which acted as a rhetorical device that had no further policy development until the 1989 Convention, when it became «the best interest of the child». All these issues are very well laid out in the preamble to this last document. Two of these principles are established as «fundamental principles» of the Convention: «non-discrimination and the best interest of the child», in addition to the right of participation and right to life<sup>21</sup>. In other words, we are dealing with a discourse that has a simple structure, in which the dominating factors continue to be basic needs and protection, aspects that polarise the discourse on childhood.

We will first address the three enduring rights, and then focus on the four abovementioned domains. With respect to «the best interests of the child», the

<sup>19</sup> S. Detrick, *United Nations Convention on the Rights of the Child. A Guide to the «Travaux Préparatoires»*, Dordrecht-Boston-London, Martinus Nijhoff Publishers, 1992.

<sup>20</sup> N. Cantwell, *The History, Content and Impact of the Convention on the Rights of the Child*, in E. Verhellen, *Understanding Children's Rights*, Belgium, Children's Rights Centre, University of Ghent, 1998, pp. 377-392; E. Verhellen, *The convention of the Rights of the Child*, in E. Verhellen, *Understanding Children's Rights*, Belgium, Children's Rights Centre, University of Ghent, 1998, pp. 21-38.

<sup>21</sup> General Comment No. 5, *General measures of implementation of the Convention on the Rights of the Child (arts. 4, 42 and 44, para. 6)* CRC/GC/2003/5.



wording of the 3<sup>rd</sup> principle of the Geneva Declaration (1924) is the basis of the two subsequent documents. Thus, we see that there is a continuity in the drafting of this principle, although it was further qualified in each of the treaties, shifting from «the child must be the first to receive ‘relief’ in times of ‘distress’» (1924) to «the child shall ‘in all circumstances’ be among the first to receive ‘protection and relief’» (1959). Of course, this principle was later embodied by the motto «the best interest of the child» which was of great importance in the Convention, although it was already present in the Declaration of 1959<sup>22</sup>.

«Non-discrimination» already appears in the 1924 Declaration as part of the preamble rather than in the articles, where it is stated that the rights that are recognised are above «all considerations of race, nationality or creed». The final draft of the 1959 Declaration says that these rights shall be recognised for all children «without distinction of any kind, such as race, colour, sex, language, religion, political or other opinion, national or social origin, property, birth or other status». This last item of non-discrimination surely referred to the inclusion of children born out of wedlock. The Convention reflects this principle in its second article, in accordance with all human rights treaties, and does so in a very broad way, «without discrimination of any kind, irrespective of the child’s or his or her parent’s or legal guardian’s race, colour, sex, language, religion, political or other opinion, national, ethnic or social origin, property, disability, birth or other status». Moreover, it involves States Parties in guaranteeing those rights and protecting against all forms of discrimination<sup>23</sup>.

Finally, in terms of education, it is based both on the right of access to schooling and the content learned, geared toward peace and citizenship. Thus, since the *Geneva Declaration*, the belief has been that education is the best antidote to discrimination, especially by combining personal development and dedication and service to others. Starting with the 1948 *Declaration of Human Rights*, this right was oriented towards the development of «a spirit of universal brotherhood and peace». The 1959 text did the same thing in a more in a way elaborate way, although in the final draft, the 10<sup>th</sup> principle of the 1959 Declaration clearly established the «spirit of understanding, tolerance, friendship among peoples, peace and universal brotherhood, and in full consciousness that his energy and talents should be devoted to the service of his fellow men». This reasoning cannot be forgotten when we read articles 28 and 29 of the 1989 Convention, in which the goals of education are set out: the development of the child’s personality, of respect for human rights; of respect for the child’s parents, cultural identity and national values; of respect for other civilizations;

<sup>22</sup> P. Dávila, *Los derechos de la infancia, UNICEF y la educación*, in L.M. Naya (ed.), *La educación a lo largo de la vida, una visión internacional*, Donostia, Erein, 2001, pp. 61-117; I. Ravetllat, *El interés superior del niño: concepto y delimitación del término*, «Educatio Siglo XXI», vol. 30, n. 2, 2012, pp. 89-108.

<sup>23</sup> J. Rodríguez, *Un marco teórico para la discriminación*, México, Consejo para prevenir la discriminación, 2006.

the preparation of the child for a responsible life in a free society with respect for diversity and, finally, respect for the natural environment. Thus, the 1959 Declaration, the text states that, «the child has the right to receive education, which shall be free and compulsory, at least in the elementary stages». Starting with the *International Covenant on Economic, Social and Cultural Rights* of 1966, article 13 establishes this right definitively. In this way, article 28 of the Convention is established in such a way that State Parties must ensure the enjoyment of this right<sup>24</sup>. Therefore, these three rights constitute a profile which highlights the importance of education, non-discrimination and the defence of boys and girls in any situation.

## 2.2. *Family, protection and civil rights*

With regard to the different domains that we have identified (needs, family, protection and civil rights), «the satisfaction of basic needs» is, without doubt, a pillar that is present in all documents. It is true that in the early texts there is only an indication of where such attentions needed to go, but by 1989 there is a broad and well articulated conceptualisation. Thus, in 1924, it is only stated that, «the child must be given the means requisite for its normal development, both materially and spiritually». In the 1959 Declaration, aspects of moral and social development, among others, are taken up, and to those it is added that the enjoyment of such rights must occur «in conditions of freedom and dignity»; for the first time mention is made of «the best interest of the child» as a key consideration when enacting legislation. It should also be noted that this process includes a right that is unique to and characteristic of children: the right to engage in play does not appear in the documents until 1948 and, later, in the 1959 Declaration. These rights will be enshrined in the Convention in a more detailed manner.

Directly related to the harmonious development of boys and girls, «the family» is another domain whose presence continued to grow. Thus, while in the *Geneva Declaration* nothing is said about the family, in subsequent texts this situation is qualified, and it is stated in the 1959 Declaration that «society and public authorities will be required to care for children without family». At the same time, efforts were made to not separate young children from their mother, and it was even stipulated that in the case of large families, the State should grant them assistance. In the Convention, contrary to what some hasty

<sup>24</sup> K.D. Beiter, *The Protection of the Right to Education by International Law*, Martinus Nijhoff Publishers, Lieden-Boston, 2006; K. Tomasevski, *Human Rights Obligations in Education. The 4-A Scheme*, Nijmegen, Wolf Legal Publishers, 2006; P. Dávila, L.M. Naya (edd.), *Derechos de la Infancia y Educación inclusiva en América Latina*, Buenos Aires, Granica, 2011.

readings initially expressed, the family figures as one of the pillars, together with the State, for guaranteeing and protecting the rights of children.

However, we have to point out that where documents acquire greater strength is in the domain of «assistance and protection in vulnerable situations». This domain includes items relating to children with special needs, protection in cases of exploitation, and assistance and social security. The second principle of the *Geneva Declaration* broadly designated the possible forms this right to protection might take, and this continued to undergo refinement up to the 1959 Declaration. The change in the wording of this right is illustrative in that we can almost witness the evolution in the concepts that are applied to this population. Thus, we move from «delinquent», «backward», «orphan» and «abandoned» in 1924, to «maladjusted» in 1948, and from there to «physically, mentally or socially handicapped», finally arriving at the Declaration of 1959, which speaks of «the child who is physically, mentally or socially handicapped or suffers from social impediment». The same is true when it comes to protection in terms of all types of neglect, cruelty or exploitation, where the underlying question refers primarily to labour exploitation, as the 9<sup>th</sup> principle of the 1959 Declaration finally notes, reminding us that «the child shall not be admitted to employment before an appropriate minimum age [...] this is likely to prejudice his health or education».

In addition to these two items, the ability to benefit from safety and social security is another aspect that underlies these protection rights. The Convention devoted all sorts of attention to this: a series of articles related to mistreatment/abuse, labour exploitation, trafficking of drugs, sexual exploitation, the sale or trafficking of children, torture and the death penalty, as well as the wrongful retention of children, children deprived of a family environment, adoption, child refugees, mentally or physically disabled children, children belonging to minorities or indigenous peoples, armed conflict, justice for minors and social reintegration.

Finally, in terms of the recognition of «civil and political rights», it must be noted that these had a late entry in the area of the rights of the child and were incorporated as a result of the Universal Declaration of Human Rights of 1948. Thus, the right that provides children with a name and nationality appeared for the first time in the 1959 Declaration. However, as it has been pointed out so many times, one of the most significant innovations of the Convention is the extension of the rights of autonomy<sup>25</sup>, which have given rise to a different conceptualisation of the rights of the child, making the child a subject of rights. In this sense, these rights were specified not only in terms of name and nationality, but also in terms of freedom of expression, thought, conscience

<sup>25</sup> E. Ochaita, M.A. Espinosa, *Hacia una teoría de las necesidades infantiles y adolescentes*, Madrid, McGraw-Hill, 2004.

and religion, association, opinion of the child, protection of private life, and participation in accordance with his capacity and development<sup>26</sup>.

Therefore, it can be seen that the discourse on childhood during the twentieth century maintained a continuity based, above all, on the defence of two domains of differentiated rights, one concerning the protection and satisfaction of basic needs and another concerning the rights of autonomy. Thus, we can say that the continuity of a protectionist discourse on childhood was being maintained; the biggest rupture came in 1989 with the recognition of the civil and political rights of children, who were already subjects of rights. This implies a social and institutional representation that is characterised by the following elements: children are objects of protection who cannot be discriminated against, who have basic needs that must be satisfied, who have the right to a family and who have been recognised as having certain civil rights and fundamental freedoms. These last rights were the most controversial because they involved the autonomy of children and participation. It is upon this set of rights that the new paradigm of children was based: boys and girls are considered to be subjects of rights<sup>27</sup>.

### *3. The institutionalised representation of childhood: UNICEF and the Committee on the Rights of the Child*

In the previous section we approached the representation of childhood through the three treaties on the Rights of the Child, and in this section we approach the representation of childhood from the perspective of two supranational agencies working in the field of the rights of the child: UNICEF (which emerged after the Second World War) and the Committee on the Rights of the Child (which monitors the implementation of the Convention on the Rights of the Child (CRC) and has been active since the 1990s). Despite the fact that they began their work on the behalf of children at very different times, we are dealing with them together in order to determine the degree of continuance or change that has occurred since the last decade of the twentieth century. We use two sources: the 33 *State of the World's Children* reports that have been published by UNICEF since 1980, and 17 *General Comments* that have been drafted by the CRC since 2001.

Both bodies have created a discourse about childhood that is strongly anchored in the traditional discourse on childhood, and moreover they are both supporting a hegemonic discourse in the field of children's rights. However, differences have been noted in the profiles of each body. While UNICEF

<sup>26</sup> R. Hodgkin, P. Newell, *Implementation Handbook for the Convention on the Rights of the Child*, Geneva, UNICEF, 2007.

<sup>27</sup> *Ibid.*

continues to be anchored to the protectionist discourse where survival is the most important issue, the CRC has sought to develop a profile that is more in line with the principles of the Convention, although the influence of UNICEF is evident, especially with reference to the situation in developing countries. It should be remembered that UNICEF has explicitly recognised the Convention and plays an important role in the Committee on the Rights of the Child (article 45 of the CRC).

The hegemony of the representation constructed by these organisations contributes to the circulation of a discourse that involves the participation of social organisations, institutional organisations, NGOs, media, families, etc., which present a universal understanding of children and that hardly fits all the possible and real children. We have an example of this in public discussions of the Committee itself with the countries that present their reports. When attending one such event, there is the feeling that a shared language exists, one that is mediated by the hegemonic social and institutional representation and, therefore, other realities and situations that children face have no place. A good example of this is child labour, where the prevailing discourse is about its prohibition. But this is in stark contrast to the reality in many countries, and the demands that the child labourers themselves are making for their labour rights. This means that the world of children's rights is being constructed either without their participation, or with their participation but in a way that suits adults. In this sense, the discourse is in no way emancipatory and leaves the limitations of the Convention itself exposed<sup>28</sup>.

### 3.1. *UNICEF and the protectionist discourse on childhood*

Since its inception, UNICEF has fought to defend the rights of the child. However, the explicit recognition of these rights and the struggle to attain them was embodied starting in the mid-1980s, and unambiguously so in the 1989 Convention. From a general perspective, UNICEF's evolution follows a pronounced process, initially through programmes focused on development and later through emergency aid in conflicts and assistance to children in the 1950s. This stage is followed by three decades of development (1960-1980) with varied objectives: in the 60s, it was contributing to development; in the 70s, the focus was on basic services; in the 1980s, the focus shifted to the survival of children. Between 1980 and 2000, we were witnessing a rediscovery of children as a social group, which was translated into two strands within UNICEF: protection and survival, and starting in 1996, the rights of the child.

<sup>28</sup> M. Cordero, *Towards an Emancipatory Discourse of Children's Rights*, «The International Journal of Children's Rights», vol. 20, n. 3, 2012, pp. 365-421.

UNICEF's role in this process of convergence is essential, and it demonstrates continuous involvement in both strands. Thus, in 1996, for the first time in the history of UNICEF, the agency set its own «mission» within the system of the United Nations upon proclaiming that the Convention was to be the guide for their programmes<sup>29</sup>.

In order to see how UNICEF went about constructing its view of childhood, one of the best methods is to analyse the evidence available in the annual reports that UNICEF publishes under the title *State of the World's Children*. From 1980 to the present time, 33 such reports have been published<sup>30</sup>. In the initial reports UNICEF's lines of action were very focused on policies of assistance and protection of vulnerable children and on the issues of health and survival. Jim Grant's arrival at UNICEF in 1980 was a galvanizing force, and there was a radical change in the role that this body played at the international level, laying the base for the slogan «invest in children» – as important then as it is now – which became a way to translate theories about human capital to the world of children.

Regarding the frequency with which UNICEF has dealt with various aspects relating to children, we can see that the topics that have received the most attention are as follows: health and survival (reports from 1981-2, 1982-3, 1985, 1986, 1987, 1988, 1989, 1993, 1994, 1998, 2008 and 2009), and poverty and exclusion (1992, 2005, 2006, and 2012). However, it should be noted that many of these topics are interrelated with others that have to do with early childhood (2001), adolescence (2011), and children in the urban environment (2012). Therefore, the high frequency of these topics serves as basis for a conceptualisation of childhood that has a more protectionist view. There are additional topics that recur in the reports, particularly the role of women and girls, in order to highlight their importance to the development of children. In contrast, certain other issues have been addressed as specific cases, as in the case of the involvement of children in armed conflicts (1995 and 1996), child labour (1997), education (1999), the best interests of the child (2000), participation (2003) and children with disabilities (2013).

In order to be able to draw a profile of UNICEF's institutional representation of childhood, we must keep in mind the major change that came about in 1996, when UNICEF approved the Convention on the Rights of the Child as its mission. When analysing this representation, two stages can be discerned: one which corresponds to the period where UNICEF was run by J. Grant (1980-1995) and another that goes from 1996 until today. In the first stage, there are two clear issues. The first is the prevalence of topics related to health, poverty

<sup>29</sup> M. Black, *Children first. The Story of UNICEF, Past and Present*, Oxford, Oxford University Press, 1996; Dávila, *Los derechos de la infancia, UNICEF y la educación*, cit.; UNICEF, 1946-2006. *Sixty Years for Children*, Nueva York, UNICEF, 2006.

<sup>30</sup> *The State of the World's Children* reports are available at <<http://www.unicef.org/sowc/>> (last accessed: June 30<sup>th</sup>, 2014).

and survival, and the second is Grant's commitment to securing a different vision for UNICEF<sup>31</sup>. In terms of health, there is concern for malnutrition and infant mortality; concern because many deaths could be avoided by applying advances in science, such as oral rehydration therapy (ORT), which prevents death caused by diarrhoea; the role of women in decreasing mortality rates; the need for a «sanitation revolution» (1985); breastfeeding and universal immunization. In 1987 UNICEF stressed that there were two emergencies, one of which was silent (the millions of children who died of preventable diseases) and the much louder emergency of drought and hunger<sup>32</sup>. This discourse, which clearly puts the situation of the world's children, especially those in developing countries, at the forefront, would be a mere denunciation if the reports themselves did not show the other ideological line that was based on the principle of «invest in children» and explained the role of UNICEF and its duties to the world. That in 1980 Grant claimed a promising future for the year 2000 based on the concept of «investment in human capital» was very illustrative, bearing in mind that investing in children meant paying attention to social justice and rethinking economic policy, an issue that repeatedly appeared in reports over the years (1980, 1981 and 1986).

With respect to the second stage, we took the 18 reports from 1996 through 2013 as a document corpus. The first issue that we looked at is that there is a set of rights contained in the Convention that UNICEF has not addressed to a substantive degree in any of its reports. These rights are as follows: Identity; Adoption; Freedom of expression, thought, conscience and religion; Freedom of association and peaceful assembly; State protection of privacy, home, family and correspondence; Access to adequate information; Protection against abuse and neglect; Rest and leisure, play and recreational activities, culture and arts; Protection from trafficking, sexual and other exploitation and drug abuse; and Protection against torture and the deprivation of liberty and dignity and value, even when the child has broken the law.

The absence of these issues in the UNICEF reports provides very important information about this organisation's concerns and the asymmetric treatment that certain rights receive relative to others. Thus, the absence of political and civil rights is illustrative, although there is a monographic issue on participation that could supplement the lack of interest in these types of rights, by which we mean freedom of expression, thought, conscience and religion and freedom of association and peaceful assembly. The theme of identity also receives a certain degree of attention, although it is diluted when referring to indigenous peoples or ethnic minorities. The absence in the reports of a significant proportion of

<sup>31</sup> R. Jolly, V. Soler-Leal (edd.), *Jim Grant. El visionario del UNICEF*, Barcelona, Ediciones del Serbal, 2002.

<sup>32</sup> UNICEF, *The State of the World's Children 1987*, New York, Oxford University Press, 1987.

these rights gives us a profile that excludes a substantial segment of what is meant by children in a global sense.

Although the Convention recognises children as subjects of rights, in light of these reports it is obvious that this profile is not comprehensive and that its commitment to a universal notion of childhood has to be restricted; instead, given their interests, they deal with the children who are most vulnerable and most in need of protection. As a mere anecdote, it can be said that in recent years since photographs of children began appearing on the cover of the reports, all of the photographs have reflected unprotected children. Therefore, we can say that almost half of the rights recognised in the Convention have not been the subject of a monograph nor have they been subject of any deep analysis in all the reports. On the other hand, a clear interest is shown in the following rights: Protection and special assistance if they lack a family environment; Protection from armed conflict; Special assistance for children with disabilities; Health and access to health care services; Access to social security benefits; An adequate standard of living; Education and Child labour.

Among these rights, the theme relating to health and survival remains constant, given the treatment of issues such as malnutrition (1998), child survival (2008) and maternal and neonatal health (2009). There is another set of core topics, which could be called transversal, because their subject matter deals with various children's rights. For example, the 2001 report was dedicated to early childhood; the 2011 report on adolescence as a time of opportunity; the 2012 report on children in the urban world; and the 2013 report on children with disabilities. The themes dedicated to protection are also of interest. There are, thus, issues dedicated to participation in armed conflicts (1996), an issue on children under threat (2005), and an issue subtitled «Excluded and Invisible» that was dedicated to boys and girls in situations of vulnerability (2006). Finally we must highlight three issues that pay special attention to child labour (1997) and to education (1999 and 2004).

Nevertheless, we would like to highlight those issues that have been dedicated to analysing the previously mentioned four basic principles underlying the Convention on the Rights of the Child: non-discrimination, the best interests of the child, participation, and survival. The themes relating to survival have been dealt with extensively and we can say the same for issues relating to non-discrimination, since it appears many times in a transversal manner and even in monographic form in the 2004 issue, which analyses discrimination faced by girls. The themes of participation and the best interests of the child have not been of the same degree of relevance; the former was treated in the 2003 report, and the latter was treated extensively in the 2000 report. Therefore, based on the profile that is drawn from titles of the reports as well as the amount of space allotted in the reports, we can state that the institutional representation that the UNICEF reports offers is very focused on the rights of protection, health and survival, and non-discrimination; topics which can be understood as civil



rights, like participation, on the other hand, have a lower profile. Due to the absence of civil freedoms and rights in the reports, the profile that UNICEF provides for these topics is non-existent. In view of such profiles it becomes clear that UNICEF has focused its core concerns on the rights of health and protection that it has traditionally singled out, despite the rhetoric that this body normally makes use of in defending the rights of the child. Therefore, in light of this analysis, we see that UNICEF shares the protectionist discourse, where the Convention on the Rights of the Child ends up playing a rhetorical role, which is also defended by other institutions and supranational bodies. That is, a politically correct discourse concerning the rights of the child is maintained, but intervening in active policies in terms of their realisation is avoided. Behind this general framework, the lines that make up the architecture of the representation of the child by UNICEF have been clearly marked, but it is missing all the nuances that can be seen in a more detailed analysis of these reports. At the discourse level, then, UNICEF's rupture is very weak in the face of the prevailing traditional protectionist discourse. Aside from this, UNICEF has made a series of proposals for solutions based on the analysis of the reality that is seen in the situation of the world's children.

### 3.2. *The Committee on the Rights of the Child: a new profile for childhood*

The representation of childhood constructed by the Committee on the Rights of the Child<sup>33</sup> is of singular interest given that within the United Nations system this agency is responsible for implementing the Convention. Since 1991 it has issued concluding observations to countries after having analysed the reports that are periodically submitted to the Committee by the States Parties. It is therefore an authoritative voice that knows first-hand the situation of the world's children. Currently, the Committee is composed of 18 independent experts appointed by the General Assembly of the United Nations. Together they embody a set of specific characteristics that are related to the defence of human rights and their training as experts in various areas<sup>34</sup>.

The Committee's work is complex because it must examine the States Parties' reports on the development of the rights of the child, in addition to the reports relating to the optional protocols and the alternative reports from various non-governmental organisations. The Committee holds meetings in Geneva three

<sup>33</sup> One can consult Information on the working method of the Committee on the Rights of the Child and all General Comments at <<http://www.ohchr.org/EN/HRBodies/CRC/Pages/CRCIndex.aspx>> (last accessed: June 30<sup>th</sup>, 2014).

<sup>34</sup> J. Cardona, *La Convención sobre los Derechos del Niño: significado, alcance y nuevos retos*, «Educatio Siglo XXI», vol. 30, n. 2, 2012, pp. 47-68. J. Cardona is a member of the Committee of the Rights of the Child since 2010.

times a year. The members of the Committee, in addition to the abovementioned work, carry out internal technical sessions prior to each session, which usually leads to the publication of *General Comments*, which address the application of certain articles of the CRC, whose content the Committee has interpreted<sup>35</sup>.

The best way to understand the Committee's process of constructing the representation of childhood is by analysing the published General Comments. From the Committee's beginning to the present day, 17 General Comments have been prepared, addressing measures taken of countries' implementation of the Convention and also specific rights. Unlike what we have seen with UNICEF, the diversity of themes addressed by the Committee is broader. This is an important achievement given that our analysis of UNICEF covers a period of 35 years, while the Committee (founded in 1991) published the first comment in 2001.

In comparing the Committee's *General Comments* and UNICEF's *State of the World's Children* reports, the following themes have been addressed by both bodies: Education (Committee, 2001 and UNICEF, 1999); People with disabilities (Committee, 2006 and UNICEF, 2013); Early childhood (Committee, 2005 and UNICEF, 2001); Health and survival (Committee, 2003 & 2013 and UNICEF, 1981-82, 1982-83, 1985-89, 1993, 1994, 1998, 2008, 2009); and Participation (Committee, 2009 and UNICEF, 2003). Therefore, on a first reading it can be shown that the Committee is constructing a representation of childhood that has a much more complex profile and a much greater variety of themes can be discerned. In the Committee's comments we see less repetition of topics related to health and survival, which has been very frequent in UNICEF's reports. Moreover, the Committee has paid attention to three of the four general principles of the Convention (participation, the best interests of the child and survival), but it has not written any comment on non-discrimination. However, it is understood that when the Committee refers to the situation of indigenous children or children with disabilities or other rights, it is doing so from this standpoint of non-discrimination.

The construction of this representation is supported by the opinion of the 18 experts who offer their recommendations, but the Committee also offers a more detailed image in the *General Comments* it drafts. The study carried out for the cases of Europe and Latin America<sup>36</sup> shows that not all of the rights of children are implemented in the same way. Thus, civil rights and basic freedoms have a scant presence in reports that are drafted by some countries, while the rest of the rights take on greater importance. This demonstrates two different behaviours. While the members of the Committee are concerned with developing the rights in the Convention from the perspective in which the child

<sup>35</sup> *Ibid.*

<sup>36</sup> P. Dávila, L.M. Naya, *Education and the Rights of the Child in Europe*, «Prospects», vol. 37, 2007, pp. 357-367; Dávila, Naya (edd.), *Derechos de la Infancia y Educación inclusiva en América Latina*, cit.

is a «subject of rights», when it comes to implementing the rights, the countries are anchored in traditional protectionist discourse.

In the 17 General Comments drafted by the Committee, we observe a profile of children that is much more kaleidoscopic in so far as it opens the analysis to a broader set of rights, and in general it offers many nuances thanks to the work of the Committee members. It should be kept in mind that it is the Committee who interprets the rights enshrined in the Convention, and that their interpretation is mediated by the experience they accumulate over time. It is therefore an image constructed by experts who have contrasting views due to their differing origins. In this regard, the members of the Committee can better assess different populations of children and offer an image that better fits reality. By simply enumerating the General Comments, it can be seen that in contrast to the view of UNICEF there is a focus on topics such as the right to education, participation, the best interests of the child, the role of private corporations, play, juvenile justice, indigenous children, etc., resulting in much more complex view, insofar as it serves a broader range of children's rights. However, there also some gaps or absences, especially in the area of child labour and sexuality. These are two rights that could underpin an emancipatory discourse on childhood but they are absent in the views presented by both the Committee and UNICEF. It is true that the existence of the *Optional Protocol on the Sale of Children, Child Prostitution and Child Pornography* can bring the theme of sexuality to the recommendations that the Committee itself has to write based on the reports by the States Parties that have ratified this protocol. However, this is not obstacle to the Committee's ability to draft general comments on this topic. Therefore, the institutional representation of childhood set by the Committee offers a more robust profile with regard to the consideration of children as subjects of rights, where the majority of nuances fit into this concept. The rupture in the protectionist discourse has not occurred, although it is no longer hegemonic. Therefore, the process of changing the social representation of childhood is very slow, given that social inertias are still present, especially when the construction has been carried out on a model of Western children that is passed as being universal.

### *Conclusions*

Throughout the twentieth century there has been the explicit recognition of children's rights at a universal level through international treaties approved at the headquarters of international organisations with a broad base of represented countries. This recognition was preceded by a series of protection policies for children in various Western countries. In addition, at the beginning of the twentieth century, a series of international conferences were held in which

people were already discussing issues related to survival and the protection of children, the key issue in the construction of a particular representation of childhood.

Through this process arose the possibility of approving international treaties that defended the rights of children. Indeed, throughout the twentieth century treaties we have witnessed the approval of two declarations on the rights of children in 1924 and 1959, which were non-binding to the signatory countries, and a Convention in 1989, which did bind the signatory countries. These texts present a profile that is predominated by the rights of survival and protection in vulnerable situations. The Convention, from the point of view of legal technique, is better drafted and encompasses a set of civil, economic, social and cultural rights.

The representation of childhood in these treaties is constructed through the idea of a «common culture», which had already been created at the beginning of the twentieth century. On the other hand, based on the background of the treaties on the rights of the child, UNICEF and the Committee on the Rights of the Child have constructed a discourse that is adapted to each circumstance. While UNICEF clearly maintains that the representation of childhood is based on care and protection, the Committee takes a view of rights that reflects what is in the Convention.

In the institutionalised discourse, the protectionist discourse that is directly related to the protection and assistance programmes developed by UNICEF prevails. This prevents the development of a clearly emancipatory discourse on childhood. The substance of the institutionalised discourse has not changed since the nineteenth century, when in different European and American countries legislation prohibiting child labour and establishing compulsory education was passed.

The gap that exists in the representation of children's rights due to the focus of the rights, especially since the 1989 Convention, has involved a change in the view of childhood; however, it also maintained a discourse rooted in a protectionist view, given that the innovations that have been introduced since the 1990s have permeated but not penetrated the social practices related to childhood.

This discourse, easily detectable in the texts, has been assumed by a broad group of organisations both within and outside government and in general by society itself, who have assimilated it as a new rhetoric in favour of children, noting its limitations and possibilities. In this regard, through the analysis of documents produced by UNICEF and the Committee on the Rights of the Child, we see that the institutional representation of childhood is consistent with some rights in particular (survival and protection), while it is less demanding about civil rights and participation. In short, given this situation, it could be said that the discourse on the rights of the child serves the same function as the discourse on child protection: there is investment in those who are most needy both physical and morally, but there is a significant gap when it comes to empowering children.

# Children travelled to India too

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**ABSTRACT:** Margareta Petersson took her doctorate in 1988 with the dissertation *Indien i svenska reseskildringar 1950-1975* [*India in Swedish Travel Accounts 1950-1975*]. In that study Petersson problematizes travel writing as a genre and discusses whether it should be regarded as documentary or fiction. Furthermore, she focuses on the picture of India that is conveyed in a number of travel accounts, how they are tied to their time, and what values and patterns of thought, here called norms, are established. In my article I proceed from part of Petersson's analysis to study how travels to India have been described in some Swedish books for children. I consider travel literature as a genre with reference to child readers, and I examine the context in which the narratives arose. I also examine how the image of India is constructed in these accounts and how this image is coloured by the genre affiliation of the narratives and the time when the story was written.

**EET/TEE KEYWORDS:** Travel Literature; Children's book; Children's and Youth Literature; India; XX<sup>th</sup> Century.

## *Introduction*

Travel literature written for children and also about travelling children differs in many ways from travel literature written by adult authors who have travelled in the countries they describe and are writing for an adult audience. A significant and crucial difference when it comes to the children's books is that it is an adult author writing about an often fictitious child's adventurous journey. The child cannot be expected to have the necessary knowledge or overall view, and therefore these accounts are told in the third person by an omniscient narrator who can provide explanations. In these narratives there are often clear educational and didactic intentions, and the form of the travel account carries the meaning. Utility is combined with pleasure, and the child readers are supposed to learn something about the destination in the course of the journey, and gain greater insight into what other countries are like and how people there

live. This article presents a chronological examination of how travels to India have been described in some Swedish books for children from the time after the Second World War. I consider travel literature as a genre with reference to child readers, and I examine the context in which the narratives arose, which is also reflected in the accounts. I also examine, from a postcolonial perspective, how the image of India is constructed in these accounts and how this image is coloured by the genre affiliation of the narratives and the time when the story was written.

### *Children travelling*

Margareta Petersson took her doctorate in 1988 with the dissertation *Indien i svenska reseskildringar 1950-1975* [India in Swedish Travel Accounts 1950-1975]<sup>1</sup>. In that study Petersson problematizes travel writing as a genre and discusses whether it should be regarded as documentary or fiction. Furthermore, she focuses on the picture of India that is conveyed in a number of travel accounts for adult readers, how they are tied to their time, and what values and patterns of thought, here called norms, are established. In my study I proceed from part of Petersson's analysis to study how travels to India have been described in some Swedish books for children barn and I bring the study up to 2011, when the most recently published picture book appeared.

Here it is interesting to study both what knowledge is considered important when the image of India takes shape in the narrative and what norms – in the form of attitudes, values, and themes – are more or less visibly inscribed in the narrative<sup>2</sup>. It is doubtful whether these stories of fictitious journeys can be called travel accounts, since they are not literary descriptions of journeys that were really undertaken, but are merely cast in the mould of the travel account, using its patterns to describe adventures in exciting settings and to give Swedish children some knowledge of an exotic foreign country. I have therefore chosen to call these stories fictitious travel accounts because the destination is a geographical place that actually exists, unlike, say, the travels in fantasy literature where the places exist only in the invented world.

Fictitious travel accounts for children have developed out of ancient narrative patterns and coincide well with the old form of storytelling for children which we find, for instance, in fairytales where the child travels out into the world, experiences adventures and encounters dangers, then returns home strengthened with new knowledge and insight<sup>3</sup>. A pattern was set by one of the most famous

<sup>1</sup> M. Petersson, *Indien i svenska reseskildringar 1950-1975*, Lund, Lund University Press, 1988.

<sup>2</sup> *Ibid.*, p. 25.

<sup>3</sup> V. Edström, *Barnbokens form*, Göteborg, Förlagshuset Gothia, 1982, p. 25.

Swedish child travellers, Selma Lagerlöf's Nils Holgersson<sup>4</sup>, who is educated and developed on his journey through Sweden on the back of a goose in *The Wonderful Adventures of Nils*, 1906-1907. Most child protagonists do not travel as far as to India, but even a shorter journey can be what Vivi Edström calls «a didactic research trip» where the leading character learns about geography and culture while the reader is simultaneously expected to do the same<sup>5</sup>. In *The House as Setting, Symbol, and Structural Motif in Children's Literature* Pauline Dewan pointed out «that for children, home is the preeminent place in their lives, a place charged with great emotional significance»<sup>6</sup>. But she goes on to say that «all children must, at some time, leave home and enter the larger world beyond»<sup>7</sup>. In a later study, *The Art of Place in Literature for Children and Young Adults: How Locale Shapes a Story*, Dewan also highlights the importance of travelling in fiction for expanding one's knowledge of what the outside world is like: «To broaden horizons geographically is to extend a reader's knowledge of other cultures and peoples. [...] By reading novels, children are introduced to a range and variety of places that most of them would not otherwise be exposed to»<sup>8</sup>. She continues: «Places in the literature interconnect, forming patterns and designs that provide order, coherence, and meaning for readers»<sup>9</sup>. From this perspective it is interesting to ask what this world looks like and what picture of reality is presented. Today most children are able, through the media, to acquire information about what different countries look like, but at the time when the early accounts of journeys to India were written, this possibility was highly limited.

Apart from the fictitious travel accounts there are several other genre hybrids describing journeys to or in India for child readers, where the focus is not on the travel itself; that is only there as a part of the plot<sup>10</sup>. In this article I cite

<sup>4</sup> S. Lagerlöf, *Nils Holgerssons underbara resa/The Wonderful Adventures of Nils* (1906-1907), New York, Dover Publications, 1907.

<sup>5</sup> Edström, *Barnbokens form*, cit., p. 31.

<sup>6</sup> P. Dewan, *The House as Setting, Symbol, and Structural Motif in Children's Literature*, Lewiston, NY, Edwin Mellen Press, 2004, p. 3.

<sup>7</sup> *Ibid.*

<sup>8</sup> Id., *The Art of Place in Literature for Children and Young Adults: How Locale Shapes a Story*, Lewiston, NY, Edwin Mellen Press, 2010, pp. 11-12.

<sup>9</sup> Dewan, *The Art of Place in Literature for Children and Young Adults*, cit., p. 18.

<sup>10</sup> For example, Gunvor Gränström, *Lill-Pyttan far till India*, Stockholm, B. Wahlströms, 1957, is best regarded as a «girl's book» or «long-series book». Ella Sennegård's *Birgitta reser till Indien*, illustrated by Eva Forss-Billow, Stockholm: Svenska Bokförlaget Bonniers, 1946, is more of a missionary story than a travel narrative, while Per Westerlund's *Med "Ökenvinden" till Indien: 3 svenska scouters spännande bilfärd*, Stockholm, AB Lindqvists Förlag, 1937, and *Villes och Valles äventyr i Indien: Två svenska scouters upplevelser bland tigrar, cobror och andra djur*, illustrated by Gunnar Widholm, Stockholm, Svenska Kyrkans Diakonistyrelses Bokförlag, 1938, are more like «boys' books» or «adventure stories». Per Westerlund (1898-1960) was a deacon, scout, traveller, author, and lecturer, and he wrote about 35 books, half of them about India, with which he was thoroughly familiar. *Med "Ökenvinden" till India* [With 'The Desert Wind' to India] has a title close to that of Åke Sparring's *Med Emma till Indien* (1954), both of them with

examples of a couple of genre variants of travels to India, and I use the method and the tools devised by Dominique Sandis to study how «nation(ality)» is manifested in literary constructions for children. In «nation(ality)» she includes «nation, culture, national character and identity»<sup>11</sup>. Sandis emphasizes essential components that are employed to construct and mark nation and nationality in literary texts and which can simultaneously be used as tools to catch sight of important areas and markers in the text:

Customs and Tradition  
 Religion  
 History and Cultural Heritage  
 Language and Linguistic Particularities  
 Geography / Flora and Fauna  
 Society / Everyday Life and Objects  
 Ideology / Politics  
 Narrative Particularities  
 Intertextuality<sup>12</sup>

Sandis claims that in most cases it is possible to see with the aid of this model how the components are used to create an image of a nation/nationality, whether it concerns «the construction of the ‘self’», that is, national identity in one’s own country’s children’s literature, or «the construction of ‘other’», that is, how a country and its people are described in other countries’ children’s literature<sup>13</sup>.

Many different factors interact when it comes to the way a country is portrayed at a certain point in history, and it is common for the author to use contrasts as a technique to bring out similarities and differences. Clare Bradford writes in her article *The End of Empire? Colonial and Postcolonial Journeys in Children’s Books* that «colonial texts are by and large organized through such binary oppositions as self and other, civilized and savage, white and black»<sup>14</sup>. The ethnologists Billy Ehn and Orvar Löfgren, in their book *Kulturanalys*, have summed up the symbolically charged properties that can be assigned to either «culture and order» on the one hand or «nature and chaos» on the other. «Culture and order» include terms such as civilized, cultivated, human, controlled, refined, rational, reason, head, thought, clean, moral, high, individuality, and upper class. «Nature and chaos» are associated with things

cars which are named and personified. Westerlund was the first person to drive a car from Sweden to India, for which he was awarded the Royal Automobile Club’s silver plaque and the Swedish Motoring Association’s gold plaque.

<sup>11</sup> D. Sandis, *Proposing a Methodology for the Study of Nation(ality) in Children’s Literature*, in S. Chapleau (ed.), *New Voices in Children’s Literature Criticism*, Lichfield, Pied Piper, 2004, p. 105.

<sup>12</sup> *Ibid.*, p. 112.

<sup>13</sup> *Ibid.*

<sup>14</sup> C. Bradford, *The End of Empire? Colonial and Postcolonial Journeys in Children’s Books*, «Children’s Literature», vol. 29, 2001, p. 197.



like primitive, wild, animal, uncontrolled, vulgar, irrational, emotion, body, hand, unclean, amoral, low, mass instinct, and underclass. These pairs of opposites can be used for a dual purpose in that they say something about the culture being described, and about the culture that indirectly describes itself by defining the other<sup>15</sup>. The pairs of opposites are very useful for catching sight of norms and values applying to different cultures.

### *Stina and Anders travel out into the world*

Margareta Petersson begins her dissertation by comparing three Swedish accounts of the Taj Mahal: by Oscar Rundblom (1959), Sven and Cecilia Lindqvist (1964), and Gunnar Fredriksson (1969). These travellers visited the same historic monument, but they describe it in completely different ways. The first two give personal accounts of the monument, while the latter does not write about the monument itself, instead giving room in the text to contemporary India, which has to do with the time in which the book was written, when there was a greater interest in people and society than before. The Taj Mahal can also be found in the children's book *Stina och Anders i Indien* [Stina and Anders in India]<sup>16</sup>, and here, in comparison with the material presented by Margareta Petersson, it is clear what a travel narrative for children looked like in 1957, that is, at the start of the period investigated by Petersson.

*Stina och Anders i Indien* is a fictitious travel account, written by Åke Sparring, who also wrote one of the travel accounts for adults that Petersson analyses. The author is not identical to the narrator of the text, and there is not much of the author's own experiences, although he has travelled in India, but there is a description of the surrounding external reality in which the travellers in the story move, and there is information about this reality<sup>17</sup>. Petersson writes of Åke Sparring's travel narrative *Med Emma till Indien* [With Emma to India]<sup>18</sup>: «The information about the country is more important than the information about the traveller. The subject thus takes a back seat in favour of the object»<sup>19</sup>, and here there are similarities to the way he tells the story for a child reader. India in Sparring's account for children in fact becomes an object to look at, and in this attitude and in the choice of information, the norms become visible, as Sandis says. Patricia Austen and April Whatley emphasize the significance of this: «no images in literature are more compelling than those found in literature for children as they formulate how children come to see and

<sup>15</sup> B. Ehn, O. Löfgren, *Kulturanalys*, Stockholm, Liber Förlag, 1982, p. 38.

<sup>16</sup> Å. Sparring, *Stina och Anders i Indien*, illustrated by Kåge Ahlbom, Stockholm, Ehlin, 1957.

<sup>17</sup> Petersson, *Indien i svenska reseskildringar 1950-1975*, cit., p. 13.

<sup>18</sup> Å. Sparring, *Med Emma till Indien*, Stockholm, Bonnier, 1954.

<sup>19</sup> Petersson, *Indien i svenska reseskildringar 1950-1975*, cit., p. 38.

understand the world»<sup>20</sup>. The twins Stina and Anders have been allowed to accompany their uncle Johan on his boat to India, and once they arrive there they receive a generous offer of a round tour of the country, and the narrative thus naturally takes on a geographical-chronological form. They travel together with a rich Indian boy of their own age and a teacher named Mr Banerjee, whose responsibility is to provide them all the time with historical and geographical knowledge corresponding to most of the components that Sandis lists. The interesting thing, however, is to see how the components are used and angled in the text in order to describe India, and this is done through selected facts of «traditional schoolbook character», partly through links to Swedish culture and history: When they reach Agra the teacher begins his lesson to Stina and Anders (and of course the reader): «Agra has long been famous for its craft products in marble», said Banerjee, ‘but we haven’t got time to look at those this time. Instead we shall deal with Indian history’<sup>21</sup>. History is summed up through descriptions of different ethnic groups, religions, invaders, conquerors, and missionaries, up to the coming of the Moghuls who «put an end to the confusion». Here Anders interjects what he knows about the Swedish poet Gustaf Fröding, who wrote: «I wish I were in Indialand»<sup>22</sup> and throughout the book this is how the new knowledge is firmly rooted in the reader, as the author brings in something that could be expected to be familiar at this time, as a way to make the new and unknown comprehensible. At the same time, this is a matter of creating national identity via the national poet Fröding and the Swedish «hero king Gustavus Adolphus», who helps to place Akbar the Great at the right time in history. The story then continues with Shah Jahan, who had so many beautiful women around him but loved only Arjmand, who was nineteen years old when she became queen and who died after having given «her master fourteen sons and daughters». Artists from all over Asia assisted in designing the Taj Mahal which was built in memory of her. On the spread with a photograph of the building it is described for the reader as a beautiful work of art. There are no humans present other than Stina and Anders; the building is an object, a piece of material cultural heritage to admire:

Through the opening they glimpsed a strange building which was white from the foundation all the way up to the highest dome. In the moonlight it made a ghostly impression, to say the least. / Marble-clad walls on either side of a mirror pond led up to the building, and only now, when they stood in front of it, did they realize how big it was – over 60 metres square and over 60 metres tall. The walls were inlaid with stones of different colours. Most remarkable of all were the windows, which had no glass but instead a lattice of carved

<sup>20</sup> P. Austin, A. Whatley, *From the Editors: Weaving the Strands of Images*, «Journal of Children’s Literature», vol. 27, 2002, pp. 3-4.

<sup>21</sup> Sparring, *Stina och Anders i Indien*, cit., p. 53.

<sup>22</sup> *Ibid.*

marble. / In silence they passed the two halls where there was not so much as a stool, and then entered the room under the central dome, which hovered 30 metres above the floor. Reflections of moonlight were filtered in from the surrounding rooms. In the middle of the floor stood two sarcophagi, also in marble<sup>23</sup>.

Children's literature in 1957 was all very traditional, and the time was not yet ripe to problematize or question Swedish society or what the rest of the world looked like. On the other hand, it was important to give readers factual knowledge and proper values in a lucid manner. The chapter *Agra under the Great Moghuls* has a somewhat moralizing conclusion where the reader learns that Shah Jahan's life ended unhappily. He himself had «come to power by having all the male members of the imperial family put to death», and in the autumn of his life he was the victim of treachery on the part of one of his sons, ending up imprisoned in a tower from which he had a view of the most beautiful of all his buildings. «After his death the empire disintegrated, India was once again divided into rival small states, and then the British came»<sup>24</sup>. The moral of the story is that this is what can happen if you are too interested in power and do not treat other people well! Nothing is written about Arjmand and the conditions in which she lived; this is hardly surprising because women when the book was published were invisible in history books. Arjmand is regarded solely as a beautiful object, in the same way as the burial monument she would be given.

### Values

Clare Bradford, in her study *Unsettling Narratives: Postcolonial Readings of Children's Literature*, has persuasively argued that children, when they are privileged by race (or whiteness), hardly can be regarded as powerless and submissive, and she calls for a more historicized and non-homogeneous approach to analysing the positions children assume both inside and outside the text<sup>25</sup>. Supriya Goswami, in her book *Colonial India in Children's Literature*, examines the links between children's literature and colonial Indian history and «the intersections of British, Anglo-Indian and Bengali children's books and defining historical moments in nineteenth- and early twentieth-century India», based on five historical events in colonial India. Supriya Goswami shows examples of how the Western (British) child protagonist «becomes a location of tremendous agency and the instrument by which destructive or harmful elements are wiped out in colonial India» and how the «English child, embedded

<sup>23</sup> *Ibid.*, pp. 55-56.

<sup>24</sup> *Ibid.*, p. 57.

<sup>25</sup> C. Bradford, *Unsettling Narratives: Postcolonial Readings of Children's Literature*, Waterloo, Ontario, Wilfrid Laurier University Press, 2007.

in a moment of historical trauma, successfully survives it to become a bridge-builder, a protector, and a triumphant agent of British modernization and technological advancement in the colonies». What makes the study interesting in relation to my study objects is the discussion of how the texts intended for children «seek to empower children (both real and fictional) by celebrating them as active colonial and anti-colonial agents»<sup>26</sup>.

To help in exposing the ideology and values in a book or an oeuvre it is useful to apply the eight questions first raised by Peter Hollindale in 1988 in his article *Ideology and the Children's Book*, subsequently developed in *The Hidden Teacher: Ideology and Children's Reading*. The first point concerns how transpositions and reversals in the text can influence values, while in the last point he brings out how the author's world view is also revealed through what is omitted from the text:

1. What happens if the components of a text are transposed or reversed?
2. Consider the dénouements of some books, and the happy (or unhappy) ending.
3. Are the values of a novel shown as a "package" in which separate items appear to interlock?
4. Is it a noticeable feature of some major "classic" children's books that they test and undermine some of the values which they superficially appear to be celebrating?
5. Are desirable values associated with niceness of character, and vice versa?
6. Does anyone in a story have to make a difficult *choice* – of behaviour, loyalties, values, etc. – in which there is more than one defensible course of action?
7. Is any character shown as performing a mixture of roles, especially roles with sharply differentiated contexts of friendship, safety or prestige?
8. Who are the people who "do not exist" in a given story?<sup>27</sup>

Hollindale himself thinks that the eighth and last point is the most important, since it concerns the people who are rendered invisible and those who are regarded as being of minor importance. How would the story be written if women and representatives of small conquered states were given prominence?

In the whole chapter *Agra under the Great Moghuls* there is not a single line about the contemporary India in which Stina and Anders find themselves, and when the next chapter, *India's Holy City*, starts, present-day India is described through the agricultural landscape and people bathing in the Ganges. Everything is seen through eyes of the young Swedes, and it is with their naive and unaware gaze that the local people are observed: «The steps were thronged

<sup>26</sup> S. Goswami, *Colonial India in Children's Literature*, New York-London, Routledge, 2012, pp. 2-3.

<sup>27</sup> P. Hollindale, *Ideology and the Children's Book*, «Signal», vol. 55, 1988, pp. 19-20; Id., *The Hidden Teacher: Ideology and Children's Reading*, Woodchester, Thimble Press, 2011, pp. 48-50.

with bathers, but not one was wearing a bathing suit. The men simply wrapped a cloth around their hips, while the women concealed themselves from top to toe in grey sheets. No one tried to swim. They just had a few dips and then got out again to sit under a parasol. ‘Is there no diving board?’ Stina wondered unsuspectingly»<sup>28</sup>. Margareta Petersson writes that, for «a European traveller India can seem like an alien and in many ways mysterious world». She goes on to say that «Travellers must thus interpret and describe the world they see – usually based on their inherent frames of reference»<sup>29</sup>. As for Stina and Anders’s journey, it is not just a matter of the perceptions or ideas which the author expresses and which construct his image of India, but also an image of what the author thinks that child readers ought to find out, what he believes they can be expected to know and understand, and the knowledge that can and should be conveyed to them. The colonial dominance and the consequences of colonialism, for example, are not discussed, since it is beyond what is considered suitable, but the author feels free to joke about the Indians’ ritual sacred dip in the Ganges, as a way to lighten up an otherwise fact-packed text.

Several scholars have done research of various kinds on children’s literature and the ideologies and values that guide publishers and authors. Many of the texts about children’s literature and ideology, for example a chapter in Peter Hunt’s *Criticism, Theory, and Children’s Literature*, deal with the educational aspect, and what chance the author has of actually influencing readers in a particular direction. These texts often also discuss what is appropriate or inappropriate in children’s literature, whether children’s literature is “innocent” or not, and whether it should be innocent or not. Peter Hunt argues that it is easy to imagine that children’s books are innocent in ideological terms. They are not, no more than publishers, authors, critics, parents, and others are neutral: «As a result, we fail to see not only that we cannot be apolitical, but also that much of the ideology in and around children’s books is hidden – and indeed often masquerades as the opposite of what it really is»<sup>30</sup>.

The twins Stina and Anders, who will soon be fifteen, undertake an educational journey, and the purpose of the story is to teach Swedish children as much as possible about India. The attitude to knowledge is clear right from the introduction, when they read up on India during the summer holidays in order to convince their anxious mother and dubious father that they have a sufficient sense of responsibility and know enough to be able to make the journey. They sit secretly in their hut reading and testing each other’s knowledge in a way that reflects the outlook on knowledge at the time: how many kilometres it is, as the crow flies, between two places, how many languages are spoken, what the rivers and the cities are called, and how many millimetres of rain fall in different

<sup>28</sup> Sparring, *Stina och Anders i Indien*, cit., p. 59.

<sup>29</sup> Petersson, *Indien i svenska reseskildringar 1950-1975*, cit., p. 9.

<sup>30</sup> P. Hunt, *Criticism. Theory, and Children’s Literature*, Oxford, Blackwell, 1991, p. 142.

places. When they subsequently show off their knowledge they impress their parents and their uncle, but in the conversation they have afterwards it turns out that they have not understood much of what they have read, and above all that they have not been able to put it into a context: «But where did you get all that about the caste system from?/ ‘I read it somewhere. I don’t know what it is either. What was that disease you mentioned, by the way? Malaria? What’s that?/‘No idea,’ whispered Anders, laughing»<sup>31</sup>. When they have been in India for three months, however, they (and the readers) know plenty about the caste system and malaria, but they still lack insight. Much of their knowledge is just curiosities taken out of context, regarded with the naïve and uncritical gaze of the tourist.

Stina and Anders have read in their books that India is a poor country, but when they encounter the poverty in Bombay they are amazed at what it actually looks like. Gnarled and filthy beggars’ hands are thrust out towards them, one girl has malaria and is shaking with fever and a boy has stumps where his legs used to be, and these people are described through the young Swedes’ eyes as non-humans, as «horrible beings»<sup>32</sup>. The description of these people is over after a couple of lines, and this is a clear example of how the poor can be associated with «nature and chaos» as a result of characteristics such as animal, uncontrolled, hand, unclean, and underclass. The rich boy they travel together with explains things and dismisses the begging as being inescapable and governed by tradition, and the reasoning can easily be compared to views commonly heard today about beggars in city streets: «Don’t give them anything,’ Biren had said, ‘because you’ll only make it worse! And remember that they are not all as poor as they look. They belong to the beggar caste, you understand, and that means that they have been trained or are still under training to become beggars. They cannot choose any other occupation. And it is far from certain that those children have no mother or father. They tell you that to make you feel sorry for them’»<sup>33</sup>.

The well-off Mr Roy, who is paying for their tour, explains to Stina that India is a land of contrasts: «You come from a very fortunate country and India is very poor. Yet I can tell you that it has got better in recent years. As you may know, India gained independence in 1947 and the British left. India was then divided into two states, the Indian Union and Pakistan»<sup>34</sup>. The teaching then continues, about religions and civil war, with no direct link to poverty or the people, and after slightly more than two pages we hear instead about gold-edged saris, that the finest street in Bombay has four lanes of traffic, and that the Indian national dress is called dhoti and looks like «nappies». Colonialism is not problematized, nor is the postcolonial society that was the «land of contrasts» at the time of the

<sup>31</sup> Sparring, *Stina och Anders i Indien*, cit., p. 14.

<sup>32</sup> *Ibid.*, p. 27.

<sup>33</sup> *Ibid.*, p. 28.

<sup>34</sup> *Ibid.*, p. 29.

Swedish twins' visit. History consists of wars and conflicts, and those who sum it up stand for «culture and order», the winners and the people with property.

Stina and Anders have undoubtedly learnt a lot from having constantly put questions to their teacher and received detailed answers, but at this time it would have been inconceivable to let children question, evaluate, or scrutinize information. The twins' internal development therefore mostly consists of maturing in such a way that they are able to look after themselves, not that they are given the tools to draw any conclusions about the colonial/postcolonial society through which they travel, with its old traditions and its many different ethnic groups. The knowledge they have acquired during their tour is mostly of the neutral and measurable kind, such as coal deposits, rivers measured in cubic metres per second, mountains measured in metres above sea level, language areas, and the fact that there are 3,000 jewellers in Bombay. Religion and religious festivals are described in the number of temples, the appearance of fine clothes, and exotic dishes. Familiar Swedish things are contrasted with foreign things; we (Swedes) are juxtaposed with «the others», the exotic ones, those whom we regard through our frame of reference and our ethnocentric gaze. We are the ones who represent culture and order, whereas India with its contrasts is portrayed as chaos. As for ethnic groups, these are also interesting to observe because they are primitive and wild; their way of life is described as being behind the times, not that it might be the most functional way for them in the environment where they live: «Quite near Bombay there live several Wedda tribes, *who have not even learnt* how to till the soil but instead live off fruit, roots, snails, and other small animals which they collect on excursions into the jungle. / 'Can't we go there?' asked Anders with a pounding heart. Real savages! That would be something to tell the boys in school»<sup>35</sup>.

Stina and Anders are the characters with whom readers identify, and it is through their eyes that the world is seen. It is also worth noting that they are portrayed as exemplary Swedish children, wholly in line with what Clare Bradford finds in her article *Children's Literature in a Global Age: Transnational and Local Identities*, where she shows how British girls and boys are depicted as «model children» compared with children who have had a «Colonial childhood»<sup>36</sup>. Through the image of the local people as «the others», influenced by nature and chaos, an image is simultaneously constructed of the two nice, enterprising, Swedish children, thirsting for knowledge, whom readers are supposed to identify with and regard as role models. They are open to everything that India has to offer them – as long as they can receive it as benevolently interested observers. Margareta Petersson writes about how descriptions of India by different authors show great similarities, which may be because they «reduce reality according to

<sup>35</sup> *Ibid.*, pp. 36-37.

<sup>36</sup> C. Bradford, *Children's Literature in a Global Age: Transnational and Local Identities*, «Nordic Journal of ChildLit Aesthetics», vol. 2, n. 1, 2011, p. 22.

the same template» and «they proceed from a shared pattern of thought». This has to do with «something one could call a Western self-perception»<sup>37</sup>. In my opinion this is reinforced in the accounts for children, because the adaptation to the young reader entails a further reduction and polarization to make the description clear and easily understood. It is easy now, 55 years later, to perceive the representation of the alien culture as being full of clichés, but it is important to see the narrative in its context together with other contemporary book series about children in foreign countries.

### *Children in foreign countries*

The Ehlin publishing house, and later Liber, published a number of books about the fictitious travels of Stina and Anders, these two bold young Swedes who were always prepared to travel and tell the children of Sweden what the world looked like. Åke Holmberg wrote three books: *Sverige söderut med Stina och Anders* [Sweden Southwards with Stina and Anders, 1956], *Sverige norrut med Stina och Anders* [Sweden Northwards with Stina and Anders, 1957], and *Stina och Anders på västkusten* [Stina and Anders on the West Coast, 1958]. They also travel to Spain and Portugal, South Africa, the Congo, Italy, the Orient, Australia, South America, Greece, Egypt, France, the Soviet Union, Japan, China, and the Holy Land, and they tell Swedish schoolchildren everything that is worth knowing both about the travel itself, which often starts with preparations such as their mother putting their clothes in order and their father applying for their new passports, and about the countries they visit. These books were written by different authors who were particularly well informed about a certain country, and they were illustrated with drawings and photographs. There are photographs by Anna Riwkin-Brick and drawings by the skilful and innovative Danish illustrator Jørgen Clevin, showing what other countries look like. Maps are printed on the inside covers. Several of the books were translated from the Danish and adapted to Stina and Anders from the journeys of the Danish twins Anne and Søren. These books were evidently intended to serve as additional reading in school, and they are close to the children's books that are called «faction» today, mixtures of facts and fiction. It is likely that Åke Sparring had to follow the guidelines of the publisher and the set design of the book series when he wrote about the journey to India, and the publishing house in all probability adapted its publications to the type of literature demanded by schools at this time, in keeping with the prevailing outlook on knowledge as expressed in the 1955 curriculum for elementary school. The 1950s and 1960s saw the publication of several series of books

<sup>37</sup> Petersson, *Indien i svenska reseskildringar 1950-1975*, cit., p. 24.



about children in other countries, both Swedish originals and foreign children's books, and it is in this context we should place the books about Stina and Anders's travels. Virginia A. Walter points out in *War and Peace Literature for Children and Young Adults: A Resource Guide to Significant Issues* that she regards «children's literature as cultural artifact, carrying the imprint of the values and customs of the society which produced it. This includes political values and ideologies, the beliefs and tenets of particular social segments or institutions. When the ideological message is overt, the text is seen as didactic, with an intent to teach a particular message or communicate a particular point of view»<sup>38</sup>.

A literary forerunner of the books about Stina and Anders is the series of 26 books that the American author and illustrator Lucy Fitch Perkins (1865-1937) wrote between 1910 and 1930 about twins in other countries: *The Eskimo Twins*, *The Dutch Twins*, *The Japanese Twins*, etc. Writing about twins, a girl and a boy, conforms to the view that child readers prefer to identify with a character of the same sex and that, by telling of a girl and a boy, one can attract both girls and boys to read. Moreover, there is something special about twins: «The effectiveness of twins as a trope lies, in part, in the idea that twins have a 'double the pleasure' effect on the viewer/reader»<sup>39</sup>. There are, for example, studies of how twins have been used in advertising since the commodity must be twice as good if two people share the same opinion of it<sup>40</sup>. Karen Coats writes in *Looking Glasses and Neverlands* that children's literature can be assumed to be based on an identification process that resembles what is used in advertising. Children's literature «depends on repetition – both the repetition of the same book, and the repetition of structures, images, and values across books», and here twins also constitute a repetition and double effect for the book series and the child reader<sup>41</sup>.

After the Second World War there was a conscious intention behind the publication of children's literature about children visiting foreign countries. It was not just so simple that the world was then opened for more extensive travel; it became something of a trend that also contained great hopes about the future: never more would there be war! An event that was typical of the time was that Jella Lepman (1891-1970) founded the Internationale Jugendbibliothek in Munich and the International Board on Books for Young People. Her idea was that if children in all countries had access to literature, mutual understanding

<sup>38</sup> V.A. Walter, *War and Peace Literature for Children and Young Adults: A Resource Guide to Significant Issues*, Phoenix, Oryx, 1993, p. 42.

<sup>39</sup> K. Dillon, 'The Heft of Both Countries in Your Fists': Lucy Fitch Perkins's Foreign Twins as Cultural Goodwill Ambassadors, «Children's Literature», vol. 39, 2011, p. 86.

<sup>40</sup> H. Schwartz, *The Culture of the Copy: Striking Likenesses, Unreasonable Facsimiles*, New York, Zone Books, 1998.

<sup>41</sup> K. Coats, *Looking Glasses and Neverlands: Lacan, Desire, and Subjectivity in Children's Literature*, Iowa City, University of Iowa Press, 2004, p. 7.

between different peoples and religions would increase, and the new generation of children, armed with this knowledge, would ensure that there would never more be war once they had grown up to become responsible adults. Today this may seem naive, especially when we look back and see how other peoples and countries were regarded in these books with our Western eyes, and how many problematic issues were swept under the rug, but the thought was good and hopes were high. Despite good intentions, many books were published which gave a distorted picture of Africans, Eskimos, Lapps, and American Indians. The primitives were romanticized, and the perspective was almost always that of the Westerner with his ethnocentric, and in many cases also colonial and imperialistic, gaze, describing the alien culture. Generalizations were common in both the texts and the illustrations<sup>42</sup>.

Among the serious projects was the fourteen photographic picture books about children in other countries produced by Anna Riwkin-Brick, published by Rabén & Sjögren from 1951 to 1968. Astrid Lindgren wrote the text for half of them, while the others were written by Eugénie Söderberg, Lea Goldberg, Cordelia Edvardson, and Vera Forsberg, who provided the text for *Salima bor i Kashmir* [Salima Lives in Kashmir, 1970]. This picture book begins with a description of Kashmir and the people who live there. Artistically perfect black and white photographs show how families live on boats and earn their livelihood by agriculture. Salima wants to go to school, as her brother does, but her grandfather, the head of the family, just laughs at the thought: «‘Girls at school – what an idea!’ he says». Salima exerts herself to do her work as well as possible and is finally rewarded when her grandfather consents and she is able to start school. On the last page she offers to read the newspaper aloud to her grandfather. There is no discussion about the conditions of girls and women in Kashmir, and the problem of inequality is resolved within the framework of the story. There is no questioning of the fact that it is mostly boys who go to school and that only one girl can be seen among all the boys in the picture from the school; it is left to the reader to wonder about this and react to it. Here the power order is reduced to what Sandis calls «Customs and Tradition».

Photographic art had previously been used in the service of colonial ethnography and to portray «the others»<sup>43</sup>. When we today study Anna Riwkin-Brick’s innovative picture books, we have to bear this background in mind. Today these books may seem to show a doctored image, a non-questioning continuation of the tradition of highlighting what was unusual and fascinating in other cultures, at the expense of difficult and problematic matters. It is important to realize, however, that these picture books nevertheless took a

<sup>42</sup> A.C. Brunnström *et al.*, *Barnböckernas främmande folk*, in K. Allroth, C. Sundström (edd.), *Barn, böcker och samhälle*, Verdandi-debatt, 55, Stockholm, Prisma, 1970, pp. 92-95.

<sup>43</sup> A. Loomba, *Colonialism/Postcolonialism*, London, Routledge, 2005; Swedish transl. *Kolonialism/postkolonialism: En introduktion till ett forskningsfält*, Hägersten, TankeKraft Förlag, 2006, p. 102.

large and decisive step in the right direction in their way of describing people from other countries, and they are full of warmth, respect, and genuine interest. Anna Riwkin had understood that «children» are constructed differently in different parts of the world, and she portrays this while simultaneously having a vision of the universal child who is fundamentally the same regardless of ethnic origin and geopolitical location. These photographic picture books were well suited to the contemporary view of how children's books about other cultures should be written<sup>44</sup>. The «trend» of writing about children in other countries was international and touched readers in all age groups<sup>45</sup>. One proof of this international spirit is that these books, above all the photographic picture books, were translated into a great many languages and were set in many countries.

Susan Louise Stewart, in her article *Beyond Borders: Reading 'Other' Places in Children's Literature*, discusses the problem that there are few books about other countries which are indigenous, presented to children in the West through translations from the original language: «[I]f we want to introduce students to literature that goes beyond our own national borders, we are often limited to a great extent to literature written about other countries by Western authors»<sup>46</sup>. None of these accounts was written by an author from the country concerned, and it is easy to imagine that, say, an Indian author would have painted a more faithful picture of India, but Clare Bradford emphasizes that this need not necessarily be the case:

It would be unsound to argue that indigenous texts produce 'better' representations of indigeneity than non-indigenous texts, or that they are more 'authentic', a term which generally implies adherence to an originary cultural identity. Indigenous identities are

<sup>44</sup> H. Ehriander, *Everyday and Exotic: Astrid Lindgren's Co-operation with Anna Riwkin-Brick*, in B. Kümmerling-Meibauer, A. Surmatz (edd.), *Beyond Pippi Longstocking: Intermedial and International Aspects of Astrid Lindgren's Works*, New York, Routledge, 2011.

<sup>45</sup> B. Bohman wrote the book series *Barn i främmande länder* [Children in Foreign Countries], which came about in consultation with UNESCO as a way to increase international understanding between children and teach them how people in other countries live and think, and the French photographer Dominique Darbois (born 1925), just like Anna Riwkin, undertook reportage trips for weekly magazines, which led to a number of photographic picture books about children in other countries. Her first book appeared in 1960, that is, a few years after Anna Riwkin's first book. In many ways the books are very like Anna Riwkin's photographic picture books, but with one exception they describe other countries. Dominique Darbois' books are set in Africa, Tahiti, Russia, India, Cuba, and Japan. These are the subject of Helene Ehriander's *Exotisk vardag: Anna Riwkin-Bricks och Astrid Lindgrens fotografiska bilderböcker*, in *Bild och text i Astrid Lindgrens värld*, H. Ehriander, B. Hedén (edd.), Lund, Absalon, Skrifter utgivna vid Litteraturvetenskapliga institutionen i Lund, 1997. For older children Svensk Lärartidnings Förlag published several books in the Saga series under the general heading *Adventures in Other Countries* – stories about how children live around the world. The book describing life in India is entitled *Raman, en pojke i Indien* [Raman, a Boy in India] and was written by S. L. Arora (1963).

<sup>46</sup> S.L. Stewart, *Beyond Borders: Reading 'Other' Places in Children's Literature*, «Children's Literature in Education», vol. 39, 2008, p. 95.

multifarious, inflected by factors including gender, class, sexuality and access to education, so that no text can speak for or about all indigenous people. Nevertheless, it is the case that non-indigenous texts are much more likely than indigenous texts to recycle the assumptions of dominant cultures<sup>47</sup>.

India is a large and multifaceted country, and cultural distances can be large within the country, although the geographical distances are smaller than for Swedish travellers who have come such a long way.

### *Times change*

In the 1970s there were changes to the genres dealing in different ways with children in other countries, which gave way to more problematizing and politicized narratives about power structures and repression, and covering issues such as child labour and «foundlings». Then the books were written by authors who endeavoured to describe the societies and the children from the inside, and the authors had often undertaken long journeys in the countries they wrote about. Social realism caught on, and the outlook on knowledge had changed. Gone was the kind of knowledge that can be measured and counted; now it was essential instead to convey a critical outlook on society and to understand connections. In Inger Brattström's *Hittebarn i Bangalore* [Foundling in Bangalore, 1970]<sup>48</sup> this is clear in Tina's musings about destitution, hunger, poverty, overpopulation, and her parents' sense of involvement, and it also shows how the perspective has changed so that the main character, a fifteen-year-old, understands that it is the Westerners – she and her parents (Mona and Peter) – who can be regarded as «the others»:

It's different with Mona, she has her practice and her patients, she is taking lessons in Hindi and finds it all terribly interesting. She talks and talks about all the problems, she and Peter are constantly talking politics and foreign aid and the world's conscience. / They want Tina to be a part of it, they want Tina to read books and see and discover and understand things. And to think that it is fascinating and interesting too! [...] And here everything is ordinary day-to-day life apart from themselves, Peter and Mona and Tina and their lives are remarkable and exotic. They're the ones that people turn round to look at in the street, it's their car and their clothes and hair colour they look at, they're the ones who are asked where they come from and what it's like to live in their country. When they say Sweden, hardly anybody knows what Sweden is. / And why should they? This is the world, the very centre, what counts. The other is outside, everything that is not India is outside<sup>49</sup>.

<sup>47</sup> C. Bradford, *Race, Ethnicity and Colonialism*, in David Rudd (ed.), *The Routledge Companion to Children's Literature*, London-New York, Routledge, 2010, p. 45.

<sup>48</sup> I. Brattström, *Hittebarn i Bangalore*, Stockholm, Saga, 1970.

<sup>49</sup> *Ibid.*, pp. 37-38.

The travels described in this book for adolescents lead to a children's home on the outskirts of Bangalore, where Tina's parents adopt a little girl. Tina, who finds it complicated to understand the structures behind the poverty they see all around them, acts intuitively and emotionally when she too wants to help a little girl and ensures that the prematurely born Kamala also becomes a part of their family. Inger Brattström (born 1920) made her literary debut with the girl's book *Elsies svåra år* [Elsie's Difficult Year, 1939]. Since then she has written some seventy books for children and young people, and in her work it is possible to follow the development of children's books from idyllic security to engaged stories about less privileged young people both in Sweden and elsewhere, about adopted children and refugee children who are not allowed to stay in Sweden.

Social realism is once again glimpsed in stories for children and adolescents in the new millennium, but descriptions of other countries and cultures take on completely new forms. Many young people today make long journeys to distant parts of the world, which is shrinking for young Swedes. The EU has opened its doors to Europe, giving infinite possibilities to young people with their whole life before them. Many therefore seek their identity out in the world and not, as before, back in history. Racism is a theme that is often glimpsed in adolescent literature, and there are also books with detailed descriptions of people and environments in other parts of the world. The books show people acting with resolve and responsibility, solidarity and commitment, and they try to explain – without simplification – how terrible things can arise. Just as in the post-war years, there is an underlying hope that these books will lead to increased awareness and mutual understanding in the long term.

Travel accounts are conspicuously absent in today's children's literature, despite the fact that children and adolescents travel much more today. An entertaining exception is the fictitious travel narrative *Kjelle åker till Indien* [Kjelle Goes to India, 2011] by Kajsa Gordan (born 1958) and illustrated by Mia Maria Güettler<sup>50</sup>. This is a colourful picture book, written in a time when animals can also go on holiday with an EU passport and a vaccination certificate. The whole story is based on some of the special expressive functions of picture books: the forward movement of turning the pages, the indications of direction in the individual picture compositions, and kinetic movement within each picture spread, all interacting to strengthen the impression of travelling<sup>51</sup>. The owner of Kjelle the dog is to go on a yoga course to India and Kjelle can accompany her. He is served a bone on the flight, and while his owner stands on her head, Kjelle runs around with the other dogs on the beach. The Indian dogs have no collars, they go where they want to, they beg at the restaurant kitchen, and they howl at the moon. The Indian dogs show Kjelle round, and Kjelle tells them about exotic Swedish things such as dog kindergartens and playing

<sup>50</sup> K. Gordan, *Kjelle åker till Indien*, illustrated by Mia Maria Güettler, Stockholm, Bergsh, 2011.

<sup>51</sup> U. Rhedin, *Bilderboken: På väg mot en teori*, Stockholm, Alfabet, 1992, pp. 169-171.

in snow. In this case there are no language difficulties and no culture clashes; the dogs just show a friendly interest in each other, and the illustrations further underline that they have more in common than they have differences. All the dogs are of an unidentifiable breed, which underlines the similarities and stresses that no dog is «finer» than any other. This is a reciprocal story of the encounter with another culture, and since the book is aimed at young children, the story focuses instead on the journey and the dogs' friendship, while the description of the environment around the coastal strip is contained entirely in the pictures.

A possible interpretation of the norm in the iconotext in *Kjelle åker till Indien* is that India is a country where other values are cultivated than those back home in Sweden, and this once again raises questions about «self and other» and how a differently cropped picture now shows a completely different India:

All these new conceptions of otherness shock us into a renewed perspective on the relationship of self and other. They point to the complexity and multipositionality of identity, reformulating the issue of identity as a matter of difference, hence challenging us to move beyond reductive binary structures of knowledge. For all these enabling reconstructions of social and cultural spaces, however, the counterhegemonic project of otherness politicized as radical/ethnic difference is far from fulfilling itself. For there still remain attempts to subjugate otherness to the imperialism of sameness, and the hegemonic West still tries to reduce radical cultural/radical difference to manageable proportions<sup>52</sup>.

In *Kjelle åker till Indien*, however, it is no longer a matter of India being lower down on a development scale, of old traditions standing in the way of modernization, of India sleeping while the West is awake, or of India having deficiencies whereas we in the West have come further in the economic, political, and cultural race in which India is hopelessly far behind us because the Indians are too bound by traditions and Hinduism and therefore are regarded as irrational<sup>53</sup>. It is no longer a matter of looking critically at India; instead the Western way of life is criticized when India is held up as a relaxed alternative to our rat race. The book shows that people in India understand the importance of spiritual development, calm, and inner peace, things that have got lost in the West in all the stress and consumerism. Here the roles have been reversed, and chaos and nature are now associated with freedom and ease. In India these ideals can be achieved and the focus has been moved from deficiency to resource, in the same way as in the American bestseller (and film) *Eat, Pray, Love: One Woman's Search for Everything across Italy, India and Indonesia* (2006) by Elizabeth Gilbert, with which *Kjelle åker till Indien*, and the other books in this article, engages in intertextual dialogue.

<sup>52</sup> S. Xie, *Rethinking the Identity of Cultural Otherness: The Discourse of Difference as an Unfinished Project*, in R. McGillis (ed.), *Voices of the Other: Children's Literature and the Postcolonial Context*, New York, Routledge, 2000, pp. 2-3.

<sup>53</sup> Petersson, *Indien i svenska reseskildringar 1950-1975*, cit., pp. 208-209.

# Emilio Salgari conteso e rifiutato

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## *Emilio Salgari contested and rejected*

**ABSTRACT:** Why generations after generations of young readers have loved Emilio Salgari and on opposite the literary criticism has expressed a refusal or a silence on his work for a lot of time? The essay offers many different reasons about the extraordinary reception of Salgari among the young people to the beginning of the XX<sup>th</sup> Century and the contribution explains the literary and educational reasons that are at the base of some critical position in the same years. The different visions around Salgari between young readers and adults can be understood analyzing the texts through the actual critical – interpretative lines. The Salgari's novels introduce contents and narrative techniques that favored the birth of the reading pleasure in the young readers and the cooperative relationship among author and reader during the XX<sup>th</sup> Century. In this context a new and modern children's reading develops itself and it overcomes the liberal educational and prescriptive logic that there was in the XIX<sup>th</sup> Century. Only after a long time it is possible an integration between needs of the young reader and educational demand: in the second part of XX<sup>th</sup> Century this integration becomes in mature and stable forms.

**EET/TEE KEYWORDS:** History of children's reading; History of children's literature; Literary criticism; Young readers; XX<sup>th</sup> Century.

Firenze, 6 novembre 1906

Caro Ceralacca  
Io ho da fare un osservazione [sic] sul «Giornalino»<sup>1</sup>  
Permetti? Sì?

<sup>1</sup> L'assenza dell'apostrofo dopo l'articolo indeterminativo tiene conto della scrittura infantile dell'abbonato.

Ora siamo in autunno, non è vero? Perciò principia il fresco ed i sandali son per l'ocche. Ma Vamba non ha fatto caso di questo, e li ha lasciati ... a chi? A quel bambino che prende le scosse elettriche e all'altro che si sforza a mettere un grosso dado su di un altro. Dunque ora il signor Vamba deve fare a questi due ragazzi un bel paio di stivaletti, e se occorre, anche le calosce. Almeno gli avesse fatto un paio di calze di lana grossa! Ma no, perché le calze con i sandali non vanno d'accordo. Spero che tutti gli abbonati siano del mio parere. Quanto è bello il «Giornalino»! Io lo stimo il più bello ed il più interessante di tutti quelli moderni e antichi.

Sono impaziente di aspettare un altro po' la pubblicazione del numero doppio, e la pubblicazione del *Figlio del Corsaro Rosso*, perché Sàlgari, o Salgàri, come vuoi, è il mio scrittore preferito. Nell'osservare questo ultimo numero del *Giornalino*, mi sono piacute le illustrazioni del racconto «il violino di Zio Bruno». Scusa se ti ho trattenuto troppo a leggere le mie sciocchezze. Augurando mille anni di felicità al «Giornalino» ti saluto.  
Giovanni<sup>2</sup>

Il tono confidenziale e schietto di Giovanni, un non meglio definito lettore del «Giornalino della Domenica», il celebre e rivoluzionario settimanale nato nel 1906<sup>3</sup> solo pochi mesi prima della presente lettera ma già assiduamente seguito da una schiera di ragazzi e ragazze della media e alta borghesia italiana, mette a nudo il modificato volto di un certo tipo di ragazzo di primo Novecento. Non affettato nel linguaggio ma nemmeno scortese, ironico e lieve, mostra spirito d'iniziativa, libera espressione di sé e ricerca un confronto tra pari di possibile condivisione che proprio i mutati spazi giornalistici permettono di rintracciare nelle rubriche della «Corrispondenza»<sup>4</sup>. Si tratta di nuove «piazze virtuali» nelle quali le «scritture bambine» manifestano una spontaneità espressiva sottratta almeno in parte al controllo adulto<sup>5</sup> che rimane invece strutturale in ambito scolastico e che è storiograficamente documentato in recenti e importanti studi relativi ai quaderni di scuola<sup>6</sup>. Le parole schiette del piccolo Giovanni sono una

<sup>2</sup> «Il Giornalino della Domenica», n. 22, 18 novembre 1906, pp. 18-19.

<sup>3</sup> Per un inquadramento critico sul «Giornalino della Domenica» si rinvia alla recente letteratura critica al riguardo e in particolare a C. Gallo, G. Bonomi (edd.), «*Il Giornalino della Domenica*». *Antologia di fiabe, novelle, poesie, racconti e storie diseguate*, Milano, Ed. Bd, 2007; A. Ascenzi, M. Di Felice, R. Tumino (edd.), «*Santa Giovinezza!*». *Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, Macerata, Alfabetica, 2008; P. Pallottino (ed.), *L'irripetibile stagione de «Il Giornalino della Domenica»*, Bologna, Bononia University Press, 2008.

<sup>4</sup> Per uno sguardo sui mutamenti introdotti nella pubblicistica all'inizio del Novecento e sul ruolo centrale svolto dal «Corriere dei Piccoli» e dal «Giornalino della Domenica» nel modificare gli spazi di libertà espressiva riconosciuti nelle rubriche della «Corrispondenza» si rinvia a S. Fava, *Piccoli lettori del Novecento. I bambini di Paola Carrara Lombroso sui giornali per ragazzi*, Torino, Sei, 2015.

<sup>5</sup> Gli studi di Egle Becchi sulle «scritture bambine» hanno giustamente sottolineato la cautela necessaria nell'interpretare tali fonti per l'elusività dell'infanzia come oggetto di indagine e sebbene le lettere dei lettori bambini non abbiano la pretesa di portare a certezze definitive, poiché sempre in bilico tra possibile ingerenza adulta e insopprimibile resistenza giovanile, esse conservano almeno elementi di autenticità senz'altro degni di attenzione poiché non scalfiti in radice da possibili interventi adulti o editoriali. *Ibid.*, pp. 21-26.

<sup>6</sup> Si vedano gli studi compiuti da D. Montino, *Le parole educate. Libri e quaderni tra Fascismo e Repubblica*, Milano, Selene Edizioni, 2005; Id., *Libri e giovani lettori tra XIX e XX: un percorso di tipo qualitativo*, «History of Education and Children's Literature», vol. II, n. 1, 2007, pp. 299-



testimonianza del processo dialogico attivato tra redazione e lettori bambini nella pubblicistica di primo Novecento. Si percepisce l'accorciamento della distanza asimmetrica tra adulto e bambino in virtù di una nuova reciprocità e complicità tra le parti attorno alla condivisione di medesimi orizzonti valoriali<sup>7</sup>. Così la voluta non correzione dell'errore ortografico da parte del giornale, l'acuto rilievo giovanile circa la mancata verosimiglianza di talune immagini e i velati consigli che denotano il desiderio di prendere parte attiva al ciclo produttivo della rivista, contribuiscono a rendere efficace e intensa la valenza comunicativa del piccolo Giovanni.

Nel profilo delineato ben si inserisce la nuova vivacità intellettuale giovanile verso la lettura. Nei cosiddetti anni d'oro nella promozione della lettura in Italia il giornalismo per i ragazzi consolida attorno a sé quel pubblico di bambini che nel corso dell'Ottocento aveva conquistato l'alfabeto e che insieme alle donne si distingue come nuova compagine di lettori<sup>8</sup>. I bambini scoprono sempre di più la lettura gratuita e piacevole coltivata nel tempo libero e, accanto agli autori classici, seguono e inseguono la produzione letteraria degli autori a loro contemporanei, tengono presenti i lanci editoriali sui periodici e alimentano la sete per nuove letture. Tale processo di vicinanza viva e dinamica con gli scrittori preferiti tramite il divenire dei giornalini mette in atto meccanismi di impaziente attesa del nuovo, di complicità e di insaziabile curiosità contribuendo ad allargare gli orizzonti di lettura dei ragazzi e a consolidare spazi di autonomia nelle scelte individuali sottratte agli orientamenti scolastici o anche più direttamente genitoriali<sup>9</sup>. In questo quadro di significati si inseriscono le parole di vero plauso per Salgari della già citata lettera di Giovanni a Ceralacca, alias Aldo Valori responsabile della «Corrispondenza»<sup>10</sup> del «Giornalino della

322. Ad essi si connette il più recente e sistematico lavoro sulle nuove linee storiografiche nello studio dei quaderni scolastici che offre ulteriori piste metodologiche di ricerca. Cfr. J. Meda, D. Montino, R. Sani (edd.), *School exercise books. A complex source for history of the approach to schooling and education in the 19<sup>th</sup> and 20<sup>th</sup> Centuries*, 2 voll., Firenze, Polistampa, 2011.

<sup>7</sup> Si ritiene che la scrittura tenda ad abbreviare lo scarto tra adulto e bambino grazie al ruolo di soppesata mediazione e controllo attribuibile alla parola. Invece la relazione educativa nel proprio svolgersi imprevedibile richiede maggiori capacità di gestione del coinvolgimento emotivo e responsabilità immediata nell'affrontare il dialogo e nell'orientare il percorso di crescita. La relazione mediata dalla parola presente nei periodici non mette certamente al riparo dai rischi di condizionamento adulto e di libertà simulata che l'apparente spontaneità può in realtà nascondere. Si veda Fava, *Piccoli lettori del Novecento. I bambini di Paola Carrara Lombroso sui giornali per ragazzi*, cit., pp. 28-45.

<sup>8</sup> M. Lyons, *I nuovi lettori del XIX secolo: donne, fanciulli, operai*, in G. Cavallo, R. Chartier (edd.), *Storia della lettura nel mondo occidentale*, Roma-Bari, Laterza, 1999, pp. 371-410.

<sup>9</sup> La presenza del romanzo a puntate nella pubblicistica per ragazzi si muove di fatto nell'orizzonte della costruzione di un legame privilegiato tra lettore e scrittore dagli indubbi risvolti educativi.

<sup>10</sup> Aldo Valori firmerà la Corrispondenza con lo pseudonimo di Ceralacca in maniera assidua fino all'aprile del 1908 quando l'assunzione della direzione del periodico «Il Collodi» allenterà la collaborazione al «Giornalino della Domenica» (e la «Corrispondenza» sarà assunta da Vamba) fino ad interromperla definitivamente nel dicembre 1909 e a determinare un contenzioso con Luigi Bertelli. Cfr. A. Valori, *Memoria della causa fra «Il Giornalino della Domenica» e il periodico «Il*

Domenica» ed esse trovano conferma in molte altre richieste di fedeli lettori del «Giornalino» che difatti inducono la direzione del settimanale a pubblicare la seguente comunicazione:

Cedendo alle innumerevoli, continue richieste dei piccoli fanatici ammiratori dei romanzi di avventure del cap. Emilio Salgari, abbiamo deciso d'anticipare la pubblicazione del Corsaro Rosso, le cui prime puntate usciranno nel prossimo novembre. Il «Giornalino della Domenica» è lieto di dare così ai suoi lettori una notizia da lungo tempo desiderata e attesa<sup>11</sup>.

### 1. *Salgari conteso*

Il 1906 segna il passaggio di Salgari dall'editore Donath a Bemporad, editore del «Giornalino della Domenica» e tale cambiamento si concretizzò subito con la pubblicazione di quattro «bozzettini marinareschi»<sup>12</sup> e con l'atteso *Il Figlio del Corsaro Rosso* che sarebbe uscito a dispense inserite nel settimanale a partire dal 16 dicembre 1906 e che avrebbe coperto quasi un anno di puntate poiché si concluse nel settembre del 1907<sup>13</sup>. Negli anni seguenti i «fanatici ammiratori» di Salgari poterono saziare la loro sete di avventura sul «Giornalino della Domenica» anche con *Le riconquista di Mompracem*<sup>14</sup> e con *I corsari delle Bermude*<sup>15</sup>. A ciò si aggiunge che la rivista ospitò frequenti pubblicità relative ai lanci d'uscita dei libri del Capitano per Bemporad che, con un contratto assai favorevole a sé, si assicurò la cessione di tre racconti all'anno almeno fino alla tragica morte dello scrittore<sup>16</sup>. Così i fedeli abbonati erano a conoscenza di nuovi successi narrativi come *Le meraviglie del Duemila* (1907), *Il tesoro della montagna azzurra* (1907), *La riconquista del Mompracem* (1908), *La scotennatrice* (1909), *La Bohème italiana* (1909), *Il leone di Damasco* (1910), *I*

*Collodi» innanzi al tribunale di Firenze*, Firenze, Spinelli & C., 1909; Pallottino (ed.), *L'irripetibile stagione de «Il Giornalino della Domenica»*, cit., pp. 23-24.

<sup>11</sup> «Il Giornalino della Domenica», n. 16, 7 ottobre 1906, p. 14.

<sup>12</sup> Si veda a tal proposito la recente ricostruzione del passaggio editoriale da Donath a Bemporad in S. Gonzato, *La tempestosa vita di capitano Salgari*, Vicenza, Neri Pozza, 2011, pp. 159 ss. I quattro racconti marinareschi così definiti da Salgari in una lettera a Vamba erano: *Il calcio al Pesceccane*, «Il Giornalino della Domenica», n. 7, 5 agosto 1906; *Re David primo*, n. 19, 28 ottobre 1906; *Il pazzo del faro*, n. 22, 18 novembre 1906; *Mastro Cannone*, n. 25, 9 dicembre 1906, cfr. Ascenzi, Di Felice, Tumino (edd.), «Santa Giovinazza!». *Lettere di Luigi Bertelli e dei suoi corrispondenti (1883-1920)*, cit., pp. 346-347.

<sup>13</sup> *Ibid.*, p. 347.

<sup>14</sup> E. Salgari, *La riconquista di Mompracem*, «Il Giornalino della Domenica», n. 51, 22 dicembre 1907 e n. 52, 27 dicembre 1908.

<sup>15</sup> *Id.*, *I Corsari delle Bermude*, «Il Giornalino della Domenica», dal n. 2, 10 gennaio 1909, al n. 43, 23 ottobre 1910.

<sup>16</sup> Sulla vicenda dei contratti sottoscritti con Bemporad si rinvia a Gonzato, *La tempestosa vita di capitano Salgari*, cit., pp. 160 ss.

*briganti del Riff* (1911) che andavano ad accrescere il già assai ampio ventaglio dei migliori successi degli anni precedenti<sup>17</sup>.

Il novero di appassionati lettori di Salgari va ben oltre i confini dei fedeli seguaci del «Giornalino della Domenica» che costituiscono pur sempre un pubblico elitario, ma interessa più ampi gruppi di lettori anche di estrazione popolare e frequentatori delle biblioteche popolari. Specie in area milanese esse vedono un periodo di sviluppo proprio ai primi del Novecento grazie alla Società Umanitaria e al lavoro di Ettore Fabietti e parallelamente grazie all'impulso dato dal Cardinal Ferrari alle biblioteche circolanti cattoliche<sup>18</sup>. Anche allo scopo di monitorare queste iniziative, proprio nel 1906 vengono resi noti i risultati dell'inchiesta *I libri più letti dal popolo italiano*<sup>19</sup> che costituiscono un documento di grande interesse per cogliere gusti e abitudini di lettura al principio del Novecento. Circoscrivendo le risultanze a Salgari, l'autore riscuote il successo trasversale di lettori adulti (di estrazione operaia e impiegatizia) e di giovani. Tra questi ultimi si osserva una specificità del genere maschile e una maggiore propensione tra i lettori inferiori ai 15 anni di età rispetto ai più grandi, i quali più equamente suddividono le loro preferenze anche tra «Stecchetti, Carducci, Negri, Manzoni»<sup>20</sup>. La lettura di Salgari pare soppiantare addirittura l'assai blasonato Verne se si prendono in esame i dati relativi a un'altra parte dell'inchiesta volta a esplorare la tipologia di libri acquistati dal popolo italiano. In questo caso lo spoglio mostra che le preferenze accordate a Salgari dai ragazzi inferiori ai 15 anni superano sia l'apprezzato De Amicis sia

<sup>17</sup> *Ibid.*, pp. 241-243.

<sup>18</sup> Su questo tema si rinvia a S. Fava, *La letteratura per l'infanzia tra fine Ottocento e Grande Guerra: un terreno di contesa o di conciliazione tra laici e cattolici?*, «History of Education and Children's Literature», vol. VI, n. 2, 2011, pp. 203-228.

<sup>19</sup> Cfr. G. Fumagalli, *I libri più letti dal popolo italiano*, Milano, Società bibliografica italiana, 1906.

<sup>20</sup> Su 1900 schede di lettori adulti che avevano preso in prestito volumi dalle biblioteche popolari milanesi nel 1905, Ettore Fabietti che ne aveva curato lo spoglio, registrava che 37 impiegati leggevano Salgari. Su un totale di 50 schede tra studenti inferiori ai 15 anni, si registrano 43 preferenze per le opere di Salgari prese a prestito almeno 20 volte; tra le schede di 50 studenti superiori ai 15 anni, Salgari compare insieme a Stecchetti, Carducci, Negri, Manzoni. Cfr. *ibid.*, p. 22. Nelle biblioteche popolari milanesi nel 1905 su 2000 schede registrate di opere date a prestito in lettura a diverse categorie e rispettivamente a operai, impiegati studenti inferiori ai 15 anni e studenti superiori ai 15 anni, risulta che Salgari è stato letto da 340 lettori per 20 volte (Verne lo precede con 914 preferenze). Le opere più lette da tutte le categorie di lettori sono: *I pirati della Malesia* (840 operai, 40 impiegati, 80 studenti inferiori ai 15 anni, 40 studenti superiori ai 15 anni) *La costa d'avorio* (540 operai, 100 impiegati, 100 studenti inferiori ai 15 anni, meno di 20 volte letto da studenti superiori ai 15 anni), *La favorita del Mahdi* (320 operai, meno di 20 volte letto da impiegati, 80 studenti inferiori ai 15 anni, meno di 20 volte letto da studenti superiori ai 15 anni), *La scimitarra di Buddha* (400 operai, 60 impiegati, 80 studenti inferiori ai 15 anni, 20 studenti superiori ai 15 anni), *Il continente misterioso* (400 operai, 120 impiegati, 80 studenti inferiori ai 15 anni, meno di 20 volte letto da studenti superiori ai 15 anni), *I predoni del Sahara* (280 operai, 20 impiegati, 80 studenti inferiori ai 15 anni, 20 studenti superiori ai 15 anni). Lo stesso orientamento si registra nelle biblioteche cattoliche. *Ibid.*, pp. 26-33.

Verne<sup>21</sup> e il dato risulta confermato in relazione ai lettori adulti appartenenti alla classe operaia<sup>22</sup> ipotizzando anche una lettura plurima degli stessi autori nel contesto familiare con significativi scambi tra adulti e bambini. L'inchiesta evidenzia inoltre che, nell'arco temporale citato, Salgari risulta predominante tra i maschi rispetto alle femmine:

Interessanti sono le osservazioni di indole generale sulla differenza di gusti dei bambini e delle bambine. I bambini leggono assai più delle bambine perché queste vengono presto applicate alle faccende domestiche. Mentre le piccole lettrici amano i racconti delle fate e in genere la letteratura fantastica, i piccoli lettori amano i racconti di viaggi, di battaglie, di conquiste, di avventure. In questo momento il loro autore preferito è Salgari, e la schiera dei suoi imitatori i quali trovarono accesso anche nelle biblioteche clericali soppiantando il Verne<sup>23</sup>.

È altresì curioso che tra le opere maggiormente prese a prestito nelle biblioteche non figurino *Il corsaro nero*, ritenuto dai più il miglior successo salgariano, mentre accanto al celebre *I pirati della Malesia* figurino romanzi non ugualmente noti come *La costa d'avorio*, *La favorita del Mahdi*, *La scimitarra di Buddha*, *Il continente misterioso*, *I predoni del Sahara*.

Lo spaccato dei lettori di Salgari fin qui descritto consente di osservare che al principio del '900 le sue opere e più comunemente il genere avventuroso è molto frequentato dagli adolescenti come lettura di intrattenimento, sganciata da finalità strettamente istruttive e coltivata per lo più in ambito extrascolastico, lasciata dunque alla libera iniziativa del singolo e influenzata dal passaparola curioso dei coetanei, dalla possibilità di accedere a biblioteche circolanti e dal potere informativo della pubblicistica come dimostrano le lettere degli abbonati al «Giornalino della Domenica». Di queste abitudini di lettura si possiedono riscontri anche dalla viva voce degli insegnanti più illuminati che si accorgono dei cambiamenti in atto, e dal loro specifico osservatorio scolastico offrono riflessioni acute anche sul fenomeno salgariano. Negli stessi anni dell'inchiesta milanese orientata a tratteggiare le abitudini di lettura del popolo, si situa l'esperienza magistrale sviluppata da Giovanni Cerri, un maestro milanese di scuola elementare maschile urbana, il quale registra dal 1906 al 1909 le inclinazioni di lettura di 132 scolari di V e VI ricavando da tale campione di indagine sperimentale una base di dati volta ad elaborare linee guida di carattere epistemologico sulla letteratura per l'infanzia. L'insegnante descrive

<sup>21</sup> In riferimento ai libri acquistati, non sono dettagliati i titoli delle opere ma in maniera globale sono indicati gli autori maggiormente scelti. Pertanto il numero delle schede dei ragazzi inferiori ai 15 anni, registrata nel numero di 30, non corrisponde al numero di preferenze accordate per autore, facendo capire che in ciascuna scheda il bambino lettore ha potuto indicare più opere di un medesimo scrittore. Se ne ricava il seguente quadro: a Salgari sono attribuite 110 preferenze, contro le 43 accordate a De Amicis e 30 a Verne. *Ibid.*, p. 22.

<sup>22</sup> Tra gli operai su un totale di 205 schede si registrano 240 preferenze per Salgari, mentre 147 sono attribuite a De Amicis e 141 a Verne. In questo caso Salgari non è l'autore più scelto ma segue a E. Zola e a V. Hugo rispettivamente con 598 e 268 preferenze. *Ibid.*, p. 23.

<sup>23</sup> *Ibid.*, p. 12.

l'assenza di contenuti avventurosi nei testi scolastici in circolazione, mentre di avventura hanno sete le generazioni che incontra:

Di racconti di viaggi, d'avventure e di sport nessun brano trovasi nelle antologie che mi servirono per gli esperimenti: ma ebbi modo di constatare il grande trasporto che per essi sentono gli adolescenti, dalla maggior ricerca di certi volumi della bibliotechina scolastica, dagli acquisti e dagli scambi frequenti e, talvolta, furtivi di libri, di pubblicazioni e dispense, di giornalotti del genere. Ciò accade specialmente nelle classi quinta e sesta<sup>24</sup>.

Negli stessi anni Anna Errera, acuta e moderna studiosa di letteratura per l'infanzia, non ignora lo «straordinario» consenso riscosso dal Capitano tra i giovani e ravvisa sottilmente un cambiamento di gusto da parte del pubblico «stanco della sola realtà». Il bisogno di avventura è presto appagato anche dai soli titoli che offrono ai ragazzi «fremiti di curiosità»: *La montagna di luce*, *L'uomo di fuoco*, *I predoni del Sahara*, *Il Re dell'aria*, *Il tesoro della montagna azzurra*. È evidente un'attenzione critica non superficiale e corriva sullo scrittore, contrariamente a molte posizioni contemporanee<sup>25</sup>. È percepibile nell'Errera uno sguardo critico che si struttura attorno a categorie letterarie ed extraletterarie derivanti non marginalmente dal suo impegno nell'ambito della promozione della lettura a livello bibliotecario nel capoluogo milanese. Da ciò pare derivare una spontanea e moderna attenzione per i comportamenti di lettura dei ragazzi prima ancora di voler rintracciare elementi di qualità nelle opere salgariane. Anzi, a partire dal gusto espresso dal pubblico, si indirizza a rintracciare inespressi elementi di possibile attrazione a livello testuale.

Al principio del Novecento il fenomeno di consenso ottenuto dal Capitano tra i ragazzi non passa dunque inosservato da parte di critici attenti ma ancora timidamente in bilico tra la curiosità di capire le ragioni non banali e squalificabili di tale successo e l'ancoraggio a più rigide categorie critico-interpretative di qualità estetico-formale e di valori etico-educativi. In questo sbilanciamento si scorgono nuovi scenari di attenzione al lettore e ai suoi gusti non ancora tuttavia supportati da un'adeguata strumentazione di analisi critica e quindi di fronte ai cauti orizzonti non strutturati si impone una linea più tradizionale di sostanziale rifiuto dell'opera salgariana.

<sup>24</sup> G. Cerri, *Le predilezioni letterarie degli adolescenti e la letteratura scolastica elementare*, Milano, Bemporad, 1911, pp. 86-87.

<sup>25</sup> A. Errera, *Le letture per i ragazzi in Italia. Relazione presentata al Primo congresso femminile in Roma, 1908*, poi in «Corriere delle maestre», Vallardi, 1908, pp. 14-15.

## 2. *Salgari rifiutato e strumentalizzato*

Lo stesso maestro Cerri ravvisa nella produzione di Salgari, e più in genere nel romanzo d'avventura, il rischio per il lettore di confondere reale e fantastico, bene e male e dunque l'insegnante sottolinea le probabili ripercussioni negative che questi testi possono avere sulla formazione del senso morale giovanile.

Ma questa inclinazione, nei tipi nervosi ed immaginativi, dev'essere frenata in tempo e tenuta entro buoni e giusti limiti, perché assume sovente una forma morbosa, che sconvolge il senso della realtà e forma dei piccoli Don Chisciotte, che tutto ingrandiscono e vedono attraverso il prisma dell'avventura. Parecchie volte dovetti nella scuola usar tutta la mia influenza e chieder perfino l'intervento coercitivo dei genitori per certi innamorati del Salgari o, peggio, per gli accaniti lettori di certi romanzi polizieschi americani, venduti a dispense, i quali attirando le simpatie dei giovinetti su le avventure di malfattori o di poliziotti, attutivano o guastavano in essi il senso morale. Meno pericolosi per i ragazzi sono i racconti puramente fantastici, agili e correnti come la loro immaginazione: ma anche per questi occorre tenersi lontani dalle esagerazioni. Onde non allontanar troppo le menti dal reale<sup>26</sup>.

Il distacco dal reale e il rifugio utopico nel fantastico sono avvertiti al principio del Novecento come pericoli per la crescita dei ragazzi. In questo si colgono le conseguenze di un retaggio culturale italiano ottocentesco più facilmente orientato all'accoglienza del romanzo storico e della scrittura verista e molto meno incline a misurarsi con la scrittura fantastica. Infatti la polisemia simbolica di molti contenuti è vissuta come potenzialmente destabilizzante nel prospettare una pluralità di significati la cui decifrazione è spesso lasciata all'autonomia del singolo senza un orientamento più esplicito nel testo. Non meraviglia infatti che le *Novelle* di Andersen inizino a circolare più ampiamente in Italia a partire dal 1904 con la traduzione di Maria Pezzé Pascolato e che invece negli stessi anni *Cuore* di De Amicis godesse del plauso della critica, degli educatori e del consenso degli studenti.

Letture come *Cuore*, saldamente costruite attorno a realtà e a sentimento, erano per questo molto più rassicuranti per gli educatori rispetto alla passionalità per l'esotico, il misterioso e l'imprevisto di tanta produzione salgariana. Di tali timori si tinge infatti la riflessione offerta da Maria Bersani negli anni Venti:

È [...] necessario educare la fantasia anche a scapito del sentimento, del criterio, del buon gusto? Il fanciullo, incomposto groviglio di nascenti energie, ama la lotta, tutto ciò che lo porta a uscir di sé, a cimentarsi col mondo ignoto pieno di fascino; onde viaggi, le avventure ricche di eroico, di impreveduto lo appassionano ... ed ecco dilagare il romanzo avventuroso.

<sup>26</sup> Cerri, *Le predilezioni letterarie degli adolescenti e la letteratura scolastica elementare*, cit., p. 87. Lo studio sperimentale è stato effettuato negli anni 1906-1909 nelle classi V e VI scuola elementare Leopardi di Milano su un totale di 132 alunni.

Ma quante di queste opere assolvono il loro compito? Gran parte sono indigesti miscugli di passione, di volgarità, di violenza; qua e là un'infarinatura scientifica, qualche descrizione di paese: raro si incontra un'opera solidamente costruita, che dia utili cognizioni alla mente e apra allo spirito più larghi orizzonti di vita<sup>27</sup>.

Maria Bersani ritornò a parlare più diffusamente su Salgari nel suo celebre catalogo degli anni Trenta nel quale prese le distanze sia dai detrattori circa il presunto ruolo «antieducativo» e di scarsa qualità letteraria dell'opera salgariana, sia dalla diffusa opinione che egli fosse il «Verne italiano». La linea assunta è misurata e la distanza ormai ventennale dalla scomparsa dello scrittore veronese aiuta a prospettare una posizione meno intransigente e più comprensiva dell'interesse giovanile. Maria Bersani sollecita infatti la reale conoscenza adulta di tutta la produzione dello scrittore al fine di trascogliere i romanzi veramente «sani e piacevoli» per orientare le letture giovanili<sup>28</sup>.

Una linea intransigente nei riguardi dell'opera salgariana è assunta nel tempo da Emilia Formigginì Santamaria il cui pensiero educativo, fondato sulla rettitudine morale veicolata dal testo e sulla qualità formale dell'opera letteraria, non concede deroghe rispetto al gusto del lettore che va affinato e sorretto orientandone le scelte. Infatti nel 1921 a proposito de *I naufraghi dell'Hansa*, evidenziando che «di frequente l'inverosimile e l'illogico piace di più dell'invenzione frenata da desiderio di verosimiglianza» esorta gli educatori ad operare una «severa e accurata scelta dei libri, i quali possono tanto facilmente indirizzare male il gusto e indurre a trasandare la forma»<sup>29</sup>.

Nel 1931, in occasione del cenno critico a *I cannibali dell'Oceano Pacifico*, E. Santamaria non manca di deplorare la «brutale malvagità» sterile ed eccessiva di contenuti cruenti e non protettivi dell'infanzia e la mancanza di sguardo d'insieme, di controllo e di autocritica complessiva.

Se gli scritti pubblicati dal popolare A. [utore] durante la sua vita avevano i colossali difetti che tutti sappiamo, questi altri, compilati su trame lasciate da lui, conservando tutte le deficienze inerenti al suo modo di concepire e di attuare il romanzo, aggiungono quella molto grave di una mancanza di sguardo d'insieme, di un controllo di autocritica complessiva, che pure in un certo senso l'A. avrà avuto. In questa storia di un fantastico ragazzo passato da mozzo a capitano durante lo stesso primo viaggio, improvvisatosi straordinario divinatorio di tempeste e di mezzi adeguati per sostenerle, combattente, perfino perfetto interprete dalla mai intesa lingua dei cannibali, il nucleo del racconto è una continua ecatombe di marinai e di selvaggi, condita dalle gesta di due marinai che compiono atti di indisciplina, furti, delitti per quel solo motivo che nel linguaggio delle cronache nere si chiama «brutale malvagità»<sup>30</sup>.

<sup>27</sup> M. Bersani, *La biblioteca dei fanciulli. Note e catalogo ragionato*, Federazione italiana delle biblioteche popolari, Milano, s.d., p. 7. Nel catalogo Salgari viene menzionato solo in riferimento a *Notizie della «Stella Polare» previsto per i corsi popolari e medie inferiori*.

<sup>28</sup> Id., *Libri per fanciulli e per giovinetti*, Torino, Paravia, 1930, p. 157.

<sup>29</sup> E. Formigginì Santamaria, recensione a E. Salgari, *I naufraghi dell'Hansa*, «L'Italia che scrive», n. 8, 1921, p. 162.

<sup>30</sup> Id., *I cannibali dell'Oceano Pacifico*, «L'Italia che scrive», n. 6, 1931, p. 174.

Di ben altro tenore è invece la posizione assunta da Olga Visentini negli anni Trenta. In *Libri e ragazzi* del 1933 l'autrice riconosce a Salgari la necessità vitale della scrittura come donazione di sé nella quale egli solamente riusciva a trovare appagamento e pace interiore. In questo senso Salgari ebbe molto forte «la febbre del poeta» che lo portava ad esaltare l'avventura e a intercettare la complicità dei ragazzi, ma non possedeva un altrettanto accentuato controllo formale della scrittura<sup>31</sup>. Negli anni Venti e Trenta si assiste a posizioni critiche più possibiliste verso l'opera salgariana in nome dell'esaltazione dell'audacia, della passione per l'ignoto e del coraggio, veri e propri valori modello per il regime. Il condizionamento esterno adegua la proposta educativa all'ideologia attraverso un utilizzo strumentale del piacere per la lettura espresso dai ragazzi. In questa direzione si muove la riflessione articolata di Giuseppe Fanciulli che pur affermando che «gran parte della produzione salgariana è rappresentata da romanzi scadentissimi: opere frettolosamente ricalcate sui primi modelli, [...] racconti scuciti, pieni di strafalcioni, redatti in pessima lingua»<sup>32</sup>, riconosce che «qualche cosa resterà a giustificare l'entusiasmo di innumerevoli lettori» e con assoluta acutezza rintraccia i semi di una dimensione artistica dell'autore nella «tecnica cinematografica del racconto»<sup>33</sup>. Fanciulli dunque identifica in Salgari una tecnica di scrittura che precede l'invenzione del cinematografo. Nel momento però che incentra la propria riflessione nell'offrire motivazioni educative si coglie il sopravvento del condizionamento ideologico. «Siccome [l'arte] si risolve in propaganda del coraggio fino alla temerarietà, dell'ingegno fino alla scaltrezza, della volontà fino all'ostinazione, contiene anche, [...] qualche efficacia educativa»<sup>34</sup>.

<sup>31</sup> «Salgari non è un imitatore del Verne, non è un romanziere di professione, non è un diseducatore: per queste tre cose occorre una coscienza volitiva ben lontana dal suo temperamento. [...] Non scrive romanzi su romanzi perché la pubblicazione gli giovi o la nomea lo attiri: tutti sanno della sua miseria e della morte tristissima; Salgari scrive perché gli è necessario, come respirare, muoversi, cibarsi: è in lui un fatto naturale. [...] e' un fantastico in continua esaltazione: vede le cose e le creature non come sono, ma animate dalla sua stessa inquietudine, desiderose come lui dell'ignoto appassionante; e se il calore che viene dal trionfo e dall'affetto, è per lui, povero viandante, sogno irraggiungibile, egli lo dona, dopo la lotta, alle sue creature e in questo dono ha tregua il suo cuore d'uomo. [...] Per questo il Salgari è letto appassionatamente dai ragazzi: ma da questo nascono i difetti salgariani, di cui il più grave è il fosco color di sangue che tinge qua e là le avventure. Crudeltà selvagge in dissonanza con le complesse civiltà storiche da cui è passato il mondo. Altro difetto, logicamente connesso alla natura dello scrittore, è la mancanza d'una costruzione: egli insegue la vicenda appena sprigionata dalla fantasia, senza averla meditata, e la vive torbidamente. [...] Emilio Salgari ebbe del poeta solo la febbre: ma la febbre fu perenne e gli tolse col fren dell'arte anche la coscienza suprema della creazione, onde quell'incalzar di fatti espressi in uno stile duro, disadorno, a volte convulso o contorto, non costruiti, a incubo come nel sogno. In lui fu continua l'esaltazione avventurosa che negli adolescenti è transitoria: ma in quell'esaltazione c'è un vigore che non va trascurato». Cfr. O. Visentini, *Libri e ragazzi*, Milano, Mondadori, 1933, pp. 160-161.

<sup>32</sup> G. Fanciulli, E. Monaci Guidotti, *Le letterature per l'infanzia*, Torino, Sei, 1926, p. 269.

<sup>33</sup> *Ibid.*

<sup>34</sup> *Ibid.*, p. 270.



La via seguita da Fanciulli per riabilitare Salgari consiste nel saldare abilmente il versante dell'innegabile ricezione giovanile con la modernità della tecnica narrativa e nel porle al servizio dell'efficacia educativa, del coraggio e dell'audacia assunti come dimensioni centrali nella formazione dell'uomo fascista. Sulla medesima linea si pongono non casualmente le riflessioni di Pia Addoli e di Armando Michieli i quali avevano in passato condiviso con Fanciulli l'esperienza giornalesca e all'altezza degli anni Trenta ne seguono l'orientamento senza grandi guizzi di autonomia critico-interpretativa. Pia Addoli infatti, che negli anni di direzione di Fanciulli al «Giornalino della Domenica» aveva tenuto una rubrica di critica sulla letteratura per l'infanzia firmandosi con lo pseudonimo Allodola, riprende da Fanciulli la lungimirante intuizione del linguaggio cinematografico salgariano:

Il Salgari non si propose mai intenti educativi o istruttivi: egli amava l'avventura, e i suoi libri venivano così, con uno stile che direi quasi cinematografico, scorrenti rapidamente come un fiume in piena, che porta con sé, con la mirabile forza delle sue acque, anche tutte le scorie e il fango che incontra nel suo passaggio<sup>35</sup>. Per quanto riguarda Armando Michieli, pur rilevando un'eccessiva ed esuberante fantasia, riconosce alle opere dello scrittore veronese la cifra distintiva dell'efficacia educativa piegata tuttavia entro un quadro di retorica acquiescenza all'ideologia dominante:

I personaggi del mondo salariano sono eroi di ferrea volontà, sprezzanti del pericolo, audacissimi, scaltri, hanno le doti degli esploratori. I romanzi del Salgari furono pubblicati nel tempo più triste dell'Italia unita, nel periodo della politica della porta di casa, e significano reazione al quietismo e al pacifismo. E sono senza confronto migliori di quelle avventure poliziesche che dall'America in dispense vennero ad ingombrare e a danneggiare l'anima dei fanciulli italiani<sup>36</sup>.

### 3. *Alla ricerca dei motivi della diversa accoglienza*

Lo scarto tra Salgari conteso dai giovani lettori avidi di avventure rocambolesche e il rifiuto da parte della critica di primo Novecento può essere ricompreso a partire dai testi salgariani alla luce delle attuali possibilità critico-interpretative. Salgari è moderno perché nell'autonomia delle proprie opere è riuscito spontaneamente a dare vita a una cooperazione di particolare intensità con il lettore. I romanzi salgariani custodiscono scelte di contenuto e tecniche narrative che sono alla base del piacere di lettura riscontrato e del rapporto cooperativo tra autore, testo e lettore. Un primo aspetto può essere

<sup>35</sup> P. Addoli, *Libri per ragazzi*, «La Parola e il libro», nn. 9-10, 1931, pp. 503-504.

<sup>36</sup> A. Michieli, *Breve storia della letteratura per l'infanzia e la fanciullezza*, Padova, Cedam, 1937, pp. 49-50.

sinteticamente riassunto nella «verosimiglianza dell'impossibile». Le narrazioni salgariane rispondono alla ricerca di esotico, di viaggio e di superamento dei confini della realtà quotidiana vissuta dall'uomo nel passaggio tra i due secoli. Un desiderio di viaggio che fino ai primi decenni del Novecento rimane ampiamente insoddisfatto per la classe media e per quella popolare, carenti di mezzi e di tempo libero<sup>37</sup>. Gli intrecci narrativi appagano tale bisogno perché, nel forgiare un mondo impossibile, l'autore si basa su riferimenti narratologici verosimili. Ernesto Ferrero nota che Salgari, accanto a un indiscusso «talento affabulatorio» e a una straordinaria immaginazione, possedeva una «pazienza artigiana» e notevole «scrupolo documentario»<sup>38</sup>. Se è vero che i luoghi descritti nelle sue opere, nonostante le diverse affermazioni iperboliche di Salgari, non erano stati visitati da lui di persona ma solo nella mente, è pur vero che i romanzi non nascevano dal nulla ma sulla base di un lavoro meticoloso di raccolta e di archiviazione di fogli di viaggio pubblicati su giornali e riviste, documenti rintracciati nelle biblioteche, documenti cartografici e di una svariata selezione di informazioni che andarono a costituire un ordinato archivio enciclopedico personale al quale di volta in volta l'autore attingeva per rappresentare in modo veritiero e inappuntabile il mondo impossibile dei suoi romanzi<sup>39</sup>. Infatti come poeticamente dice Ferrero «per viaggiare su barche di carta costruite in quell'arsenale dei folli che sono le biblioteche [...] bisogna avere un talento, una pazienza, una rabbia che non ce l'ha nemmeno Yanez»<sup>40</sup>. Per questi motivi le descrizioni geografiche, i riferimenti puntuali ad animali, ad usi e costumi di paesi lontani non corrono rischi didascalici ma fanno parte di una precisa strategia retorica pregna di emozioni forti e volta a suscitare nel lettore un preciso stato d'animo di compartecipazione alla situazione narrata<sup>41</sup>. Sotto questo profilo la lontananza da Verne è evidente.

Alla lentezza narrativa, dovuta a scavo psicologico e a minuziose descrizioni scientifiche, si sostituisce la suggestione d'insieme, sincretica fusione di dati conoscitivi all'interno dell'incalzare rapido dell'azione narrativa. Ciò risponde all'animo del bambino lettore, immerso nei cambiamenti, nel progresso tecnologico di fine secolo e già significativamente orientato a respirare i segni delle avanguardie futuriste che erigono a simbolo la velocità in tutte le espressioni artistiche.

<sup>37</sup> P. Corvo, *I mondi nella valigia. Introduzione alla sociologia del turismo*, Milano, Vita e Pensiero, 2003 ripreso da F. Forchetti, *L'ipertrofia dei mondi reali e il piacere dei mondi possibili*, in A. Rondini (ed.), *Emilio Salgari: un'avventura lunga cent'anni*, «Rivista di letteratura italiana», vol. 29, nn. 2-3 (numero monografico), 2011, p. 209.

<sup>38</sup> E. Ferrero, *Agenda del viaggiatore 2003*, Torino, Edit, 2003, ripreso da Forchetti, *L'ipertrofia dei mondi reali e il piacere dei mondi possibili*, cit., p. 206.

<sup>39</sup> G. Arpino, R. Antonetto, *Vita, tempeste, sciagure di Salgari il padre degli eroi*, Milano, Rizzoli, 1982, p. 87.

<sup>40</sup> E. Ferrero, *Disegnare il vento*, Torino, Einaudi, 2011, p. 134.

<sup>41</sup> A. Lawson Lucas, *La ricerca dell'ignoto. I romanzi d'avventura di Emilio Salgari*, Firenze, Olschki, 2000, pp. 32-33.

Da ciò discende «lo stupore dell'ignoto». Il lettore lo trova nelle opere più belle del Capitano e ai suoi occhi l'ignoto acquisisce una dignità di esistenza narrativa valida per se stessa proprio perché cesellata dalla parola e capace di evocare un ricordo vivido, a volte più nitido di un'esperienza di viaggio vissuta. Questo potere della parola scritta viene intercettato specialmente dal lettore giovanile, proteso in avanti, verso luoghi e tempi che non vive ancora ma verso i quali avverte curiosità e trasporto come condizioni del proprio percorso di crescita e della possibilità di sperimentare e ideare il nuovo.

Un altro tratto della scrittura salgariana, che efficacemente mostra la sovrapposizione tra tempo del narratore e tempo del lettore, riguarda la centralità di «suggestioni plurisensoriali». Il gioco narrativo del dire e non dire, del suggerire ma non spiegare, dell'uso di iperboli, del rinviare ad altri contenuti ma anche ad altri canali comunicativi, dona immediatezza ai testi e dilata il potere della parola coinvolgendo intuitivamente dati plurisensoriali. La scrittura visiva permette di condensare nelle parole «tutte le immagini possibili»<sup>42</sup> e non una figura soltanto. Le parole possono in questo senso generare nel lettore il processo di immaginazione e di fantasticazione. Ma la scrittura salgariana è anche suono, musicalità lieve e impetuosa, delicata e vibrante che provenivano all'autore dalla sua familiarità con il mondo della musica e dell'opera in particolare. Amava la musica e il teatro svolgendo per una parte della vita anche l'attività di cronista e critico teatrale per «La Nuova Arena»<sup>43</sup>. Non stupisce dunque che la voce della «Perla di Labuan» sia «argentina e melodiosa», e che il feroce pirata resti con il cuore sospeso e «gli orecchi tesi». Non mancano nei romanzi del Capitano odori, sapori e percezioni tattili che entrano a pieno titolo in una scrittura passionale e dove la fisicità dei personaggi è continuamente richiamata in un'eco di presenza materiale mista a suggestioni spesso contrapposte di profumi e odori nauseabondi, sapori di misteriosi frutti tropicali come il «durion» e altri assolutamente ripugnanti come ne *La Bohème italiana*.

Un altro aspetto di moderna cooperazione tra autore e lettore riguarda la *tecnica cinematografica* di scrittura già così efficacemente riconosciuta da Giuseppe Fanciulli nel 1926. I romanzi salgariani, basati sull'azione narrativa incalzante, suggestiva e, come si è detto, evocatrice di ignoto e avventura, costruiscono un'incredibile «macchina dei sogni»<sup>44</sup> ancor prima che la tecnica e il progresso dessero ai Fratelli Lumière modo di inventare il cinema. Salgari, vissuto nel periodo di successo del melodramma teatrale, utilizza uno stile narrativo visivo che anticipa il dinamismo cinematografico. E quando il cinema conquisterà il sonoro ben condenserà quei dati sensoriali così abilmente e modernamente evocati da tempo nella produzione dell'artista. Nella scrittura

<sup>42</sup> Ferrero, *Disegnare il vento*, cit., p. 86.

<sup>43</sup> C. Gallo, G. Bonomi, *Emilio Salgari e la macchina dei sogni*, Milano, Rizzoli, 2011, pp. 46-58.

<sup>44</sup> Felice espressione adoperata nel titolo del sopra citato volume di Gallo e Bonomi.

di Salgari si può dunque dire che la complicità con il lettore giovanile a cavallo tra i due secoli sia compiuta. L'autore interpreta segni del progresso e sogni dei lettori. Anticipa alcuni bisogni e interpella nuovamente lettori curiosi che rispondono favorevolmente con un legame di fidelizzazione sempre più intenso. Salgari concorre a mettere in moto l'industria dell'intrattenimento nella quale anche il bambino non è solo fruitore ma partecipa in modo attivo esprimendo scelte, punti di vista e affermando così orientamenti di lettura che travalicano di fatto le riflessioni della critica. La diversità di prospettiva tra i ragazzi e i critici non è solo il frutto di un normale scarto generazionale, ma molto di più dipende dall'inconciliabilità tra una emergente logica dell'intrattenimento rispetto alla logica educativa di tipo prescrittivo di derivazione liberale e tardo ottocentesca. Il modello di lettore orientato al dover essere non trova ancora modo di integrarsi appieno con il piacere del leggere e così quest'ultimo orizzonte viene coltivato quasi furtivamente e rimane sottratto al controllo adulto. La complicità che Salgari instaura, perlopiù inconsapevolmente, con il lettore giovanile esclude l'adulto nel ruolo di educatore. Mentre l'adulto è orientato a cogliere in via esclusiva il valore formale del testo secondo riferimenti estetici crociani, egli rischia di perdere di vista il differente rapporto e accordo tra gusto del lettore e opera letteraria che la via dell'intrattenimento narrativo andava generando anche tra le giovani generazioni. Giovanni, l'abbonato del «Giornalino della Domenica» e appassionato di Salgari come tanti suoi coetanei, interpreta in modo emblematico nel tono delle parole il cambiamento in atto. Il linguaggio è molto lontano da uno stile reverenziale e formale di deamicisiana memoria: è diretto, colloquiale e ironico, è espressione del bambino reale e spontaneo che lascia da parte convenevoli retorici. Tali canoni sarebbero entrati gradualmente a far parte della consuetudine di scrittura per l'infanzia e più stabili frutti si iniziano ad avere nella produzione del secondo dopoguerra, cioè a distanza di almeno quattro, cinque decenni rispetto al 1906 quando quel bambino di nome Giovanni scriveva la propria letterina e quando schiere di lettori bambini veleggiavano tra le pagine del Capitano.

# On the liminality of the picturebook: the case of mix-and-match books

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**ABSTRACT:** The aim of this paper is to carry out a theoretical analysis of different picturebook types as well as other similar publications such as pop-up books and lift-the-flap books. This includes taking a closer look at the recent publishing trends of mix-and-match books within the genre of publications which function as design objects and recent Portuguese children's literature in particular. Children's picturebooks have similarities with other publishing genres, such as toy books, and pop-up books. Lift-the-flap, flip-flap or touch-and-feel books are other publications which also function as objects, often comparable to a collectible item, imbued with unique characteristics, where physical manipulation and the interaction between the reader and the book are an essential part of the reading process. Mix-and-match books, which are very often hard cover books and targeted at pre-readers, are often created for the purposes of playfulness and limited to ludic manipulation, and have not been the focus of particular critical attention. They are usually characterized by the horizontal division of the page into sections, which allow a combination of the various flaps and the creation of multiple images. Some recent mix-and-match books have shown the potential to branch into other areas, diversifying and enriching the range of publications through the use of humor, parody and nonsense. They also increase the variety of possible interpretations through interaction, questioning and reflection, particularly with regard to gender issues. The fragmented nature of the genre, as well as its openness, as a result of the absence of text and implied narrative, both in physical and/or material terms, are other aspects to be taken into account when analyzing these publications, which alter the traditional act of turning the page as well as the reading process itself. Highlighting the hybrid, multimodal and chameleon-like nature of the picturebook, our objective is to contribute to a reflection on this genre of contemporary literature, which is in constant development and the target of increasingly more elaborate experimentation.

**EET/TEE KEYWORDS:** Picturebook; Children's literature; Gender studies; Portugal.

## Introduction

The classification of mix-and-match books is not an easy task. They are usually listed outside the field of literature and are associated with the toy or game book due to the fact that they require physical manipulation by and interaction with the reader. They have been published mainly as marketing tools such as merchandising associated with typified global images, particularly those related to well-known brand names such as Disney and Mattel. Contrary to numerous studies which have been carried out into similar children's books, such as the pop-up or the lift-the-flap books<sup>1</sup> there are very few specific studies related to these mix-and-match books<sup>2</sup>.

According to the classifications by Salisbury<sup>3</sup> or Van der Linden<sup>4</sup>, there is no explicit reference to this genre, which can be considered an example of an interactive book in the case of the former author, or an object book in the case of the latter. In his study, Martin Salisbury also focuses his attention on various types of non-narrative books into which these fit, however he never touches upon the theme of mix-and-match books in particular. Nevertheless, it is believed that some of his reflections on games and puzzles may be extended to the books under analysis here, due to their ludic nature, as well as the importance of the image and the physical characteristics of the books, which from a conceptual point of view are crucial to their construction<sup>5</sup>.

From a structural point of view, mix-and-match books are bound using the «binding of pages in which metal or plastic accessories slot together by means of perforations» (my translation)<sup>6</sup>. The most common of these is 'wire-o', in which a metallic or plastic spiral is inserted into perforations along the page margins. This method of bookbinding enables the book to be completely opened to create different combinations of various segments or flaps «without the restriction of division by traditional binding methods» (my translation)<sup>7</sup>. Higonnet<sup>8</sup> points to

<sup>1</sup> See V. Smith, *All in a Flap About Reading: Catherine Morland, Spot, and Mister Wolf*, «Children's Literature in Education», vol. 32, n. 3, 2001, pp. 225-236; B. Bellorín, 'Efectos especiales': el peso de los aspectos materiales del libro-álbum en adaptaciones actuales de 'Los três cerditos', in T. Colomer, B. Kümmerling-Meibauer, M.C. Silva-Díaz, (edd.), *Cruce de Miradas: nuevas aproximaciones al libro-álbum*, Caracas, Banco del Libro, 2010, pp. 74-86; L.B. Boyce, *Pop Into My Place: An Exploration of the Narrative and Physical Space in Jan Pienkowski's Haunted House*, «Children's Literature in Education», vol. 42, n. 3, 2011, pp. 243-255.

<sup>2</sup> With the exception of occasional references in articles, see R.-A.C. Do Rozario, *Consuming Books: Synergies of Materiality and Narrative in Picturebooks*, «Children's Literature», vol. 40, n. 1, 2012, pp. 151-166.

<sup>3</sup> M. Salisbury, *Ilustración de libros infantiles*, Barcelona, Editorial Acanto, 2005, pp. 86-87.

<sup>4</sup> S.V.D. Linden, *Lire l'album*, Le Puy-en-Velay, Atelier du poisson soluble, 2006, p. 24.

<sup>5</sup> Salisbury, *Ilustración de libros infantiles*, cit., pp. 116-117.

<sup>6</sup> E. Romani, *Design do Livro-Objeto Infantil*, Master's Thesis in Design and Architecture, Faculty of Architecture and Urban Planning, Brazil, University of São Paulo, 2011, p. 65.

<sup>7</sup> *Ibid.*

<sup>8</sup> M.R. Higonnet, *Narrative fractures and fragments*, «Children's Literature», vol. 15, n. 1,

the structure of mix-and-match book as one of the examples of the literal and even physical break in the field of children's literature.

With regard to the reading and interpretation of these publications, they challenge the reader because they become a co-creator of meaning through the virtually unrestricted and unlimited manipulation of the various combinations the book provides. The absence of a pre-determined narrative structure does not mean that one cannot be freely constructed by the reader, who can take full advantage of the prompts supplied by the text and/or images. In terms of design, the potential of these publications is evident, due to the exponential increase of their possible interpretations and readings, as a result of the multiple combinations of the various segments that make up the book. Its association with a ludic object, both in terms of text and of illustration, allows a more profound reading and examination of the book in terms of concept and structure, as well as its message and manipulation. On this theme, the publication by Raymond Queneau (1961) called *Cent mille milliards de poèmes* [A hundred thousand million poems], is a mix-and-match book where the reader creates a sonnet from a selection of 10 verses, thus allowing the formation of 100,000,000,000,000 possible poems. As an experimental object which is clearly targeted at exploring the possibilities and boundaries of the book, this publication is similar to those under analysis here, since it includes a physical, interactive, playful and experimental/laboratorial dimension, taking full advantage of the materials used in the book and how it is assembled. In this way, paratextual texts<sup>9</sup>, such as the format and binding of mix-and-match books, play a significant role in their construction and reading. The issue of playfulness as a means through which contemporary picturebooks are created is highlighted by Nikolajeva<sup>10</sup>, who focuses on the importance of the various elements of which they are composed, such as their format and size. She also states that the object book also reveals creative potential for contemporary aesthetics in exploring the playful nature stemming from its material and interactive appeal, thus altering the relationship between the reader and the book: «in postmodern aesthetics, the boundary between art and artifact becomes vague. A vast output of products nowadays lies in the borderline between books and toys, employing cuts-outs, flaps, and other purely material elements that add to the playful dynamics and demand a certain degree of interaction to engage the viewers and make them co-creators»<sup>11</sup>.

1987, pp. 37-54.

<sup>9</sup> M. Nikolajeva, C. Scott, *How Picturebooks Work*, New York, Garland Publishing, 2001, p. 256.

<sup>10</sup> M. Nikolajeva, *Play and playfulness in postmodern picturebooks*, in L.R. Sipe, S. Pantaleo (edd.), *Postmodern Picturebooks: play, parody, and self-referentiality*, New York, Routledge Research in Education, 2008, pp. 55-74 (citation p. 59).

<sup>11</sup> *Ibid.*, p. 67.

## Corpus *analysis*

The narrative dimension of mix-and-match books is not an explicitly structural element in their creation since they explore the juxtaposition of fragments of images (and sometimes texts or words). This allows their free arrangement among the numerous possible combinations from the exponential multiplication of the various segments as a result of the cuts across the pages. Within Portuguese literature, the pioneering work carried out by Manuela Bacelar in 1991 is worthy of mention, which includes a collection of books whose main character is Tobias, and whose fifth book, called *Tobias às fatias* [Tobias by the slice]<sup>12</sup>, is a mix-and-match book. It is similar to an activity book because some of the illustrations are in black and white and can be coloured in by its readers. It is a paperback and an interesting conceptual challenge due to the combinations it provides: characters which are humans, animals or objects, in a bold experimental publication which contains nonsense, fantasy and eccentric imagination.

There are some contemporary international publications which are noteworthy, but which are targeted at different readers, such as those by Pacovska<sup>13</sup>, Norman Messenger<sup>14</sup> or more recently Miguel Murugarren and Javier Sáez Castán<sup>15</sup> and Tullet<sup>16</sup>. The aim of these publications however is not the same as mix-and-match books and they do not ascribe to a playful dimension.

In the books under analysis in this study, all of which were published in Portugal in 2011, the experimental nature of the publications is clear from the outset, which is in keeping with the editorial philosophy of their respective publishing houses. One example is Pato Lógico, which was founded in 2010 by the illustrator André Letria. It is a small publishing house which has published various alternative designs. As well as the books being studied here, and two others which are more traditional in nature, its somewhat limited book list contains wordless foldout picturebooks (*Incómodo e Destino*) [Nuisance and Destiny], and an activity book about the sea. Some of the books published on paper, as is the case with those under analysis, are also available in digital reading applications. The publishing house has focused its energies on these applications, as well as on the organization of educational events and exhibitions of illustrations, with noticeable results in the internationalization of its book list. It is to an extent a project which sets itself apart from other

<sup>12</sup> M. Bacelar, *Tobias às fatias*, Porto, Porto Editora, 1991.

<sup>13</sup> K. Pacovska, *Midnight Play*, New York, North-South Books, 1994.

<sup>14</sup> N. Messenger, *Famous Faces*, New York, DK Publishing, 1995; Id., *Imagine*, Somerville, Candlewick, 2005.

<sup>15</sup> M. Murugarren, J. Sáez Castán, *Animalário universal do professor Revillod*, Lisboa, Orfeu Mini, 2009.

<sup>16</sup> H. Tullet, *O jogo das combinações*, Lisboa, Edicare, 2012.



Portuguese publications, centering its efforts on direct contact with the public and proposing activities where reading is mediated and culture is disseminated through books.

Another publishing house, Planeta Tangerina, has become both nationally and internationally consolidated, despite its relatively recent history (it has been in operation for less than a decade), as can be seen from the BOP award it won in 2013 in Bologna, for best European publishing house. It continues to innovate and experiment with new types of publications in Portugal and besides more traditional books, such as the narrative or even the poetic picturebook, it also publishes wordless books and books with various intersecting and/or parallel narratives.

The book by Madalena Matoso, *Todos fazemos tudo* [We all do everything]<sup>17</sup>, is a wordless mix-and-match book, with only one cut per page, dividing the page into two flaps. Each page contains an adult of a different age, gender and physical appearance, carrying out different professional and leisure activities in different settings. The turning of each flap allows the different characters, men and women and young and old, to randomly carry out all the activities in the book, from carpentry to taking care of children and from doing kitchen chores to sport. It was first published by the publishing house Éditions Notari in Geneva, where the author participated in a project whose objective was to increase pre-school children's awareness of issues of gender equality, regardless of nationality. The book won a competition organized by the publishing house in collaboration with the local authorities, which resulted in it being freely distributed to children attending nursery schools and kindergartens. In the case of this book, its playful nature is used to convey an interesting message of equality between the sexes, as well as recognizing different competences in people of diverse ages, appearances and origins. The publishing house's book list presents it as a «game» which is quite simple in terms of combinations or colours and shapes. The pages are divided into two, the top half identifying the characters and the bottom half the activity being carried out, allowing the free combination of all of them. Besides familiar contexts which contain texts on equality, such as work and the home, other contexts are constructed, including those associated with leisure activities, such as doing sports and going for walks, enjoying nature, going to cafés and playing musical instruments. The fact that children share the space and the activities with adults is another feature which is worthy of mention, particularly those where the children are carrying out the activity, representing them as agents or beneficiaries of the actions. There is also the inclusion of elements of surprise and humour associated with the turning of the page, resulting from the variety in the physiognomy of the characters, the range of activities throughout the thirty pages of the book and the brief

<sup>17</sup> M. Matoso, *Todos fazemos tudo*, Carcavelos, Planeta Tangerina, 2011.

texts<sup>18</sup> which enrich the scenes and their interpretation. The level of detail of each of the pages is impressive and the spaces and environments and moods and emotions are easily identified, creating potential micro-narratives and increasing the number of possible storylines. The presence of visual manifold narratives<sup>19</sup> is not a feature which is usually studied in this type of publication, but should not be overlooked due to the role of the reader in the construction of meaning.

As with all the books from this publishing house, some suggestions as to how the book can be explored are available online. The recommendations<sup>20</sup> aim to elicit dialogue, the deconstruction of stereotypes, prejudices and preconceived ideas about gender and gender specific activities, encouraging the child to take a closer look at the world around them and establish associations between the book and everyday life, so the they can identify with the scenes and be involved in the interpretation of the book.

In the case of the two books by the publishing house Pato Lógico, by José Jorge Letria and André Letria, the text and the illustrations are also segmented, this time using two cuts to create three flaps, so that the reader can freely combine the different images. In *Estrambólicos* [Strambolics]<sup>21</sup> the story revolves around the construction of a monster by combining three anatomical elements: head, body and upper limbs and lower limbs and hands. By resorting to different shapes, colours, fabrics and textures, it is possible to create surprisingly different characters connoted to monsters, but also humour due to the eccentricity which results from the different combinations. The title of the book links these two dimensions since the Portuguese version of the term «Strambolics» designates something strange or unconventional, weird, different or unique, suggesting something monster-like, but with an element of silliness, in the sense that it can be the butt of jokes or laughable even, reducing or deconstructing the scary nature of the creatures.

The theme of monsters, with a long tradition in children's literature, dates back to the origins of humanity and can be found in various forms throughout its history and culture in various art forms such as painting, sculpture, architecture and the cinema. For centuries monsters have provided Humankind with a stability which, contrary to what one may believe, results in the creation of boundaries of what people perceive as normal. They are frequently seen as a human creation, symbolizing fear, the unknown, the violation of laws, danger, threats, irrationality and the indomitable and so the magical projections of each

<sup>18</sup> For example, a child swinging from a tree or a saxophone player, some animals which witness the main narrative, different aspects of the landscape or objects which can be identified or counted.

<sup>19</sup> R.S. Trites, *Manifold Narratives: Metafiction and Ideology in Picture Books*, «Children's Literature in Education», vol. 25, n. 4, 1994, pp. 225-242.

<sup>20</sup> <[http://www.planetatangerina.com/sites/planetatangerina.com/files/prop\\_tft.pdf](http://www.planetatangerina.com/sites/planetatangerina.com/files/prop_tft.pdf)> (last accessed: September 7<sup>th</sup>, 2015).

<sup>21</sup> J.J. Letria, A. Letria, *Estrambólicos*, Lisboa, Pato Lógico, 2011.

of these concepts placates any anguish felt by humans. In children's literature, monsters represent fear, but also the ability to overcome that fear, symbolizing obstacles and challenges that heroes must overcome. They are demystified due to the regular contact children have with them, making the monster familiar to the child and in some cases, laughable, and therefore no longer scary. This parody, leading to humour, is one of the post-modern appropriations of this symbolic element. In the case of the book under analysis, the legacy inherent in the representations of monsters resonates in both the text and the illustrations.

The monsters are always characterized by how they differ from the «norm» either by excess or lack of body parts such as eyes, arms or legs. In relation to the «excess», the addition/multiplication of anatomical elements is used, combining body parts from different species or families, such as feathers, fur or scales. These characteristics are skillfully represented in illustrations, where elements are added to the sixteen basic monster models, which can then be enhanced by the reader using different combinations. The text which accompanies this exercise also provides an interesting experimental dimension. Each flap includes a syllable or part of a word which once combined with the other parts, will create new words which were non-existent up to that point and which can be used to define the newly created monsters. In this way, the reader not only constructs the «creature» but also «invents» its designation, transforming the child into a creator of monsters, an almost «omnipotent» inventor. Besides the new word, the combination of flaps allows the construction of a short accompanying text which results from the combination of the various segments. These texts describe the creatures in an almost scientific way, providing information about their habits, preferences, feeding habits, behaviours, and so on. They are presented in the form of short rhyming poems, most of them quatrains, and reinforce the playful nature of the book, proposing a lighthearted sometimes even comic interpretation of the characters, which is in perfect harmony with the non-threatening illustrations. The use of strong contrasting colours and well defined shapes, the rigid posture of the creatures and the expressive «faces» create an explicitly ludic reading experience, challenging the reader to play a combination game of “monstrous” and fun creations.

This humour is taken to another level in the book *De Caras*<sup>22</sup> which structurally resembles a diptych. It is similar to the previous book in that the text and image share centre stage, with text on the even numbered pages and the illustrations the odd numbers. Each page is divided into three flaps and revolves around the male face. Although it is not totally original<sup>23</sup> as a concept because the faces are split up into three parts; hair, eyes and nose and finally mouth and shoulders, it distinguishes itself through the texts, which create the characters' names, made up of two first names and one surname. The names are

<sup>22</sup> J.J. Letria, A. Letria, *De Caras*, Lisboa, Pato Lógico, 2011.

<sup>23</sup> See the books by Norman Messinger, for example.

accompanied by short descriptions about the habits, behaviours, likes, desires and dreams of the characters, allowing the construction of a personality through the different combinations of names and respective descriptions. All the names and surnames are typically Portuguese, most of which are uncommon and comical due to their uniqueness or their double meaning. Chouriço [Chorizo], Formiga [Ant], Vinagre [Vinegar], Paciência [Patience], Sardinha [Sardine] or Beringela [Aubergine] are some of the suggestive surnames of the characters, whose facial expressions also portray different moods, subtly recreated through such features as the shape of the mouth and eyes and the position of the eyebrows.

The human figures which result from the combination of different flaps recreate some stereotypical elements of Portuguese identity, which suggests a satirical reading of national habits and behaviours, such as the use of different moustaches and beards, sideburns and other clichés related to clothing and haircuts. Faces with distinct physiognomies are created, resulting in a multifaceted depiction of the Portuguese man of different ages, origins, statutes and social strata. Some of the combinations are explicit parodies of stereotypical images, such as a man with very hairy chest and shoulders wearing a sleeveless t-shirt, a toothless grin or the different hairstyles – or lack of hair as the case may be. As with *Estrambólicos* [Strambolics], depictions of the characters are presented, building micro-narratives through the combination of textual segments. Each character created by the reader has their own name, from a total of 4,096 possible names, an identity and a different personality, with preferences and ambitions, all in specific settings. Although they are very short, the texts are conceived in such a way that they make sense, creating brief biographies and conferring a human side to the characters through the preferences, idiosyncrasies, desires and expectations of each character, so that personal histories are implicitly suggested. They are somewhat caricatured, using a simple illustration technique (acrylic painting), and present a multifaceted perspective of Humankind, simultaneously highlighting the similarities and differences among all of us.

### *Conclusion*

According to Romani<sup>24</sup> the contemporary expansion of the book as an object for children, which has already been developed by schools and specific artistic movements, such as Concrete Art, owes much of its existence to the technological innovation introduced in the graphics industry, which allows for much experimentation. The ludic nature of these publications attracts readers, initially creating surprise and curiosity with the different objects, but

<sup>24</sup> Romani, *Design do Livro-Objeto Infantil*, cit., p. 135.

also through the manipulation and exploration of their multiple possibilities, very often resorting to repetition, which can in turn lead to re-readings and new discoveries<sup>25</sup>. The concept of novelty is one of the key elements of mix-and-match books, given the number of possible combinations created by the multiplication of the page segments. For Jean Perrot, books which enable game playing can be classified as one of the following: synesthetic games, humouristic games, guessing games, picture games and cutout games. In the case of the books under analysis, they are clearly similar to cutout games, but the publications by José Jorge and André Letria also explore a more humouristic aspect through nonsense and parody, which is essential for the reading process. In the book by Madalena Matoso, the picture game is important because of the lack of text, and it is through the images that the child can decipher the message in the book. These books are challenging, original and demanding, whilst still maintaining their playfulness, which is enriched by their many reading possibilities. They are a prime example of the experimental nature of contemporary Portuguese children's books, particularly those from small specialized publishing houses.

The child becomes an active participant in the reading process, which includes physical interaction through the manipulation of the book; because it is only through that engagement that the child can understand its message. In addition, the level of freedom in the reading process is increased, allowing (or demanding even!) moving forwards and backwards in the book, taking full advantage of the reader's spontaneity and direct interaction with the book's materials, which are essential to its construction and structure.

<sup>25</sup> J. Perrot, *Du jeu, des enfants et des livres*, Paris, Du cercle de la Librairie, 1987.



# Fotografía y construcción de la memoria escolar

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## *Photography and construction of school memory*

**ABSTRACT:** Beyond its potential as sources, or its ability to evoke individual memories, school photographs have also contributed to the construction of a school collective memory. Of these three great potentials of the school photography, testimonial, creative and evocative, this paper attempts to approach the second to analyze the role played by some photographic products in the construction of school memory. Specifically discuss some of them: school portraits souvenir, graduation boards, photographs or promotion group and school yearbooks as products based on image and created, as above, to the memory.

**EET/TEE KEYWORDS:** Photography; School memory; History of education; School history.

## *Introducción*

A lo largo de más de cien años, la escuela y su contexto nos han dejado un elevado número de fotografías cuyo valor, tanto desde la perspectiva patrimonial como historiográfica, poco a poco va adquiriendo su justo reconocimiento. Desde el *Grupo de Estudios de Historia de la Educación* de

la Universidad de las Islas Baleares<sup>1</sup>, tomando el testigo de algunos estudios previos pioneros en esta materia<sup>2</sup>, llevamos casi diez años defendiendo su valor patrimonial y utilizando la fotografía escolar como fuente histórica<sup>3</sup>. Más allá de su función ilustrativa, consideramos, y así lo hemos expresado en numerosas publicaciones, que la fotografía es un producto cultural que genera un discurso propio susceptible de ser analizado, contextualizado y contrastado con otros discursos derivados de otro tipo de materiales. Es, por tanto, una fuente útil para el análisis histórico, como pueda serlo un texto escrito o un testimonio oral, siempre que sea interpretada como tal y se entienda que la subjetividad inherente a cualquier producto cultural – la fotografía pocas veces es el reflejo exacto de lo que sucedió, tal y como sucedió – puede aportarnos información objetiva de interés para el estudio histórico. Por este motivo, más allá de los elementos que se hacen visibles en la fotografía, nos interesa saber qué motivó la toma de una imagen determinada, quién la hizo y porqué.

<sup>1</sup> Este artículo se ha realizado en el marco del proyecto titulado «La fotografía publicada como representación de los cambios y las continuidades en la cultura escolar (1900-1970)», EDU2014-52498-C2-2-P, financiado en el Programa Estatal de Fomento de la Investigación Científica y Técnica de Excelencia, Subprograma Estatal de Generación de Conocimiento, en el marco del Plan Estatal de Investigación Científica y Técnica y de Innovación 2013-2016. Las autoras del texto son miembros del Grupo de Estudios de Historia de la Educación (Institut de Recerca i Innovació Educativa IRIE - Universidad de las Islas Baleares).

<sup>2</sup> La revista «Historia de la Educación» dedicó un primer monográfico a esta temática en 1986. La vigésima edición de la ISCHE, celebrada en 1998, se centró en el análisis de lo visual en la configuración del espacio educativo a través de la historia. Las ventajas e inconvenientes de las imágenes para la investigación histórico educativa fue el tema central de la European Educational Research Association, celebrada en 1999. Las principales aportaciones realizadas en estos dos encuentros científicos se publicaron posteriormente en las revistas internacionales «Paedagogica Historica» (2000) y «History of Education» (2001). En España fue María del Mar del Pozo quien abrió este debate mediante un artículo de referencia publicado en 2006: M.M. del Pozo Andrés, *Imágenes e historia de la educación: construcción, reconstrucción y representación de las prácticas escolares en el aula*, «Historia de la Educación. Revista interuniversitaria», vol. 25, 2006, pp. 291-315.

<sup>3</sup> Un listado exhaustivo de las publicaciones derivadas de los proyectos de investigación ejecutados hasta ahora [«Cambios y continuidades en educación a través de la imagen: una mirada distinta sobre el proceso de renovación educativa. El caso de Baleares (1900-1936)» (HUM2007-61420) e «Inventario y estudio de las colecciones de fuentes fotográficas para la historia de la educación en Mallorca (1939-1990)» (EDU2011-23831)] puede consultarse en la Web del Grup d'Estudis d'Història de l'Educació de la UIB: <<http://gedhe.uib.cat/>> (último acceso: 30 de marzo de 2015). Entre ellas cabe destacar el número monográfico dedicado a fotografía e historia de la educación de la revista *Educació i Història*, número 15, de 2010. Accesible en: <<http://revistes.iec.cat/index.php/EduH/issue/view/4018/showToc>> (último acceso: 30 de marzo de 2015). Y la publicación en la que se recogen las primeras aportaciones del grupo a este tema: F. Comas, X. Motilla, B. Sureda, *Fotografia i historia de l'educació. Iconografia de la modernització educativa*, Palma de Mallorca, Leonard Muntaner editor, 2012. Accesible en: <[http://encore.uib.es/iii/encore/record/C\\_\\_Rb1977232\\_\\_Sfotografia+i+historia+de+l%27educaci%C3%B3\\_\\_Orighresult\\_\\_X2;sessionid=4D88035F661DD5AF9100E97BE808ECFF?lang=cat&suite=pearl](http://encore.uib.es/iii/encore/record/C__Rb1977232__Sfotografia+i+historia+de+l%27educaci%C3%B3__Orighresult__X2;sessionid=4D88035F661DD5AF9100E97BE808ECFF?lang=cat&suite=pearl)> (último acceso: 30 de marzo de 2015).



Este tipo de informaciones resultan imprescindibles para el análisis de la imagen fotográfica como documento histórico, y en esta línea hemos desarrollado nuestro trabajo a lo largo de los últimos años. No obstante, no sólo la intención con que se tomaron las fotografías influye en su correcta interpretación, también su localización, el espacio físico y contextual en el que se han guardado, su recuperación y uso actual e incluso su olvido resultan determinantes para su estudio.

Un análisis interpretativo de las fotografías desde todas estas perspectivas no sólo aportará información útil para la historia, también nos dirigirá hacia a otros campos igualmente interesantes, relacionados, por ejemplo, con la cultura visual o con la memoria.

Más allá de su potencial como fuentes, las fotografías escolares, en mayor o menor medida, han contribuido a la construcción de una memoria escolar compartida. Pero las relaciones entre fotografía y memoria son complejas. Nuestra memoria escolar se ha construido con la complicidad de las imágenes fotográficas que, como dijo Bourdieu<sup>4</sup>, son registros aparentemente objetivos de una realidad, más cercanos a la visión que en un momento dado se tenía de ella que a la realidad objetiva. Pero, a la vez, muchas veces regresamos a ella a través de la fotografía, pues su capacidad evocadora del recuerdo es innegable. Las fotografías, como hacen otras imágenes, tienen la capacidad tanto de crear o construir figuraciones que devienen memoria como de evocarla<sup>5</sup>.

De entre estos tres grandes potenciales de la fotografía escolar (testimonial, creador y evocador), en este trabajo intentaremos aproximarnos al papel que ha jugado la fotografía, o algunos tipos de productos fotográficos en concreto, en la construcción de la memoria escolar, por tanto, en su carácter creador.

El término fotografía escolar incluye una gran diversidad de fotografías, cada una de ellas con singularidades propias que determinan la interpretación que se hace de ellas como fuentes para la historia pero, en cuanto a elementos que han ayudado a la construcción de la memoria, nos interesaremos por aquellas que, tomadas en su momento con la intención de generar recuerdo, se convirtieron en productos iconográficos que han permanecido en espacios del recuerdo familiar y/o institucional y que, en consecuencia, han influido en la construcción de una memoria escolar tanto individual como colectiva.

Hablaremos concretamente, y a modo de ejemplo pues somos conscientes de la existencia de otros igualmente interesantes, de algunos productos que, partiendo de la fotografía, han sido creados y conservados para el recuerdo: los retratos de recuerdo escolar, las orlas, las fotografías de grupo o promoción y los anuarios escolares ilustrados.

<sup>4</sup> P. Bourdieu, *Un arte medio. Ensayo sobre los usos sociales de la fotografía*, Barcelona, Gustavo Gili, 2003.

<sup>5</sup> E. Colleldemont, *La memoria visual de la escuela*, «Educatio Siglo XXI», vol. 28, n. 2, 2010, pp. 133-156.

### 1. *La fotografía escolar, algunas anotaciones previas*

Cuando hablamos de fotografía escolar todos tenemos en mente una serie de imágenes habituales en nuestro imaginario colectivo que hacen referencia al contexto escolar en el pasado; sin embargo, a nivel práctico, y al no existir todavía consenso en cómo definir y delimitar este término, consideramos fotografía escolar a una gran diversidad de imágenes manifestadas de formas diversas y relacionadas con el espectro escolar como denominador común. En ocasiones anteriores hemos intentado aproximarnos a una clasificación de estas imágenes<sup>6</sup>. En estos momentos consideramos que pueden ser varios los criterios por los cuales, de forma casi inconsciente, agrupamos las fotografías bajo la denominación de escolares, creando con ello un género propio.

Un primer criterio está relacionado con su localización (dónde se guardan). Las fotografías que forman parte de los archivos, ordenados o no, de las propias escuelas tienen la consideración de escolares, al igual que las que la propia escuela divulga, sea cual sea el medio (revistas escolares, exposiciones, Facebook, webs, etc.). Esto mismo ocurre con las fotografías que custodian archivos y/o museos especializados en historia de la escuela, o archivos generales con fondos escolares.

Un segundo criterio hace referencia al espacio o contexto en el que se tomó la fotografía, independientemente de dónde se guarde en la actualidad. Las fotografías capturadas en el espacio escolar, entendiendo como tal desde el espacio físico de la escuela (aulas, patios, comedores, bibliotecas escolares, etc.) hasta cualquier espacio o contexto en el que se ha desarrollado alguna actividad incluida en el programa escolar (excursiones, visitas, colonias, etc.) son consideradas como fotografías escolares.

Finalmente un tercer criterio, a falta de poder reconocer espacios o contextos, o de tener cualquier otra información complementaria, será el de identificar en la fotografía elementos o símbolos del imaginario escolar, o sea, propios de lo que en nuestro imaginario colectivo consideramos vinculados al hecho escolar, independientemente de que en realidad tuvieran más o menos relación directa con la escuela.

Entendida así, la fotografía escolar apareció casi a la par que lo hizo la fotografía, hace más de siglo y medio, cuando las propias escuelas comenzaron a encargar a fotógrafos profesionales la toma de retratos individuales, grupales o, en el menor número de casos, instantáneas de algún momento concreto de la vida escolar. Su producción y difusión fue creciendo al compás del devenir del tiempo, auspiciada por los avances de la técnica fotográfica y su

<sup>6</sup> F. Comas Rubí, X. Morilla Salas, B. Sureda García, *Escuela y fotografía, entre el testimonio y la construcción del discurso narrativo*, en III Foro Ibérico de Museísmo Pedagógico / V Jornadas Científicas de la SEPHE (actas), Murcia, Universidad de Murcia, 2012, pp. 405-417.

democratización, acabando por constituir, a día de hoy, un documento visual común en la mayor parte de escuelas.

Como toda fotografía, la escolar es resultado de una intención de registro con el propósito de plasmar y preservar una información relacionada con la escuela de forma iconográfica. Entre fotografía y memoria se establece un claro vínculo fruto de la capacidad que tiene la primera de referir, mostrar y evocar acontecimientos o circunstancias del pasado. Pero, en algunos casos, esta intención de registro se convierte en una acción institucional destinada a crear recuerdo. Es entonces cuando la fotografía se convierte en un producto de devolución a la sociedad (a los alumnos, al centro, a las familias) a modo de imagen oficiosa, es decir, institucionalizada.

Consideramos que estos productos basados en la fotografía y destinados al recuerdo de la escuela han tenido un papel fundamental en la construcción de nuestra memoria escolar.

## 2. Fotografía y escuela, entre la historia y la memoria

Como bien han defendido algunos sociólogos e historiadores franceses, como Maurice Halbwachs<sup>7</sup> o Pierre Nora<sup>8</sup>, no debemos confundir memoria e historia. Aun estrechamente relacionadas, la historia y la memoria funcionan en dos registros totalmente diferentes. Mientras que la historia es una construcción, un conjunto explicativo basado en hechos que el historiador interpreta a partir de algo que ya no existe, pero que ha dejado rastros, la memoria es el recuerdo de un pasado vivido o simplemente imaginado. Hay diferentes niveles de la memoria. Se puede distinguir la memoria individual, que está profundamente conectada con una historia viva de una persona determinada, y la memoria social o colectiva. La memoria individual después de varias generaciones se despersonaliza y se convierte en abstracta, transmitiéndose hacia la memoria colectiva. Tal vez por eso Halbwachs y Nora coinciden en que la memoria es un fenómeno colectivo portado por grupos de individuos que experimentaron los hechos o creen haberlo hecho y que, aunque psicológicamente puedan vivirla de manera individual, en realidad la comparten con otros. Es lo que llamamos memoria social, en la que un grupo concreto de gente comparte una historia común. Esta memoria, que puede ser manipulada e incluso cambiada, será clave para crear sentimientos de identidad individual y colectiva. En definitiva,

<sup>7</sup> M. Halbwachs, *La memoria colectiva*, Zaragoza, Prensas universitarias de Zaragoza, 2004.

<sup>8</sup> P. Nora (dir.), *Les Lieux de mémoire*, 3 vols, Paris, Gallimard (Bibliothèque illustrée des histoires), vol. 1: *La République* (1984), vol. 2: *La Nation* (1987), vol. 3: *Les France* (1992).

como dice Collelledemont, se trata de «una memoria que, ciertamente, puede ser vivida, experienciada o transferida»<sup>9</sup>.

La memoria social está íntimamente relacionada con tradiciones orales, espacios o lugares, objetos e imágenes. Estos últimos, los objetos y las imágenes, encarnan significados que a menudo traspasan la generación de quienes los crearon y, aun así, son fácilmente reconocibles por los miembros de una comunidad. Si las fotografías de por sí son una forma materializada de la memoria que proporcionan acceso al recuerdo, las fotografías realizadas como recuerdo, o incluidas en algún producto cultural creado con la misma intención, son doblemente representativas de esas materialidades que han contribuido, de manera intencionada, a construir la memoria<sup>10</sup>.

En el caso concreto de las fotografías escolares, aun cuando todas pueden ser objeto de estudio desde la historia, lo cierto es que algunas aportan mucha más información sobre la memoria escolar que sobre la historia de la escuela. Es el caso de los retratos individuales de recuerdo escolar, de las orlas y de las fotografías grupales de promoción. Mientras que el grueso de fotografías escolares son consideradas elementos inequívocos de la cultura material de la escuela, en tanto que nos hablan de actividades, espacios, procesos y dinámicas en general asociadas al día a día de la institución educativa, al tiempo que hacen visibles otros materiales propios de la cultura escolar como uniformes, libros, pizarras, cuadernos, materiales de laboratorio, etc., en el caso de los retratos de recuerdo escolar, las orlas y las fotografías de grupo, su vínculo será diferente. Se relacionarán con la escuela y sus procesos de escolarización, como ya destacó Alves:

A dimensão educativa desse tipo de retrato é inegável. Uma gama de valores se insere no gesto de retratar os alunos, ao conceder-lhes um lugar particular na história, como portadores dos atributos que só a escola lhes poderia conferir. No mesmo gesto, fortifica os padrões de comportamento que lhe são pertinentes, retoma o enquadramento do retrato impregnando-o das intenções que compõem a escolarização<sup>11</sup>.

Pero por regla general, estas imágenes, comparadas con otras fotografías escolares, nos dirán muy poco o nada de la práctica cotidiana de las escuelas así como de los materiales usados en ellas. Son más bien productos culturales, elementos institucionalizados que incluso llegan a no ser estrictamente escolares.

En el caso del retrato escolar, a pesar de formar parte del álbum familiar y, en consecuencia, poder abordar su estudio desde el ámbito de las fotografías familiares, aceptamos considerar que pertenezca al género de fotografías

<sup>9</sup> Collelledemont, *La memoria visual de la escuela*, cit., p. 146.

<sup>10</sup> S. Dornier-Agbojjan, M. Conill, *Fotografías de familia para hablar de la memoria*, «Historia, antropología y fuentes orales», 2004, vol. 9, n. 32, pp. 123-132.

<sup>11</sup> C. Alves, *Educação, memória e identidade: dimensões imateriais da cultura material escolar*, «Historia da Educação», vol. 14, n. 30, enero/abril 2010, p. 113.

escolares dado que alude directamente a la escuela y al niño como escolar. En muchas ocasiones contiene elementos y accesorios propios de la escuela o que la representan, tanto de manera genérica (mapas, pizarras, etc.) como específica de un momento o época determinados, o de un centro concreto (por ejemplo mostrando la figura del santo fundador de la escuela o cualquier otro tipo de elemento que permita identificar el centro). No obstante, como se explicará con más detalle a lo largo de este artículo, la información que aporta a la historia de la escuela se ve eclipsada por el papel que juega este tipo de fotografía en la construcción de la memoria escolar.

Con una estética menos cargada de simbología, aunque no exenta de ella, debemos mencionar las orlas. Son productos creados expresamente para el recuerdo de la escuela, generalmente asociadas a niveles de enseñanza secundaria y/o superior, que se sirven de retratos individuales para formar una imagen de grupo jerarquizada y dejar constancia, no sólo con la imagen, sino también con nombres y apellidos, de quienes se identifican con un colectivo determinado (promoción, grupo-clase, etc.) por el hecho de haber coincidido en un mismo contexto escolar y a idéntico tiempo. Como fuentes testimonian quienes estuvieron en un mismo ambiente escolar físico y temporal; pero más allá de esta capacidad documental, aportan poca información para interpretar la historia de la escuela. Nuevamente nos hallamos ante un tipo de fotografía que, bien por sí misma, bien formando parte de un anuario o almanaque escolar, tendrá más relación con la construcción de la memoria que con la propia historia escolar.

Por otra parte, aun siendo también fotografías tomadas con la intención de engrosar el recuerdo de la escuela, las fotografías de grupo representan un producto menos ceremonioso para el recuerdo escolar. Exentas de la simbología de las anteriores, estas fotografías prácticamente en todas las ocasiones son tomadas en los exteriores de la escuela, sirviendo de fondo o bien los espacios abiertos en las inmediaciones del colegio o bien el propio edificio escolar, no pudiéndose observar el patrimonio escolar o la materialidad de sus elementos (mobiliario, dotación de recursos, decoración, distribución de espacios, etc.). Forman parte, en muchas ocasiones, tanto del álbum familiar como de los almanaques ilustrados que editan algunas escuelas. Tomando palabras de Honorio Velasco podemos decir que son «fotografías de identidades que consolidan una memoria de reconocimiento de individuos integrados en un grupo»<sup>12</sup>.

Finalmente debemos mencionar los almanaques escolares, revistas y/o anuarios que publicaban las escuelas con intención no sólo de preservar

<sup>12</sup> H.M. Velasco Maíllo, *Fotografías escolares, imágenes institucionales. Miradas retrospectivas a la fotografía en la escuela (1900-1970)*, en A. Bautista García-Vera, H.M. Velasco Maíllo, *Antropología audiovisual: medios e investigación en educación*, Madrid, Editorial Trotta, 2011, p. 32.

el recuerdo sino también de crear identidad de centro. En estos productos encontraremos todo tipo de imágenes fotográficas, testimonio de quienes fueron y de las cosas que hicieron y que el centro escolar considera representativas de su ideario, de sus prácticas y de su identidad pedagógica, ideológica, religiosa y social. Destacarán las fotografías de promoción, que dejan constancia de quienes pervivirán en la memoria como colectivo de alumnos y profesores del centro, pero a veces se combinarán estas imágenes con otras destinadas a evocar recuerdos de actividades concretas y a reforzar la identidad del centro.

Veamos, uno a uno, estos productos escolares como ejemplo del uso de la fotografía en la construcción de la memoria.

### 3. *Los retratos de recuerdo escolar*

Lo cierto es que este tipo de fotografías, atendiendo al tercer criterio antes señalado por el cual, de forma casi inconsciente, las consideramos escolares, presentan una serie de características muy particulares. Se trata, ante todo, de retratos, fotografías de estudio que incluyen motivos o símbolos escolares o asociables a la escuela, pero que no pretenden dejar constancia o testimonio de prácticas pedagógicas, espacios escolares o acontecimientos propios de la escuela.

Su naturaleza nos lleva, en primer lugar, a detenernos en el género retratístico, sobre el que vamos a arrojar unos breves apuntes antes de hablar propiamente de este tipo de imágenes. El retrato fotográfico, inspirado en los retratos pictóricos, es un género que tiene sus orígenes en los inicios mismos de la práctica fotográfica. Según Burke<sup>13</sup>, el retrato es una forma simbólica, un género de origen pictórico regido por un sistema de convenciones en cuanto a gestos, posado o accesorios y objetos representados, que cambian muy lentamente a lo largo del tiempo. La tradición, dentro de las familias nobles y burguesas, de encargar retratos de sus miembros a pintores de renombre dejó paso, hacia finales del siglo XIX, a los retratos fotográficos que, sin ser tan artísticos como los primeros, ni disfrutar de la riqueza de colores y materiales, eran más inmediatos y reales, o fieles a la realidad, pero también permitían mostrar, tal y como se pretendía con los retratos pictóricos, no sólo las cualidades físicas de las personas sino también las morales.

En base a la dimensión realista y moral de los retratos, y aunque hubo diferentes tipologías o subgéneros (fotos-carnet, retrato clásico, tarjeta de visita, recuerdo escolar...) tal y como destacan Finol, Djukich y Finol<sup>14</sup>, podemos

<sup>13</sup> P. Burke, *Visto y no visto. El uso de la imagen como documento histórico*, Barcelona, Crítica, 2001.

<sup>14</sup> D.E. Finol, D. Nery, J.E. Finol, *Fotografía e identidad social: retrato, foto carné y tarjeta de*



Pic. 1. *Souvenir scolaire*. Autor: E. Dumersil Marguin Vincennes. Propietario: F. Comas. Sin fecha (aproximadamente año 1910).



Pic. 2. *Retrato escolar de Andreu Comas*, curso 1942/43. Autor: Foto Martín. Propietario: A. Comas.

hablar de la existencia de un discurso retratístico caracterizado por posados rígidos y decorados o ambientes cerrados, que a nivel semiótico presenta dos grandes rasgos característicos: por una parte el de identidad, ya que el retrato pretende reflejar los rasgos faciales homologables de una persona, y por otro el de reconocimiento social de momentos u ocasiones concretas que guardan relación con la biografía de la persona fotografiada (cumpleaños, comuniones, bodas, etc.) o que representan formas de consagración o de prestigio de la misma, y por extensión de su familia.

Al hablar de retrato escolar estamos haciendo referencia a aquellas fotografías que forman parte de la mayoría de álbumes familiares, donde el niño en edad escolar, solo o acompañado de sus hermanos, es retratado a menudo, y de manera estereotipada, rodeado de elementos y símbolos que normalmente podrían identificarse con el mundo escolar, aunque esta premisa no se cumpla en todos los casos. Constituyen fotografías tomadas por un profesional, que se ha ofrecido o que ha sido requerido por la escuela, con un objetivo comercial que no es otro que la venta de la «estampa» a las familias.

Evidentemente, este tipo de fotografías, con estéticas muy diferentes, pero con algunos elementos en común, forman parte de los álbumes fotográficos no sólo de las familias españolas, sino también de otros países, donde la práctica de utilizar el retrato como recuerdo escolar fue también muy extendida. Hablamos pues de un fenómeno internacional y generalizado. Es cierto que estas fotografías pueden ser muy distintas, dependiendo de la tradición de cada lugar y momento, en algún caso se trata de retratos de niños al estilo más clásico, sin accesorios y con decorado sencillo, pero montadas sobre una cartulina donde queda explícito que se trata de un recuerdo escolar (véase Pic. 1), mientras que

otros utilizan una serie de elementos reconocidos como propios de la escuela en un momento determinado para crear un escenario simbólico completamente estereotipado – mapas, libros, símbolos religiosos y/o políticos, etc. – (véase Pic. 2). Sea como sea, sin embargo, son imágenes inequívocas, que se reconocen con facilidad, y que todos asociamos a la escuela.

El retrato escolar aparece como un registro siempre positivado, es decir, como una especie de trofeo dentro de los objetos significativos de la memoria de los tiempos en la escuela. De este modo lo plantea Alves<sup>15</sup>, añadiendo que el conjunto de sentidos asociados a esas fotografías hacen emerger las delicadas e intrincadas relaciones entre memoria, identidad y cultura material escolar.

Por su parte, Honorio Velasco, dentro de una de las pocas publicaciones en las que se habla específicamente de la fotografía de recuerdo escolar, presenta estos retratos como un subgénero dentro de la llamada fotografía escolar. Sin embargo, destaca también su vinculación biográfica, a semejanza de otras fotografías de recuerdo de etapas y acontecimientos como el servicio militar o la boda, que también formarán parte del álbum familiar, y su relación tanto con el retrato de estudio como con la tarjeta postal. Esta vinculación biográfica hace que, en palabras de Velasco<sup>16</sup>, dentro de los archivos familiares las fotografías escolares sean consideradas, antes que nada, fotos de recuerdo que, mezcladas con otro tipo de fotografías, constituyen los álbumes de familia; aparentemente desprovistas ya de la etiqueta de «material escolar» y, engarzadas unas con las otras, se toman más propia e inequívocamente como imágenes biográficas.

Cada uno de los retratos de recuerdo escolar forma parte de la memoria del individuo retratado, pero al integrarse en los álbumes familiares, y con el transcurso de los años, estas imágenes acaban despersonalizándose y convirtiéndose en elementos de la memoria familiar. A su vez, la presencia de unas mismas fotografías en la mayoría de álbumes familiares configura una memoria social ligada a elementos comunes e identidades colectivas. Por este motivo, en el imaginario colectivo los retratos de recuerdo escolar forman parte inequívoca de la memoria de la escuela. La sociedad identifica este tipo de fotografías con la escuela de manera automática, hasta el punto de considerarlas como las más representativas del imaginario colectivo vinculado a la institución escolar, tal y como lo demuestra el hecho de que se recurra a ellas en la mayoría de representaciones gráficas de la memoria de la escuela (exposiciones, museos de la escuela, webs sobre memoria escolar, etc.). En ocasiones, esta memoria construida con imágenes determina lo que pensamos que realmente fue la escuela en el pasado. De hecho, conocer la influencia que ejerce este imaginario escolar sobre la memoria de la escuela, y en concreto

<sup>15</sup> Alves, *Educação, memória e identidade: dimensões imateriais da cultura material escolar*, cit., pp. 107-108.

<sup>16</sup> Velasco Maíllo, *Fotografías escolares, imágenes institucionales. Miradas retrospectivas a la fotografía en la escuela (1900-1970)*, cit., pp. 15-39.



los estereotipos que ha generado, debe hacernos replantear algunas cuestiones sobre como concebimos e interpretamos el pasado. Kate Rousmaniere<sup>17</sup>, en un interesante artículo publicado en *History of Education*, mostraba, a través de una serie de fotografías realizadas en un mismo contexto escolar, como este imaginario colectivo nos lleva a identificar como escolares sólo a las que hacen visibles una serie de estereotipos tales como orden, disciplina o jerarquía, mientras que las que visualizan movimiento, juego o diversión, por si solas y sin más información que nos permita contextualizarlas, a simple vista raramente las llamaremos escolares. Será imprescindible, para hacer historia, tener en cuenta el poder de la imagen en la construcción de la memoria, y el poder de la memoria en la creación de estereotipos que la interpretación histórica debe superar. Memoria e historia, por tanto, no deberán confundirse.

Volviendo a los retratos de recuerdo escolar, cabe decir que probablemente constituyen uno de los registros fotográficos más vinculados a la memoria de la escuela, entendida esta como la memoria social o colectiva que construimos desde el presente a partir de elementos del recuerdo que se han transferido hacia ella con el paso de los años. Sin embargo, su utilidad como fuentes históricas implicará una lectura diferente, en la que no vamos a entrar aquí, aunque podamos avanzar que no será ni de lejos tan relevante como la que tiene en la construcción de la memoria escolar<sup>18</sup>. Aunque parezca paradójico, posiblemente algunas de las fotografías que más asociamos todos a la escuela en el pasado, y en este caso concreto hacemos referencia a los retratos de recuerdo escolar, son las que menos información sobre la historia de la misma nos proporcionan.

Tal vez estos retratos son el vestigio del pasado escolar que mejor nos permite esta distinción entre historia y memoria de la escuela.

#### 4. *Las orlas de promoción*

Igual que los retratos de recuerdo escolar, las orlas son productos fotográficos creados para el recuerdo institucional e individual más que de un período de escolarización, de la obtención de un nivel o grado académico determinado. Tener un retrato de recuerdo escolar o una fotografía de grupo significa haber estado o pertenecido a una escuela en un momento determinado, mientras la orla significa haber culminado un periodo académico.

<sup>17</sup> K. Rousmaniere, *Questioning the visual in the history of education*, «History of Education», vol. 30, n. 2, 2001, pp. 109-116.

<sup>18</sup> Una primera reflexión sobre estas fotografías y su utilidad como fuentes histórico-educativas ya se presentó en las XXI Jornadas de Historia de la Educación celebradas en Palma de Mallorca en noviembre de 2014. Véase: F. Comas, P. Fullana, S. González, *El retrat escolar, aproximació a un subgènere iconogràfic*, en F. Comas, S. González, X. Motilla, B. Sureda (edd.), *Imatges de l'escola, imatge de l'educació*, Palma de Mallorca, Edicions UIB, 2014, pp. 377-388.

Aun con evidentes diferencias, en muchos sentidos son muy parecidas a los retratos de recuerdo escolar, pues técnicamente son un producto de fotógrafo profesional, basado en el retrato o los retratos (en este caso de todos los alumnos y profesores de una misma promoción, a veces uniformados), e iconográficamente se acompañan de ornamentaciones simbólicas representativas de la institución educativa en cuestión. No obstante, presentan ciertas características específicas que las diferencian tanto de los retratos de recuerdo escolar como de las fotografías de grupo<sup>19</sup>.

En heráldica se llama orla a la pieza honorable que rodea el interior del escudo por todos sus lados, sin llegar a tocarlos; más genéricamente podemos hablar de adorno que rodea algo. En el caso que nos ocupa, lo rodeado por un adorno son los retratos de los estudiantes y profesores de una misma promoción, pero a diferencia de lo que llamamos fotografías de grupo, la orla que envuelve los retratos de quienes forman esa promoción actúa como la ornamentación que enmarca un título académico. En el fondo tiene el mismo sentido, el título visualiza oficialmente una acreditación individual, mientras la orla fotográfica visualiza oficiosamente la acreditación del grupo o promoción correspondiente. Utilizando los retratos en forma de fotografía de carnet con nombres y apellidos, quienes conforman una promoción de unos estudios determinados, y el profesorado que les ha acompañado a lo largo de los años hasta la acreditación, se colocan en la orla una vez culminados los estudios y obtenido el nivel académico.

Aunque generalmente asociamos las orlas a enseñanzas superiores y especialmente a la universidad, lo cierto es que podemos encontrar productos de este tipo en los diferentes niveles de enseñanza desde el siglo XIX hasta hoy. Los institutos de enseñanza secundaria (véase Pic. 3) o las escuelas normales (véase Pic. 4) tenían costumbre, ya a partir de la segunda mitad del XIX, de encargar este tipo de productos fotográficos<sup>20</sup>. En el siglo XX se le añaden escuelas técnicas y profesionales, así como algunas escuelas primarias, aunque con menos incidencia por motivos diversos que pueden ir desde la falta de tradición hasta de recursos, pero básicamente porque la orla fotográfica nace asociada al reconocimiento académico, por lo que se hace más habitual y apreciada cuanto más elevado es el nivel de estudios alcanzado.

Al igual que el retrato de recuerdo escolar o la fotografía de grupo, de la que hablaremos en el próximo apartado, la orla es un producto para el recuerdo, y

<sup>19</sup> Un análisis descriptivo de este tipo de productos fotográficos fue publicado en *History of Education and Children's Literature* por F. Obino Corrêa Werle. Por este motivo, obviaremos este aspecto en el presente trabajo, remitiendo a: F. Obino Corrêa Werle, *Graduation boards as registers of the institutional history*, «History of Education and Children's Literature», vol. 4, n. 2, 2009, pp. 149-166.

<sup>20</sup> Cabe recordar que en España, durante el siglo XIX y buena parte del XX, los institutos de enseñanza secundaria o las escuelas normales en muchas provincias representaban el nivel académico más elevado al que accedía sólo una parte minoritaria de la población escolar.



Pic. 3. Orla del Colegio de Nuestra Señora de Montesión (Mallorca). Bachilleres de la promoción de 1949. Autor: desconocido. Publicada en: *Revista del Col·legi Lluís Vives*.



Pic. 4. Orla de la Escuela Normal Gabriel y Galán (Salamanca, España). Autor: Foto Mimosas. Propietario: Brígida Benito Valencia.

como tal pasa a formar parte del ámbito familiar. No obstante, también es un producto de acreditación (sin validez académica) y de prestigio social. Representa un recuerdo vinculado a la vida académica de un individuo, pero cuanto más elevado es el nivel de estudios obtenido por la promoción de estudiantes que aparece en esa orla, más prestigio supone tenerla y mostrarla. Por ello la orla se expone más que otras fotografías escolares, y no sólo en el ámbito familiar, sino también en el profesional e institucional. Muchas universidades, institutos y escuelas tienen en sus paredes colgadas las orlas de promociones antiguas, que le aportan prestigio y experiencia. Muchos profesionales liberales, sobre todo de profesiones que requieren estudios universitarios para ejercerlas, también exponen sus orlas universitarias junto a los títulos oficiales como muestra visible de su nivel y preparación académica. Tal y como comenta Corrêa Werle en un artículo publicado en esta revista:

A graduation is an important moment in the operation of schools, highlighted reference for proving the successful pedagogical acts processed inside it. It is the final moment of a training process, meaning a graduation, a breakthrough publicly acknowledged in the scale of schooling, which differentiates from the ones who have it from the rest of the people and that, in the case of vocational training courses, marks a prerogative of work<sup>21</sup>.

Más allá del ámbito familiar, la orla se convierte en una fotografía de recuerdo escolar visible en espacios públicos y profesionales, pasando del recuerdo individual al colectivo, pues no sólo quienes aparecen en la orla sino también quienes la observan reconocen en esa imagen instituciones educativas que socialmente tienen prestigio. Nuevamente, como documento histórico, la información que nos aporta es sólo testimonial de quienes integraron una promoción de un nivel de estudios determinado o de cuál era su profesorado. El prestigio académico, sin embargo, se construye en nuestra memoria escolar con representaciones visuales de acreditación que socialmente reconocemos como premios, medallas, títulos oficiales y orlas fotográficas.

### 5. *Las fotografías de grupo clase*

Dentro del concepto de fotografía de recuerdo escolar encontramos también las de grupo como imágenes en las que aparecen representados un conjunto de escolares de un mismo curso, clase o escuela. Este tipo de fotografías forman parte de la tradición escolar y vienen tomándose en la mayor parte de escuelas desde hace más un siglo. Generalmente se encargan a fotógrafos profesionales que, en el momento de la toma de la instantánea, tienen en cuenta numerosos aspectos relativos a la organización (para evitar problemas en el

<sup>21</sup> Obino Corrêa Werle, *Graduation boards as registers of the institutional history*, cit., p. 152.

movimiento de un gran grupo de personas no adultas), iluminación (valoración de las condiciones internas o externas del lugar escogido), enfoque (medición y exposición adaptada a la distribución de los protagonistas) y composición (disposición de las personas fotografiadas).

Pero mucho más allá de los aspectos técnicos que implica la toma de una fotografía de este tipo, estas imágenes destacan por su capacidad para crear y recrear una idea de cohesión social, una representación de la conformación o identidad de grupo. Toda la escenografía que vemos detrás de cada una de esas fotografías, con numerosos elementos en común y perfectamente reconocibles, es muy diferente a la que podríamos identificar en otro tipo de instantáneas de convivencia escolar, especialmente en el caso de situaciones lúdico-formativas como podrían ser las excursiones o viajes de estudios. Cada una de estas fotografías, aun pudiendo representar al grupo o clase completo lo harían de un modo muy diferente, es decir, cada una de ellas tendrá sus propios registros, y la memoria así los ha conservado y transmitido<sup>22</sup>.

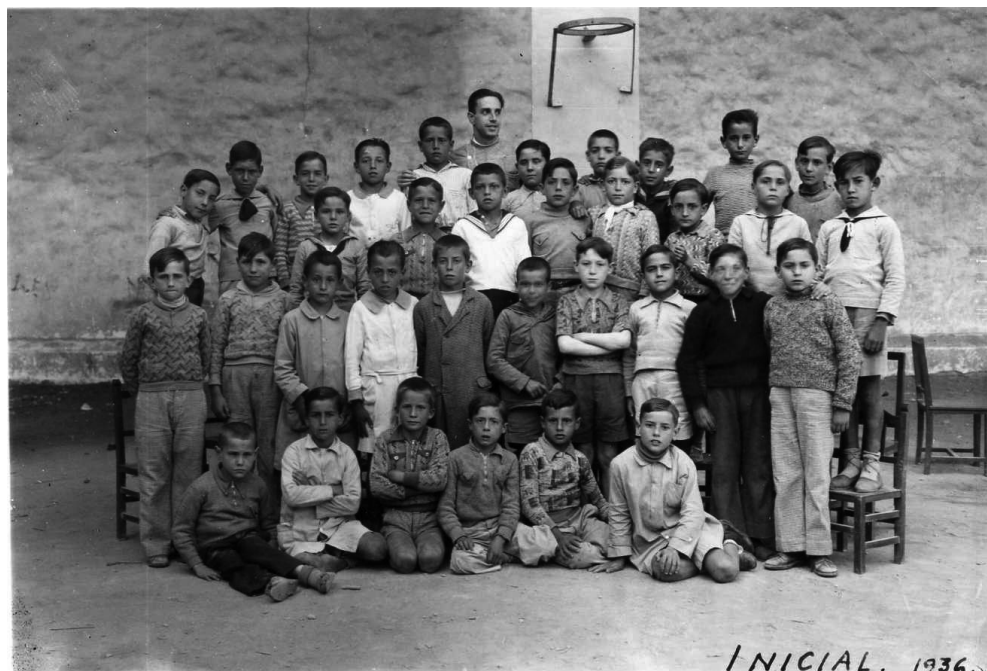
En este caso nos interesan las fotografías de grupo o clase tomadas de una forma «oficial» o «institucional» como imagen testimonial del curso, la clase o el grupo escolar, y con el objetivo de convertirse en producto de devolución a las familias. Este tipo de fotografía es fácilmente reconocible y se identifica, normalmente, de forma bastante evidente con el mundo escolar.

Las fotografías escolares de grupo nos muestran agrupaciones de individuos frecuentemente dispuestos en contigüidad, muy próximos los unos a los otros, y colocados generalmente en distintos niveles de altura para facilitar la visión de todos los presentes. La distribución ordenada de los sujetos es uno de los aspectos a los que mayor importancia parece darse a la hora de la captura de la instantánea, siendo el principal mecanismo a través del cual se consigue esa idea de conformación de grupo. Este posado bien organizado representa al grupo como «un todo», pero al mismo tiempo tiene la función básica y reconocida de dar visibilidad a cada uno los miembros de ese grupo<sup>23</sup>.

Por otra parte, la composición de muchas de estas fotografías muestra habitualmente al grupo de escolares rodeando al maestro o, en ocasiones, dispuesto junto a éste. Estas fotografías pueden presentar un fondo reconocible (normalmente el edificio escolar o algún aspecto de sus instalaciones), en cuyo caso los alumnos retratados suelen estar a una mayor distancia del objetivo, o pueden ser imágenes sin un fondo identificable (utilizándose en la mayor parte de las ocasiones una pared como telón de fondo o los espacios abiertos y exteriores del centro escolar), en cuyo caso se produce una mayor proximidad

<sup>22</sup> A. Escolano Benito, *Escenografías escolares: espacios y actores*, en *Etnohistoria de la escuela: XII Coloquio Nacional de Historia de la Educación* (actas), España, Universidad de Burgos, 2003, p. 369.

<sup>23</sup> Velasco Maíllo, *Fotografías escolares, imágenes institucionales. Miradas retrospectivas a la fotografía en la escuela (1900-1970)*, cit., p. 28.



Pic. 5. Fotografía de grupo de los alumnos del curso inicial del Centro de Enseñanza Infantil y Primaria de Prácticas de Palma de Mallorca (España). Fondo: CEIP de Pràctiques. Fecha: año 1936.



Pic. 6. Fotografía de grupo de las alumnas de la Escuela Parroquial de Inca. Fondo: Archivo y Museo de la Educación de las Islas Baleares (AMEIB). Fecha: curso 1968/69.

de los sujetos, aspecto que tiende a dar forma al grupo como unidad (véanse Pic. 5 y 6).

Frecuentemente, el grupo de iguales es capturado en la instantánea de forma estática e inmóvil, cada miembro guarda la posición que le ha sido asignada en alguna de las filas o niveles que integran la composición y la consecuencia final más evidente, de nuevo, es la transmisión de una impresión de homogeneidad de grupo. Contribuye también a esa homogeneización la vestimenta formal de los miembros, conformados en razón de ciertas reglas y estricta o flexiblemente uniformados, evidentemente más marcada en el caso del uso de uniformes, pero también presente en prendas elegantes, limpias y bien colocadas (camisas dentro del pantalón, cuellos arreglados, gorros bien colocados, etc.) de unos escolares que probablemente no llevarían ese tipo de indumentaria para un día ordinario en la escuela.

Otro aspecto a destacar en este tipo de fotografías es la habitual quietud y similitud de gestos y posiciones, en esencia la actitud ante el hecho del registro iconográfico (seriedad, firmeza, hieratismo, pero también sonrisas en algunas ocasiones), probablemente el aspecto más complicado y laborioso para el profesional que tomaba la foto.

En esencia, las fotografías de grupo muestran numerosas similitudes entre una clase y otra, entre un curso y otro, y recopiladas en los anuarios transmiten una idea de progresión y desarrollo de los alumnos al mismo tiempo de patentizan la evolución de la propia institución.

Quizá las fotografías de grupo no se han conservado tanto como el retrato de recuerdo escolar, por la simple diferencia que en las primeras el sujeto es una pequeña parte del todo, despersonificándose su individualidad, mientras que en las segundas el alumno es el único e indiscutible protagonista y para las familias su conservación tendría un mayor valor sentimental. Aún así, las fotografías de grupo, sin ser un producto tan ceremonioso como las orlas, se transforman claramente en productos tomados con la intención de engrosar el recuerdo de la escuela y aportan, asimismo, mucha más información sobre la memoria escolar que sobre la historia de la escuela.

## *6. Los anuarios colegiales como almanaques de fotografías escolares de recuerdo*

Retratos escolares individuales, orlas y fotografías de grupo se convierten en un producto de devolución a las familias y constituyen elementos fundamentales para la construcción de la memoria escolar, tal y como se ha intentado reflejar hasta el momento en este trabajo. Pero lo cierto es que, en ocasiones, este tipo de fotografías no llegan a las familias de forma directa sino que lo hacen a través de los anuarios colegiales, auténticos almanaques de fotografías de recuerdo escolar en los que tienen una presencia preponderante ese tipo de instantáneas.

Por este motivo se ha creído necesario incluir en este trabajo una breve referencia a los mismos, entendiendo aquí su valor como productos fotográficos.

El anuario consiste en un soporte físico – con numerosas similitudes al álbum tradicional – creado por el propio centro escolar con la finalidad esencial de que alumnos y profesores puedan recordar de alguna manera las vivencias, actividades y compañeros de curso, convirtiéndose en una herramienta eficaz y única para mantener vivo el recuerdo escolar. Pero más allá de la intención de preservar el recuerdo, los almanaques escolares, revistas y/o anuarios que publicaban las escuelas aspiraban también a crear identidad de centro y a generar lo que constituiría su propia memoria institucional. En consecuencia, en estos productos encontraremos todo tipo de imágenes fotográficas, testimonio de quienes fueron sus alumnos y profesores, pero también de las actividades que el propio centro consideró más destacadas o representativas de su ideario, prácticas e identidad. De este modo, esta forma de soportes se convierte en un claro reflejo de la manera en que la escuela se representaba a sí misma, eligiendo unas fotografías y no otras, retratando unos acontecimientos concretos y no otros y, en definitiva, proyectando una imagen propia que, por un motivo u otro, interesaba exhibir.

En esencia, el anuario colegial no deja de ser un álbum escolar en el que se coleccionan los personajes y las actividades más destacadas de un centro durante un año académico, del mismo modo que lo haría un álbum familiar en su contexto. Ambas cuestiones se remarcan en algunos de los anuarios publicados en Mallorca durante la época del franquismo; este es el caso que nos encontramos, por ejemplo, en el preámbulo publicado en el primer número del *Anuario del Colegio Beato Ramón Llull*, donde se llega a apuntar la idea del material como un catálogo de fotografías para el recuerdo:

Para los que nos van a dejar, este libro será un precioso recuerdo de días que se irán paulatinamente alejando; recuerdo de personas que se esmeraron en su formación y enseñanza; recuerdo de amigos, compañeros entrañables del quehacer cotidiano, monótono y a veces aburrido; recuerdo de planes, de ideas, de proyectos, que quizá pronto se van a convertir en realidad<sup>24</sup>.

A la hora de acercarnos al estudio y análisis de los anuarios escolares encontramos numerosas coincidencias y explicaciones sugerentes en los trabajos cuyo objeto de estudio son los álbumes ilustrados, los libros-álbum narrativos e, incluso, los álbumes familiares. De hecho, consideramos que muchas de las definiciones aportadas en esos estudios pueden trasladarse perfectamente, con la inevitable adaptación al objeto del que hablamos, al campo de los anuarios escolares.

Así, por ejemplo, la definición que otorga Van der Linden a los álbumes narrativos encaja con la idea que sostenemos del anuario escolar: «el álbum

<sup>24</sup> Texto extraído del *Anuario del Colegio Beato Ramón Llull* (Inca-Mallorca), curso 1957/58.



sería una forma de expresión que presenta una interacción entre textos (que pueden ser subyacentes) e imágenes (especialmente preponderantes) en el seno de un soporte libro»<sup>25</sup>. Lo mismo sucede con la definición aportada por Bosch: «álbum es arte visual de imágenes secuenciadas fijas e impresas afianzado en la estructura de libro, cuya unidad es la página, la ilustración es primordial y el texto puede ser subyacente»<sup>26</sup>.

En el caso de los anuarios escolares prevalece la imagen sobre el texto escrito, convirtiéndose en una de las características fundamentales y distintivas de este instrumento. Es decir, en el anuario se delega en la imagen la mayor parte de la carga narrativa y se hace un empleo de la fotografía como elemento principal de transmisión, relegando el texto escrito a un segundo plano e, incluso, obviándolo y reduciendo el contenido del anuario al mensaje que se transmite a través de la fotografía. Y es que, tal y como menciona Silva-Díaz, «por lo general, las ilustraciones invitan a detenerse a mirar, mientras que el texto lleva a avanzar»<sup>27</sup>. Este tipo de construcción del anuario no se encuentra en otros materiales que pertenecen al amplio concepto de prensa pedagógica (revistas, periódicos, boletines...) en los que la imagen es un elemento accesorio al texto, un componente básicamente ilustrativo, y que no aparece de forma tan frecuente.

Por tanto, en el anuario se acostumbra a confiar a la imagen la descripción de los sujetos – docentes y discentes –, los escenarios escolares en los que éstos se mueven y las actividades más llamativas que realizan durante un curso académico. Esa presencia constante y preponderante de la imagen ayuda, indudablemente, a la construcción de la memoria histórica.

Las fotografías que contienen estos anuarios, en su momento de recopilación, coadyuvaban a la construcción del recuerdo, pero con el devenir del tiempo éstas han pasado a formar parte del recuerdo colectivo, produciéndose un mecanismo que nos lleva a visibilizar esas fotografías como propias y, en consecuencia, este producto fotográfico facilitaría la construcción de la memoria escolar colectiva. Todo ello sin olvidarnos que, por otra parte, el anuario también tendría la capacidad de dar visibilidad a la institución escolar en cuestión y, asimismo, que el hecho de que un centro contara con soportes de este tipo generaba un cierto prestigio y reconocimiento social.

La presencia de estos elementos en archivos (forman parte de lo que se considera como prensa histórica) configura esa memoria institucional. Pero los anuarios también se guardan en los hogares y forman parte del acervo familiar, aspecto que nos sitúa ya en un plano diferente al anterior y que constituiría esa memoria colectiva a la que hemos venido haciendo referencia a lo largo

<sup>25</sup> S. Van der Linden, *Lire l'album*, Le puy-en-Velay, L'atelier du poisson soluble, 2006.

<sup>26</sup> E. Bosch, *Hacia una definición de álbum*, «Anuario de Investigación en Literatura Infantil y Juvenil», vol. 6, n. 5, 2007, p. 41.

<sup>27</sup> C. Silva-Díaz, *La función de la imagen en el álbum*, «Peonza», nn. 75-76, abril 2005, p. 29.

de todo este artículo. Esa presencialidad de estos álbumes escolares en estos entornos hace que se conviertan en elementos básicos para la construcción de la memoria.

Quizá la principal diferencia entre estos productos fotográficos y los analizados anteriormente – retratos, orlas y fotografías de grupo o promoción – sea el diferente nivel de conservación de los mismos. Mientras que para el retrato de recuerdo escolar la preservación por parte de las familias se convertía en una cuestión fundamental, probablemente por el recuerdo de esa individualidad y por su capacidad para destacar el protagonismo del escolar, en el caso de los anuarios diríamos que su conservación por parte de las familias no sería una cuestión prioritaria. Probablemente con el anuario estamos ante un producto mucho más «endebles», con mayor poder en el plano de la memoria institucional, una cuestión de prestigio social de la institución, que en el de la memoria individual, pues la presencia de los sujetos queda tan diluida en estos soportes que para las familias no resultaría tan valiosa su conservación, al contrario de lo que sucedería con esa foto positivada – el retrato – en la que el único e indiscutible protagonista es el escolar.

Sin embargo, transcurrido el tiempo, estos elementos jugarían un papel fundamental en la construcción de la memoria escolar colectiva, como productos fotográficos testimoniales capaces de encarnar un pasado y, al mismo tiempo, de evocar su memoria.

### *Conclusiones*

Para cerrar este trabajo debemos insistir y reiterar la idea ya expresada anteriormente en relación a que la historia y la memoria se mueven en registros diferentes o planos diferenciados. La memoria es algo presente y vivo, mientras que la historia «ya no existe», la analizamos, interpretamos y explicamos mediante los rastros o huellas que nos ha dejado. La memoria es una construcción, individual o colectiva, que se hace a partir de los recuerdos o imágenes del pasado, no necesariamente objetiva, y no siempre coincidente con la historia.

Partiendo de lo individual para llegar a lo colectivo, la memoria se va alimentando de los recuerdos que perduran y pasan de generación en generación, ayudados por toda clase de elementos, visuales, materiales o inmateriales, que tienen en común la condición de estar más o menos presentes en el día a día de las personas y las sociedades. Hablamos de edificios, monumentos, canciones, nombres de calles, plazas o pueblos, festividades, tradiciones y, cómo no, fotografías. Todos los elementos presentes en nuestras vidas, en nuestro entorno más inmediato, configuran, con su concurrencia continuada, nuestra memoria colectiva.

De la misma manera, la memoria escolar se construye también a través de los recuerdos que han perdurado en nuestra sociedad en forma de elementos tangibles o intangibles, pero siempre presentes en nuestro contexto y entorno. Uno de estos elementos es la fotografía escolar, o mejor dicho, algunos tipos de fotografía escolar. Algunas imágenes fotográficas relacionadas con la escuela pueden aportar más información que otras a la investigación histórica y, por lo tanto, pueden ayudar con mayor eficacia a interpretar el pasado de la institución escolar. Sin embargo, no siempre estas imágenes son las que más han contribuido a la construcción de la memoria escolar, por lo que la historia de la escuela y la memoria que tenemos de la misma pueden no coincidir totalmente, pues ambas se han construido en registros diferentes y a partir de elementos substancialmente distintos.

En este artículo se intenta poner en evidencia cómo determinados tipos de productos fotográficos relacionados con la escuela han incidido más que otros en la construcción de su memoria colectiva, también contemplada aquí la memoria institucional, y a la vez en la configuración de todo un imaginario escolar que no necesariamente debe coincidir con lo que nos cuentan las evidencias usadas para la investigación histórica.

Algunos de estos productos fotográficos en cuestión son los que se analizan en este artículo: los retratos de recuerdo escolar, las orlas, las fotografías de grupo y los anuarios escolares como almanaques fotográficos. Un estudio detallado de los mismos demuestra que no son precisamente el tipo de evidencias visuales que más información aportan al conocimiento histórico del pasado escolar, sin embargo destacan en nuestro imaginario colectivo por su histórica presencialidad. Este tipo de productos fotográficos, en mayor o menor medida, forman parte de nuestro contexto visual de manera habitual, pues pertenecen a lo que podemos llamar álbum familiar y/o social, entendido como el conjunto de fotografías propias y habituales en el entorno de las familias o de las comunidades.

Esta presencialidad es lo que hace que estos productos fotográficos, mucho más que otro tipo de fotografías escolares, se conviertan en elementos del recuerdo que están más presentes en la construcción de la memoria que otro tipo de elementos.

Todo esto nos lleva a una imagen de la escuela a veces estereotipada, custodiada por una sociedad en la que permanecen visibles y presentes determinados tipos de fotografías que no sólo configuran su memoria, sino que incluso a veces condicionan la interpretación de su historia. El mero hecho de delimitar qué fotografías se consideran escolares, y cuáles no, está a priori muy condicionado por lo que todos tenemos en mente cuando nos referimos a una fotografía escolar.

Creemos que tener en cuenta estas precisiones nos permitirá, por una parte, aprovechar mejor el potencial de las fotografías escolares como fuentes o testimonios históricos superando estereotipos que son fruto de la construcción

de la memoria. Por otra, esperamos haber aportado algunas ideas y sugerencias para el debate sobre la incidencia de determinados tipos de fotografías en la construcción de la memoria escolar.

# Non-Formal Education in Ukraine in early 20<sup>th</sup> Century: aspiring for better life or learning to live in crisis?

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**ABSTRACT:** The paper analyses the activities of children's organizations in the first decade of the 20<sup>th</sup> century. They were years marked by pressure of the weakening monarchy on raising democracy processes, and active political struggle and anticipating change. Differentiations in social stratification, earlier children's inclusion in community life are presented as factors resulting in emerging numerous children's organizations. They ranged from non-formal self-organized gangs of marginalized children to strictly structured political children's associations. They were powerful enough to draw attention of the government,

the church, political parties, as well as the army to the existing problem with the view to use their potential. The forms of their relations are presented with the emphasis on the ability of children's organizations to modify the further life of the children participating in them.

EET/TEE KEYWORDS: Children's organizations; Children's movements; Scout organizations; Ukraine; XX<sup>th</sup> Century.

### *Introduction*

The potential of non-formal education for children's socialization has been used worldwide. In the periods of cardinal changes within a nation and in a wider context its importance rises with the emphasis on political socialization making children's organizations an important tool of fostering young generation in a required mode. World's dictatorships have always kept young generation under the strictest control using propaganda and all possible means of imposing ideas. Soviet Union was one of the states which did most of it, which was the first step in growing obedient citizens of the state. This paper seeks to challenge the widespread opinion that children's organizations were purely a means of disciplining the young generation in order to make them obedient parts of the huge power mechanism.

#### *1. The roots of the children's movement*

The researchers do not have a unified idea of the children's organizations' roots and nature now; neither had they it in the first decades of the 20<sup>th</sup> century. Some researchers have stressed biological factors of children's movement, others – social. It might be attributed to the leading ideology of a certain historical period, and a certain country (oddly enough, for two decades around World War I Ukraine used to be part of the Russian Empire, Ukrainian People's Republic, and Ukrainian Soviet Socialist Republic of the USSR).

Soviet educationalists saw the main roots of the children's movement in what they called principal post-revolution changes in children-related policies compared to Russian imperial attitudes. Relying on undivided fusion of children's and youth movements they poetically described the process as «proletarian springs flowing together into a powerful movement»<sup>1</sup>.

<sup>1</sup> V.G. Yakovlev, *Vozniknoveniie detskogo kommunisticheskogo dvizheniia v SSSR* [Emergence of children's communist movement in the USSR], Moscow, OGIZ – Molodaia Gvardiia, 1933, pp. 3-4.

Russian researcher D. Vakker in her dissertation on Ukrainian pioneers (1958) stated:

Children's movement is an important part of the working class struggle for political ideas in the political and economic situation characterized by hard exploitation and pressure on children as a working force for capitalist tyrants, to say nothing of their illiteracy as before World War I school education was available only for 22-25 % children. As a result of the social and political situation caused by the so called Three Russian Revolutions children and youth actively joined in<sup>2</sup>.

It's quite evident that researchers of the Soviet time viewed the children's movement at a mono ideologist class angle. Modern researchers, on the contrary, have quite different ideas. For instance, the Ukrainian educationalist L. Aliyeva in her dissertation (2002) lays emphasis on «natural children's energy and their active response to the everyday issues»<sup>3</sup>, while A. Kyrpychnyk attributes it to social stratification, and the place of the child in the system of social relations<sup>4</sup>. In defining the main factors of the children's movement most authors state that it's an objective reality capable of self-development. The early 20<sup>th</sup> century added to its traditional adult elements, i.e. state and non-governmental organizations, quite unexpected but equally important children's groups<sup>5</sup>.

## 2. Objective factors of children's organizations emerging

Most Ukrainian and Russian researchers (M. Basova, I. Gordina, V. Lebedynskiy, F. Koroliov, M. Krupenina, Y. Kudriashova and others) classify objective factors of children's organizations as important actors of the early 20<sup>th</sup> century stage as historical, social, economic, political, cultural, and educational.

The decorations were presented against the background of Russian Empire as part of the world experiencing all the possible cataclysms: general crisis, Russian-Japanese War, World War I, two revolutions, ideological fights, to say nothing of the internal crisis in safety, economy, and state policies. It quite logically resulted in emerging organizations, parties, unions, societies, and

<sup>2</sup> D.L. Vakker, *Detskaya kommunisticheskaya organizatsiya yunyh pionerov im V. I. Lenina v Ukrainской SSR (pervoye desiatiletie sushchestvovaniya 1922-1932 gg.)* [Children's young pioneers' communist organization named by V.I. Lenin in Ukrainian SSR (first decade of functioning 1922-1932)], PhD diss., Moscow University, 1958, p. 16.

<sup>3</sup> L.V. Aliyeva, *Stanovleniye i razvitiye otechestvennogo detskogo dvizheniya kak subyekt vospitatelnogo prostranstva* [Formation and development of Russian children's movement as the subject of educational space], PhD diss., Moscow University, 2002, p. 21.

<sup>4</sup> *Detskoye dvizheniye: slovar-stravochnik* [Reference book for children's movement], s.v. «Children's movement».

<sup>5</sup> Aliyeva, *Stanovleniye i razvitiye otechestvennogo detskogo dvizheniya kak subyekt vospitatelnogo prostranstva*, cit., pp. 18-19.

any other synonym that can be used to call the group of people belonging to working class, peasantry, intellectuals, bourgeoisie etc (more than 70 political parties by 1917!). Progressive educationalists didn't keep in the background and used the chance to speak for democracy in education.

At the same time children felt the situation on their own skin, they worked full-time in agriculture, fishing, manufacturing, mining, and domestic service. Emerging educational services provided by the state and community also contributed to their becoming mature<sup>6</sup>. So, the situation itself filled in the gap between children and adults – they became closer in their interests.

That contributed to the fact that in Ukraine there was an indissoluble bond between adult and children's organizations. The principle idea was to make children proponents of the socialist idea no matter how hard the times were. Russian researcher Basov in his dissertation stated:

On the one hand, they were too young to influence anything; on the other hand, in some years the children were to join the adults in introducing new order. As a result, different political organizations, as well as the school, the church, the army exercised various methods of influencing children. So, the children's organizations that rapidly emerged had different objectives depending on the character and pattern of the institutions shaping them. Another important thing about children's organizations was that they were not purely formed to satisfy the children's need in games and quality leisure time activities – they were seeking social challenge<sup>7</sup>.

On the other side of the spectrum, World War I breathed life into antisocial criminal gangs coming from self-organized groups of homeless children who strove to survival. The state realized that the only way to put an end to their illegal actions was to take advantage of their childish energy, and exploit the situation<sup>8</sup>.

Early 20<sup>th</sup> century community needed new leaders who might be objective, creative, educated, firm in their spiritual and citizenship positions. Outside Ukraine, in Europe and the US in early 20<sup>th</sup> century there existed loads of religious, military, sports, and educational children's organizations. It was the time of the Boys' Brigade (BB) (Scotland, 1883), the Army Cadet Force (ACF) (England, 1860); Scout Movement (1903), Camp Fire Girls of America (the USA, 1910), The Children of the American Revolution (C.A.R.) (the USA, 1895), the Church Lads' and Church Girls' Brigade (England, 1978), the Young

<sup>6</sup> *Ibid.*, pp. 47-48.

<sup>7</sup> N.F. Basov, *Naukovedcheskiye aspekty issledovaniya istorii detskogo dvizheniya v Rosii: metodologiya, istoriografiya, istochnikovedeniye (nach. XX-90-e gg.)* [Scientific methods of researching the history of Russian children's movement: methodology, historiography, and sources (early 20<sup>th</sup> - 1990-s)], PhD diss., Moscow University, 1997, p. 72.

<sup>8</sup> Aliyeva, *Stanovleniye i razvitiye otechestvennogo detskogo dvizheniya kak subyekta vospitatelnogo prostranstva*, cit., p. 56.



Men's Christian Association (YMCA) (England, 1844) etc. Most of them are still active and have become powerful international organizations.

Thus, some ideas of the international children's movement were imported to Ukraine. These, as well as internal ideas supported by adult and youth unions influenced the foundation stones for children's organizations.

In its turn, children's movement became a considerable sociocultural phenomenon in many countries, which contributed to the development of theory and practice of education.

### 3. *The problems of Classification*

Ukrainian researchers consider early 20<sup>th</sup> century the most active time of emerging children's self-organized groups with their gradual turning into social partnership with adults. Childhood became an unusual phenomenon, active and directed at defending children's rights, as well as the whole community's interests.

Children's movement was presented by a wide variety of children's organizations with different priorities and different attitudes towards state power and adult world. Ukrainian researchers often oversimplified the spectrum of children's organization and underestimated their importance: firstly, by subdividing them only into two groups: scout and non-scout; secondly, by analyzing children's movement only after the revolution of 1917; thirdly, by paying attention only to the communist oriented organizations.

Thus, the 1917 organizations under their research fall into two categories: socialist (Socialist Youth Union, Pupils Internationalist Union etc.) and middle school pupil's movement in which 12-13 year-olds became a separate organization<sup>9</sup>.

Russian researcher M. Iordanski in his work *Organization of Children's Environment* (1925) all the variety of children's organizations subdivided into: school, non-school, adults aid organizations, and societies in the community. He attributed certain characteristics to them: all the forms of children's organizations were to emerge naturally, without external pressure, without any artificial influences, though he saw adults' impact as important<sup>10</sup>.

Now the approaches to classification differ. So, L. Orlova suggests two groups of early 20<sup>th</sup> century children's organizations: (1) the ones that followed adults' patters (Cabinet of Ministers, Labour Ministry, Justice Ministry, Public

<sup>9</sup> N. Mironov, *Iz istorii detskogo dvizheniya* [From the history of children's movement], Hkarkiv, State Publishing House of Ukraine, 1924, pp. 24-27.

<sup>10</sup> N.N. Iordanskiy, *Organizatsiya detskoy sredy* [Organisation of children's environment], Moscow, Molodaya Gvardiya, 1925, p. 27.

Education Ministry etc.); youth clubs, youth houses, as well as youth unions, such as May Union, Children's Socialist Union, Gymnastics Union, nationalist organizations, orthodox church groups, social and political clubs, first children's communist clubs, youth labour armies [yuntrudarmii], as well as children's internationals [dytinternatsional], councils of children deputies and children's communist party; (2) the ones based on the following of favourite books characters patterns, with the idea of a romantic game in which children pretend to be like a white good knight fighting for the better<sup>11</sup>.

Besides, L. Orlova mentions youth organisations with socialist and non-socialist ideals<sup>12</sup>.

M. Boguslavskiy, another Russian researcher, classifies children's organizations placing them on the two poles: club-like non-political organizations striving for peace and culture, and communist-oriented organizations, like Children's Proletarian Culture [Proletkult] close to communist party<sup>13</sup>. Around 1917 they were politically biased that can be attributed to the current political situation as well as to great many political parties with the bolsheviks' one growing more and more influential. As a result, in spite of the variety of children's organization all of them, according to M. Boguslavskiy may fall into two categories: unaffiliated scout movement and children's communist movement with its two main variants: Young Communists and Young Spartacuses. Their common characteristic was that they all worked out-of-school<sup>14</sup>.

The authors of the Russian edition of *Children Movement Book* (Moscow, 2005) classify children's organizations by their main purposes into scout and pupils' movements, clubs, environmental protection groups, charity funds, patriotic unions etc.<sup>15</sup> Some authors (V. Lebedynskiy, O. Sorochynska) classify children's organizations in terms of ideology. Thus they speak of democratic, socialist, religious, scout organizations. Others classify them in terms of key activities and define patriotic, sport, culture, ecology, labour, economy ones.

But in spite of the fact that researchers differ in criteria, terminology, age differentiation they see children's movement as a complex unique phenomenon with particular rules and laws of its development.

<sup>11</sup> L.N. Orlova, *Detskoye protopoliticheskoye obshchestvennoye dvizheniye v usloviyakh transformatsii Rossiyskogo obshchestva: osobennosti i priority* [Children's protopolitical public movement under the conditions of Russian society: characteristics and priorities], PhD diss., Oriol, 2002, p. 57.

<sup>12</sup> *Ibid.*, p. 60.

<sup>13</sup> M.V. Boguslavskiy, *Detskoye dvizheniye v Rossii: mezhdru proshlym i budushchim* [Children's movement in Russia: between the past and the future], Tver, Nauchnaya kniga, 2007, p. 28.

<sup>14</sup> *Ibid.*, pp. 28-29.

<sup>15</sup> *Detskoye dvizheniye: slovar-spravochnik* [Reference book for children's movement], s.v. «Children's organisation».

#### 4. *Children's organizations and their main activities*

We are going to have a closer look at children's organizations following the format of classification by their activities as other formats (nationality, place, funding etc.) are unlikely to serve good criteria for defining groups within children's movement which is self-organized and independent. As a result, afterschool clubs and circles do not go in line with our research as they are not self-organized.

To find the most substantial characteristics, common and distinctive features in the activity of the children's movement, we characterized the most typical ones within each type. Also, together with Ukrainian organizations, we paid attention to Russian ones, as they had the same historical roots; their activity was characterized by interaction, but they surely had their own peculiarities.

##### *Cultural and educational children's movement*

The first type – cultural and educational children's movement – was presented, mostly, by secret pupils' organizations created for current school system improvement and other school-related NGOs. Especially active was the pupil's movement before the two revolutions of 1905 and 1916, that was presented by pupil's circles of different directions: self-educational, cooperation and even terrorist, often being illegal, where 9-to-19-year-old members played underground games. In the history of pupil's movement, there was a period of decline, which is connected with the events of 1905, when out of school inspection was established. Nevertheless the revolutionary movement growth before the war influenced pupils' public life: various 'innocent' circles grew overnight and even became legalized.

In the book *From the History of Children's Movement* Mironov explained:

Schools experienced a liberal period which contributed to children's movement intensification. Their activities were targeted at resolving conflicts with school teachers and administration, preparing monitor's elections, criticizing the way history was taught etc. The circles were in opposition to schools of those days, and the opposition united their members and revolutionized the mind. With time, they became more socially-orientated and even politicalized, and had a lot of features parties had<sup>16</sup>.

A typical example of such an organization was Kyiv Pupil's Circle (the so called KUK – Kievskiy uchenicheskiy kruzhok) founded by middle school pupils in autumn 1915. Then it was reestablished in Middle School Pupils' Movement. It published a newspaper «Middle School Voice», which was extremely popular

<sup>16</sup> Mironov, *Iz istorii detskogo dvizheniya*, cit., p. 20.

with school youth. In autumn 1916 it split as all its non-political members left it. Then the circle's activity was closely connected with Bolsheviks and the Socialist Revolutionary Party. Contradiction between the two parties led to the organization's decay and a sort of lull before the storm.

The Middle School Pupils' Movement was really widespread in Ukraine having its organizations in Kharkiv, Kyiv, Odesa and other cities. It was often supported by teachers after February Revolutionary events<sup>17</sup>. In summer 1917 there was even the all-Russian Congress where Ukrainian delegates also actively participated. So, M. Myrovov from Kyiv Pupils' Circle presented the programme of secondary school democratization in which they suggested refusal from grades, supervisors, inspectors, pupils' representatives in school boards, pupils' monitors, cooperative learning etc. Nevertheless, no real decisions were taken by the Congress, no changes introduced. The Congress even failed to unite regional departments.

By the end of 1917 they had become more active and gradually declined for two lack of support from adult organizations busy with involving youth into politics. That accounts for the fact that spontaneous children's movement was not strong enough to survive<sup>18</sup>.

At that time in Ukraine emerged a number of culture-oriented children's and youth organizations which were later characterized by Soviet ideologically forced educationalists as counter-revolutionary ones trying to «distract youngsters from political class struggle»<sup>19</sup>.

The examples of the above mentioned organizations might be Youth House [Budynok Yunatstva] (Zaporizhzhia, 1917-1918), youth groups Museum [Muzei] (Starobilsk, 1918), Labour and Light [Trud i Svet] (Katerynoslav, Kostiantyniv, May 1917-July 1918), Organization of Jewish Working Youth, Lighthouse Organization [Mayak] (in a number of Ukrainian towns), Youth Revolutionary International [MoRevInt – Molodizhnyi revoliutsiynyi internatsional] (Odesa, 1918), sports organizations, artistic groups, Jewish Maccabis and others<sup>20</sup>.

### *Children's organizations supporting socialist ideas*

The other type of children's organizations is presented by the ones supporting socialist ideas. They actively joined adults in early 20<sup>th</sup> century strikes, 1905

<sup>17</sup> Vakker, *Detskaya kommunisticheskaya organizatsiya yunikh pionerov im V. I. Lenina v Ukrainskoy SSR (pervoye desiatiletiye sushchestvovaniya 1922-1932 gg.)*, cit., p. 25.

<sup>18</sup> Mironov, *Iz istorii detskogo dvizheniya*, cit., pp. 24-27.

<sup>19</sup> Vakker, *Detskaya kommunisticheskaya organizatsiya yunikh pionerov im V. I. Lenina v Ukrainskoy SSR (pervoye desiatiletiye sushchestvovaniya 1922-1932 gg.)*, cit., p. 32.

<sup>20</sup> *Ibid.*, pp. 32-36.

revolutionary events in all the regions of Ukraine. The Youth Movement Journal in 1931 presented a series of articles called Chronicle of 1905 Youth Movement. The articles presented a strike of steam-boiler cleaners and Cow's children<sup>21</sup> (Odesa, May, 1905), a strike of shop-boys (Katerynoslav, July 3-5, 1905), a strike of workers supported by schoolboys (Shostka, December 16, 1905), peasant youth and children strikes (Vaasylivka, Lebedyn District, May 1905) etc.<sup>22</sup> There were a great many youth strikes a few years after: adolescent glass workers' strike supported by 1600 13-to-16-year-olds (April 26, 1912), Yakovlev's printer's devils' strike (November 5, 1915), 1<sup>st</sup> Kyiv Jewelry apprentices' strike (1915)<sup>23</sup>.

The same type was represented by children's socialist clubs. The first one in Soviet Russia appeared in Kostroma in November 1917 with about a hundred children membership, and in some months there were 11 suchlike clubs in Kostroma quickly spreading to other cities and villages. According to their statutes all the clubs were targeted at socialist politics.

As it turned out they were predecessors of the pioneers' organizations that started in 1923. In spring 1920 after 9<sup>th</sup> Russian Communist Party congress decision about 'mobilization of the masses to the labour front' children supported adults by forming Youth Labour Armies and Children Labour Armies. Members of the Youth Communist League also the faced the task 'to fight at the labour front', but as they were already 'fighting' at their regular place of employment they could only join in at weekends. There were Youth and Children's Labour Armies headquarters in Kyiv, Poltava, Kharkiv and other cities. Bigger organisations in Kyiv and Kharkiv counted up to 1,000 members, smaller ones (like in Poltava) – up to 500 members<sup>24</sup>. They were engaged in voluntary unpaid work on days off (the so called «subotniks») carrying wood, cleaning tracks, streets, demolishing ruins etc. This way they acquired some experience of work for the community<sup>25</sup>. Organizational structure rested on two key principles. On the one hand, it was grounded on democracy in everyday life, self-management and independence. On the other hand, it was based on military order and strict discipline, controlled by commanders and labour instructors. Though the work outcomes were quite low, such organizations had a great potential for political socialization. As a result, they were supervised by

<sup>21</sup> Cow was their employer's nickname.

<sup>22</sup> Vakker, *Detskaya kommunisticheskaya organizatsiya yunyykh pionerov im V. I. Lenina v Ukrainskoy SSR (pervoye desiatiletiye sushchestvovaniya 1922-1932 gg.)*, cit., pp. 27-29.

<sup>23</sup> *Ibid.*, pp. 27-31.

<sup>24</sup> V.A. Kudinov, *Bolshiy zabyty malenkiykh grazhdan* [Big cares small citizens], Moscow, Molodaya Gvardiya, 1990, p. 47.

<sup>25</sup> V.V. Khizhniakov, *Kooperatsiya v shkole* [Cooperation at school], Moscow, Tsentralnoye Tovarishestvo Kooperativnoye Izdatelstvo, 1925, p. 38.

members of the Youth Communist League<sup>26</sup>. When Polish troops entered Kyiv Youth and Children's Labour Armies were dismissed<sup>27</sup>.

Even though they proved children's aspiration for better life, desire to help adults in introducing revolutionary ideals. They also proved that if children realize social importance of their work they can be well organized with the aid of games, air of romance, and rituals.

### *Children's communist movement*

Another typology group was formed by children's communist movement – children's communist groups engaged in building 'new communist culture'<sup>28</sup>. They were communist unions named by Spartacus, Children's Communist Party, Children's Proletarian Culture Organization [Proletkult], Young Pioneers Sports Club, Sowing Committee [Posivkom], Children's International, Children Deputies Council etc.

Children's Communist Party as well as Children's Proletarian Culture Organization [Proletkult] were initiated by Tula Regional Society for Proletarian Culture in February 1919. They aimed at educating children of workers of weapons and sugar plants, as well as helping them survive in the time of starvation. The main purpose of Children's Proletarian Culture Organization was «to breed a proper communist devoted to the working class matter, to foster a brave, fearless, persistent campaigner for the revolution»<sup>29</sup>. The Organization was rapidly growing: in 1919 there were 800 members while in 1920 there were more than 3,000. In spring 1919 it gave start to Children's Communist Party publishing its own newspaper called Children's Proletkult. The Party resembled the adult one in everything: in meetings, reports, political classes, reading communist literature etc. But it soon became quite evident that the initiative with no romance, with the ideals that were too far from real life changes was exhausted. In their turn, adults were annoyed by the children intruding into political and economic life. As a result, on December 15, 1920 Children's Communist Party was dismissed, as well as Children's Proletkult 8 months later<sup>30</sup>.

Sowing Committees (the so-called Posivkoms) were initially organized for helping to sow seeds in orphanages. But in process of doing it they united

<sup>26</sup> Mironov, *Iz istorii detskogo dvizheniya*, cit., p. 32.

<sup>27</sup> Kudinov, *Bolshiye zaboty malenkikh grazhdan*, cit., p. 47.

<sup>28</sup> *Partiya, komsomol i detskoye dvizheniye: sbornik* [Party, Young communist League and Children's movement: selection of papers], Moscow, Molodaya Gvardiya, 1990, p. 35.

<sup>29</sup> Kudinov, *Bolshiye zaboty malenkikh grazhdan*, cit., p. 41.

<sup>30</sup> *Ibid.*, pp. 41-47.

politically minded children who were interested in communist literature, thus turning into political organizations.

### *Ukrainian Scout Organizations*

One more typology group embraced Ukrainian Scout Organizations (the so-called Plasts), that started in 1911 in Western Ukraine on the bases of secret circles at Lviv Grammar School. In Central Ukraine they developed from Young Cossacks secret organization called Zaporizhzhia Sich in Kamyanyets-Podilsky Theological Seminary in 1895<sup>31</sup>.

In Russian Empire the first scout organizations appeared in 1909 and by 1917 there were up to 120 unions with 20,000 members<sup>32</sup>. Ukrainian researcher of the scout movement V. Okarynskyi who had a chance to interview eyewitnesses of its emerging states that the first Ukrainian scout group that dates back to 1909 was in Bakhmut District in Katerynoslav Region. He states:

Grammar schools and professional colleges students, as well as working class children might be its members unlike Russian scout organizations that were elite in their character. With World War 1 outburst Ukrainian scouting got Russian imperial manner<sup>33</sup>. Classical activities like different excursions, trips, walking tours, helping people in need still remained. In 1915 in Kyiv there were two organizations of the kind: Young Scouts Brigade of Kyiv Educational District [Druzhyna Yunykh Razviedchikov Kiyevskago Uchebnago Okrug] and the First Kyiv Young Scouts Detachment [Pervyi Kiyevskiy Otriad Yunykh Razviedchikov]. Besides, O. Anokhin's textbook titled *Young Scout Companion* [Suputnyk Yunogo Rozvidnyka] was published in Kyiv in 1915. It was followed by emerging Girl Scouts organization with the principal activities dealing with raising children, culinary, housekeeping etc. Boy and Girl Scout Movement spread to Odesa, Katerynoslav, Oleksandriv, Kharkiv, Zhytomyr, Katerynodar, Chernihiv, Bila Tserkva, Vinnytsia, Kanev and other cities. Soon scouting became school-based reaching its peak in 1917-1920, that is in the time of Ukrainian People's Republic.

All in all in 1917-1920 there were nearly 150 cultural and educational periodicals out of which 56 were youth and 12 – scout-oriented. The published materials gave evidence to reinforce the importance of youth organizations for political socialization<sup>34</sup>.

<sup>31</sup> V.M. Okarynskyi, *Ukrainskyi skautskyi rukh (1911-1944 rr.)* [Ukrainian Scout Movement], PhD diss., Kyiv University, 2001, p. 38.

<sup>32</sup> Aliyeva, *Stanovleniye i razvitiye otechestvennogo detskogo dvizheniya kak subyekta vospitatelnogo prostranstva*, cit., p. 60.

<sup>33</sup> Okarynskyi, *Ukrainskyi skautskyi rukh (1911-1944 rr.)*, cit., p. 40.

<sup>34</sup> Y.N. Sorochinskaya, *Detskoye dvizheniye v sovremennom obshchestve: uch. posobiye*

Nevertheless, in October 1919 scouting was blamed for bourgeois ideas and being apolitical, and liquidated in 1920, though some brigades lasted 2-3 years after that.

### *Conclusions*

The article has presented the roots of the children's movement as they were described in Russian and Ukrainian research in soviet period, as well as some new ideas of its emerging which can be attributed to modern authors. The objective factors of children's organizations emerging have been shown at different angles. Different ways of children's organizations classification have been paid attention to with the activity-related one being chosen for their further characteristics. Thus, cultural and educational children's movement, children's organizations supporting socialist ideas, children's communist movement, and scout movement were presented through their main activities. Each group functioning was a bright picture of the way children's organizations were used to satisfy the adults' need in changing political order. Nevertheless, once children became autonomous and creative, they couldn't be kept under control, and as a result, the organizations stopped getting assistance from adults, and later were prohibited.

So, along with soviet ideas came the monopoly of two main children's and youth organizations – Young Pioneers and Young Communist League that brought up several generations of Soviet people, believing in communist ideals, ready to accept totalitarian regime, resistant to changes and development. Non-communist ideas together with multiple pluralist non-governmental organizations went underground and abroad along with few protesters and emigrants.



# Web 2.0, social networks and the history of education in Spain: creating a scientific collaborative space (HistoEdu.net)\*

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**ABSTRACT:** In recent years, there have been many projects and experiences trying to exploit the possibilities that Web 2.0 can offer, not only in terms of research but also for teaching and learning processes in different fields of the human knowledge. This article discusses its implications for the community of educational historians in Spain, as it reviews the main contributions since the beginning of the 21<sup>st</sup> century up to the most recent creation of a scientific historical-educational collaborative space or social network HistoEdu.net

**EET/TEE KEYWORDS:** Social network; Scientific collaborative space; Online working; History of Education.

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## Introduction

In recent years, we have seen a great expansion of projects and experiences trying to explore and exploit the possibilities that Web 2.0 and social networks offer not only for research but also for teaching and learning processes in different areas of the human knowledge and different educational spheres, being the university field not an exception<sup>1</sup>. In this article we review its implications in the scientific community of educational historians in Spain, as we discuss the main contributions developed since the beginning of the 21<sup>st</sup> century, mainly focused on the possibilities that Information and Communication Technologies (ICT) offered and still offer for teaching the history of education, as well as for spreading among a wider audience the historic educational legacy. The possibilities that Web 2.0 and social networks offer nowadays, to which the scientific community of educational historians have not been unaware, contemplated the convenience of taking a step forward, from the landmarks achieved in the last five years, giving shape to what is been known as a history of education 2.0 where researchers, teachers and students alike could share information, interact and create knowledge as they make the most of the possibilities Web 2.0 offer, characterised by the interactive sharing of information, a design focused on the user and the collaboration in the World Wide Web, as it was defined by Tim O'Reilly<sup>2</sup> back in the day. With this objective in mind, and as a result of an inter-university and inter-disciplinary research program, a new virtual space of scientific historic-educational virtual space has been set in motion, specifically for researchers, teachers, students and all of those interested in our educational past (the social network HistoEdu.net)<sup>3</sup>.

<sup>1</sup> J. Cabero, V. Marín, *Posibilidades educativas de las redes sociales y el trabajo en grupo: Percepciones de los alumnos universitarios*, «Comunicar: Revista científica iberoamericana de comunicación y educación», vol. 21, n. 42, 2014, pp. 165-172; C. García, M.C. Navarrete, M.C. Ancona, *Las comunidades de aprendizaje y redes sociales en las universidades*, «Etic@net», nn. 13-14, 2013, pp. 86-93; A. Gewerc, L. Montero, M. Lama, *Colaboración y redes sociales en la enseñanza universitaria*, «Comunicar: Revista científica iberoamericana de comunicación y educación», vol. 21, n. 42, 2014, pp. 55-63; J. Gonzalo, W. Laser, E. Adrián, *El uso de redes sociales por parte de las universidades a nivel institucional. Un estudio comparativo*, «Revista de Educación a Distancia», n. 32, 2012, pp. 1-38: <[http://www.um.es/lead/red/32/laaser\\_et\\_al.pdf](http://www.um.es/lead/red/32/laaser_et_al.pdf)> (last accessed: July 14<sup>th</sup>, 2014); C. Islas, M.R. Carranza, *Uso de las redes sociales como estrategias de aprendizaje ¿Transformación educativa?*, «Revista Apertura», vol. 3, n. 2, 2011: <<http://www.udgvirtual.udg.mx/apertura/index.php/apertura3/article/view/198/213>> (last accessed: July 14<sup>th</sup>, 2014).

<sup>2</sup> T. O'Reilly, *What is Web 2.0: Design Patterns and Business Models for the Next Generation of Software*, <<http://oreilly.com/web2/archive/what-is-web-20.html>>, Last Update: September 30<sup>th</sup>, 2005 (last accessed: July 14<sup>th</sup>, 2014).

<sup>3</sup> *Patrimonio educativo 2.0: Personal Learning Network of Education Heritage*, Ref. GV/2013/089 In the group of emergent research there are teachers of the history of education field, theory of education and technology of education from the university of Valencia (UV), Sevilla (US), Murcia (UM) and Islas Baleares (UIB). Main researcher: Andrés Payà Rico (UV). Researchers: Pablo Álvarez Domínguez (US), Isabel Gutiérrez Capel (UM), Santiago Mengual

### 1. *Internet, social networks and historians 2.0: an approach*

The emergence of computers in the second half of last century, and the presence of what have later been known as Information and Communication Technologies (ICT) in our everyday lives has grown exponentially as years went by, up until now along with their development. History has not remained unaware of the possibilities that computers and ICT offered for historians and researchers alike. As an example of the initial use of computers, we might mention the use of automatic calculation systems to deal with a large series of numerical data and obtain statistical indicators about the chronological evolution of historical phenomena, or even economic and demographic, etc. In point of fact, it was the French Annales School of Historiography who assumed that the practice of a quantitative and serial history was lawful, and this idea has been taking hold from the 60's, supported by the calculations obtained with computers<sup>4</sup>.

On the other hand, beyond the possibilities that computers provided for historians since the second half of last century in order to shape a quantitative and serial history, it is widely known that, in the academic sphere, they have also revolutionised the communication between people and the information finding process, documentation, bibliographic references, etc. for researchers. Backtracking its origins, communication using computers can be traced back as early as the '60s in the 20<sup>th</sup> century due to a military initiative in the United States, being subsequently transferred to universities and centres or research institutes. This network would later become the so-called Internet, of academic use, based on a standard communication protocol known as TCP/IP. In this network, different methods and procedures were introduced in order to facilitate how data is sent and received, handle computers remotely, as well as other means of specialised communication. In the early '80s of the 20<sup>th</sup> century and through this telematic network, electronic mail or email began to be used (with the SMTP service) among the users in the university and research centres. It allowed access to financial data stored in remote computers known as servers where specialised information or computer programs were provided, with a public or restricted access to authorised users through file transfer protocols (FTP). Although the true revolution came when the Internet opened to a widespread use, both commercial and private, overcoming the strictly American university sphere where it had been born and where it remained. At the same time, easier representation and transfer methods of information were developed, such as the World Wide Web service (WWW) based on

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<sup>4</sup> F. Fernández Izquierdo, *Archivos, bibliotecas, redes sociales, blogs, Twitter... Tecnologías de la información al servicio del historiador modernista en la Web 2.0*, in E. Serrano Martín (coord.), *De la tierra al cielo. Líneas recientes de investigación en Historia Moderna*, Zaragoza, Institución «Fernando el Católico», CSIC, Diputación de Zaragoza, 2013, pp. 109-158.

the codification language HTML, which was set into motion with the first graphical web browser Mosaic in the early '90s, rendering the communication between data servers easier and integrating all of the independent services into the same computer application<sup>5</sup>.

This first stage of networking has been known as Internet 1.0 or Web 1.0 and features the predominance of search terminals, servers, etc. whose web-masters provide the users and readers with information in different digital format and in such a static manner similar to how television, radio or journal broadcasters reach their audience. Net services have exponentially grown since then, due to the evolution of communication and the rising numbers in data flow, the development of highly powerful and versatile computer hardware and the increase of open communication protocols that facilitate the interconnection with the resources. Furthermore, the speed improvement in data dealing and transfer through telematic networks has managed to overcome the first limited data delivery. Although they were originally limited information packages, nowadays it is feasible to obtain a supply of bulky packages in bytes containing images, videos, etc. For instance, library or newspaper section catalogues only sent the text of their descriptive sheets with the localisation of the newspaper, book, article, image, etc. and now they offer their full contents<sup>6</sup>. All the same could be said about scientific publication databases or online documentary repertoires that allow for an easy access of full texts. The digital edition, being one of the main reasons why paperbound editions have become more and more scarce, is deeply changing the publishing and journalistic world, and it has had consequences in the university sphere regarding the divulgation of scientific studies through digital magazines indexed in both national and international documentary repertoires. It makes us think that in the foreseeable future there will be an increasing edition of free online accessible digital scientific journals or with an upfront payment, contrary to traditional paperbound editions, in which the focus is not on the complete journal but on the articles themselves considered as independent unities, with their corresponding DOI, easily accessible from journal databases, documentary repertoires, etc. facilitating their search and accessibility by those interested in them.

We have seen in recent years how these new means of communication have flourished on the Internet, formerly known as Web 2.0 in 1999 becoming popular among us in 2004, when information becomes immediate, decentralised and interactive<sup>7</sup>, as it changes the traditional means of transmission of general research results, of the historians in general and educational historians in particular. The initial Internet, or Web 1.0, was based on the contents that

<sup>5</sup> Fernández Izquierdo, *Archivos, bibliotecas, redes sociales, blogs, Twitter... Tecnologías de la información al servicio del historiador modernista en la Web 2.0*, cit.

<sup>6</sup> *Ibid.*

<sup>7</sup> A. Martínez, *Món 2.0*, «Time Out Cultura», n. 8, 2011, pp. 10-16 and O'Reilly, *What is Web 2.0: Design Patterns and Business Models for the Next Generation of Software*, cit.

their makers, administrators or webmaster offered in a static manner to those who wished to consult them, similarly to those readers who wish to consult a book, magazine or journal. In this environment, still present in the network, the flow of information goes from one person to many. Web browsers, such as the primitive Mosaic, Netscape or the evolved Explorer, Mozilla, Google Chrome, etc., have managed to give access to websites integrating texts, graphics and any type of digital files or materials requiring specific applications to handle them, which have been incorporated as add-ons in the browsers themselves. The transition from an initial and hierarchical network with static websites that continues to live on in its design, to the Web 2.0, with which it coexists, offering more interaction and collaboration possibilities among users, designs focused on them, participative sharing of information, etc. and as a result, the increase of linked services such as blogs, wikis, social networks (personal, professional and academic), spaces where resources can be shared, such as documents, videos, pictures, news feeders, online storage, presentations, educational platforms, etc., which have contributed to the creation of user generated content. As an example, many people selflessly collaborate on open access collective initiatives as popular as Wikipedia, pushing paperbound encyclopaedias that have existed since the 18<sup>th</sup> century into the background, or blogs about varied information, among which there are many appealing historians in general and educational historians in particular, frequently visited and with a large number of interactions<sup>8</sup>.

There is a wide array of tools available to users on the internet, to manage the different elements, not only based on written text, that allows for an interaction among users. On top of that, it is worth mentioning the accessibility from any mobile and portable device, such as smartphones, tablets, etc., that renders the use of a computer unnecessary. We live in a world linked to the network where the interaction with other users through sharing spaces, wikis, blogs and social networks is part of our daily lives. Different institutions and academic experiences with informative or teaching purposes make use of these globalised social networks such as Facebook or Twitter. An increasing number of teachers and researchers in the university field, about thirteen million, have profiles in specifically academic social networks such as ResearchGate or Academia, where they not only share their publications with the rest of the community, but also promote debate or forums open to the community in both sites. On ResearchGate, they can even set up joint online projects thanks to the possibilities offered by the above-mentioned scientific social network as a professional tool

<sup>8</sup> Fernández Izquierdo, *Archivos, bibliotecas, redes sociales, blogs, Twitter... Tecnologías de la información al servicio del historiador modernista en la Web 2.0*, cit.

for collaborative work with users from practically any scientific and knowledge discipline<sup>9</sup>, among which there is an increasing number of historians, mainly anglo-saxon.

The changes the Web has undergone in recent years in order to become a Web 2.0 has opened a wide array of possibilities that have been specifically used in teaching, at all levels, in different fields or academic disciplines. We already have an increasing number of experiences that make use of ICT in a non-specific manner in teaching, and in recent years, the possibilities of social networks have been specifically explored in the creation of teaching a learning environment. For instance, in Italy, Project SONNA is analysing the impact of social networks and multimedia interactive multimedia games as learning tools in the process of training future health professionals<sup>10</sup>. Other experiences unrelated to the teaching process, such as Project APTIC in Spain, have explored the possibilities of designing a social network for a specific collective, in the health field as well, with an open code and through collaborative work among organisations and individual users, although the research group promoting the initiative ended up opting for opening the specifically designed social network to other already existing social networks or resource sharing environments such as Facebook, Twitter and Youtube<sup>11</sup>. This seems to be a constant in the different projects carried out in this line of work, because they have a major visibility, accessibility, participation and interaction for users since they are widely used well-known tools. Furthermore, an increasing number of researchers have been analysing the use of social networks by universities on an institutional level, and their possibilities for teaching in such institutions<sup>12</sup>. About the possibilities of social networks for history in general, many analyses have been recently published on the possibilities of social networks for university training of future historians, teachers and researchers<sup>13</sup> from different perspectives. In Spain, we have an ever increasing number of universities teaching experiences in the field of history, both general and sectorial, integrating or exploring the possibilities of social networks widely used among students in order to render

<sup>9</sup> I. Valladolid, *ResearchGATE, un facebook para científicos*, Naukas, <<http://naukas.com/2010/11/12/researchgate-un-facebook-para-cientificos/>>, Last update: November 12, 2010 (last accessed: July 14<sup>th</sup> 2014).

<sup>10</sup> M. Carrozzino, C. Evangelista, R. Brondi, C. Lorenzini, M. Bergamasco (edd.), *Social Networks and Web-based Serious Games as Novel Educational Tools*, «Procedia Computer Science», n. 15, 2012, pp. 303-306.

<sup>11</sup> B. Gómez Zuñiga, B. Nafría, N. Guillamón, M. Armayones, E. Hernández-Encuentra, G. Ontiveros, A. Bosque (edd.), *APTIC. Desarrollando una Red Social. Del 2.0 a las Herramientas de Medios Sociales*, «RevistaeSalud.com», vol. 7, n. 26, 2011, p. 3.

<sup>12</sup> Gonzalo, Laser, Adrián, *El uso de redes sociales por parte de las universidades a nivel institucional. Un estudio comparativo*, cit.; Islas, Carranza, *Uso de las redes sociales como estrategias de aprendizaje ¿Transformación educativa?*, cit.; Gewerc, Montero, Lama, *Colaboración y redes sociales en la enseñanza universitaria*, cit.

<sup>13</sup> G. Mitidieri, *TIC en el aprendizaje de la historia: utilización e historización de estas herramientas en el capitalismo cognitivo*, «Clío & Asociados», n. 16, 2012, pp. 195-208.

these teaching and learning processes more participatory and cooperative. As an example we can see recent experiences such as the use of Twitter in teaching economic history at the University of Oviedo<sup>14</sup>, or the creation of a Personal Learning Environment (PLE) at the same university in teaching Spanish as a Foreign Language, an easy to use tool for both teacher and student where social networks and widely used sharing resources environments are integrated<sup>15</sup>. Beyond these examples, let us analyse how the repercussions of ICT are felt among the scientific community of historians in the education in Spain, on teaching, research and diffusion of historic and educational heritage as we briefly go over the main initiatives carried out until the creation of a scientific collaborative space or HistoEdu.net historic-educational social network.

## *2. Web 2.0 and the history of education in Spain: precedents and previous projects*

In order to outline the precedents and previous projects for the creation of a scientific collaborative environment or historic-educational network in Spain on the history of education in our country and the use of the possibilities Internet has to offer in recent years, we should briefly go over some testimonies and experiences shared in our recent past.

In Spain, our scientific community has been progressively assimilating ICT and the Internet into teaching and research alike. We can see many precedents in teacher's comments in our academic sphere about the possibilities that the age of information and knowledge provided for the history of education, and how these possibilities have exponentially grown due to the Web. In 2003, Isabel Miró warned of the possibilities of the so-called network about the documentary hubs located therein<sup>16</sup> and Luís Miguel Lázaro outlined how the field of educational science would be boosted by the widespread use of communications technology, focusing on the history of education<sup>17</sup>. That same year, Miguel Somoza and Gabriela Ossenbach, within the XII Standing

<sup>14</sup> M.A. López Zápico, J. Tascón Fernández, *El uso de Twitter como herramienta para la enseñanza universitaria en el ámbito de las ciencias sociales. Un estudio de caso desde la historia económica*, «TESI. Teoría de la Educación. Educación i Cultura en la Sociedad de la Información», vol. 14, n. 2, 2013, pp. 316-345.

<sup>15</sup> P.M. Morán López, *La enseñanza de historia en el aula de ELE: construcción de un PLE adaptado al profesorado poco experto*, «Historia y Comunicación Social», vol. 18, December special issue, 2013, pp. 587-599.

<sup>16</sup> I. Miró, *Les noves tecnologies al servei de l'ensenyament de la història de l'educació*, «Educació i Història. Revista d'història de l'educació», n. 6, 2003, pp. 240-244.

<sup>17</sup> L.M. Lázaro, *L'accés a les fonts a la història de l'educació a través de les noves tecnologies de la informació*, «Educació i Història. Revista d'història de l'educació», n. 6, 2003, pp. 245-264.

Conference for the History of Education, linked Internet and the history of education with the pedagogic museums and the educational heritage via a study on the presence of school museums on the Internet as educational heritage exhibitions<sup>18</sup>. As a result of this growing interest in recent years about the possibilities of the Internet among the scientific community of education historians and researchers of the educational heritage in Spain, many studies were presented, such as the research conducted by MUPEGA on educational museums on the Internet<sup>19</sup>. Other experiences can be found, for example, in the project MANES with a virtual exhibition to celebrate the 400<sup>th</sup> anniversary of the publication of *El Quijote*<sup>20</sup>. On the other hand, Paulí Dávila and Luis M. Naya in 2005 and within the XXIII Standing Conference for the History of Education, put stress on the constant progress and blooming of websites related to history of education<sup>21</sup>. In order to compensate for some deficiencies detected by these authors, such as the absence of online databases and with the aim of encouraging general access to information and documents, they created a program for history of education in the Basque Country, a project that was perfected over time until it became the Documentation Centre for the History of Education in Euskal Herria<sup>22</sup>. In 2006, Julio Ruiz Berrio, president of the Sociedad Española para el Estudio del Patrimonio Histórico-Educativo, in a monographic for the inter-university journal «Historia de la Educación» on new educational history tendencies, confirmed the development and implantation of ICT in our academic and scientific field and the resulting transformation that occurred and would later occur in educational museology<sup>23</sup>.

In the recent history of Spain and as a result of I+D+I research projects on a national and autonomous level, there have been museum initiatives essentially virtual about the educational heritage linked to the development of the studies on the historic-educational heritage as an emergent field of investigation on the history of education<sup>24</sup>. We find an example in the Museo Didáctico

<sup>18</sup> M. Somoza, G. Ossenbach, *Internet y museos pedagógicos*, in R. Calvo *et al.* (coord.), *Etnohistoria de la escuela*, Burgos, Universidad de Burgos, SEDHE, 2003, pp. 901-914.

<sup>19</sup> V. Peña (dir.), *Os museos da educación en Internet*, Santiago de Compostela, Xunta de Galicia, MUPEGA, 2004.

<sup>20</sup> T. Rabazas, *El Quijote en la escuela. Exposición virtual de MANES*, «Boletín informativo SEPHE», n. 1, 2006, pp. 34-36.

<sup>21</sup> P. Dávila, J. Garmendia, L.M. Naya, I. Zabaleta, *Un recurso de Internet para la historia de la educación en Euskal Herria: euskalhezkontza.info*, in P. Dávila, L.M. Naya (coord.), *La infancia en la historia: espacios y representaciones (II)*, San Sebastián, Erein, SEDHE, pp. 555-563.

<sup>22</sup> P. Dávila, L.M. Naya, *El Centro de Documentación de Historia de la Educación en Euskal Herria en Internet: una experiencia innovadora*, «Cuadernos de Historia de la Educación», n. 6, 2009, pp. 111-123.

<sup>23</sup> J. Ruiz Berrio, *Historia y museología de la educación. Despegue y reconversión de los museos pedagógicos*, «Historia de la Educación. Revista Interuniversitaria», n. 25, 2006, pp. 271-290.

<sup>24</sup> E. Colleldemont, *Los museos virtuales de educación en España*, en J. Ruiz Berrio (ed.), *El patrimonio histórico-educativo. Su conservación y estudio*, Madrid, Biblioteca Nueva, 2010, pp. 275-293; X. Motilla, *La conservació i l'estudi del patrimoni historicoeducatiu a Espanya en*



Virtual del Patrimonio Histórico-educativo Andaluz<sup>25</sup>, under the management of the Museo Pedagógico Andaluz, created within the project *La creación de un Museo Pedagógico Andaluz*, awarded in 2004 to a group of teachers and researchers from different Andalusian universities, managed and directed from the University of Sevilla by M. Nieves Gómez<sup>26</sup>. We find another example in the Museo Virtual de la Educación «Manuel B. Cossío»<sup>27</sup>, connected to the Museo de Historia de la Educación «Manuel B. Cossío», from the Universidad Complutense de Madrid, created as a result of the I+D+I project *Creación de un museo virtual de etnografía escolar de la España contemporánea*, awarded in 2005 to a group of researchers from the UCM, directed by Julio Ruiz Berrio, conceived with the aim of adding school objects in the process of learning history of education by the students of the Faculty of Education in that university, although it ended up being a museum of museums, due to the fact that aside from owning the digitalised museum catalogues, they also own collections made up from the cession of digital representations of patrimonial goods whose property belong to different museums and patrimonial institutions<sup>28</sup>. It is also worth pointing out the Museo Virtual de Historia de la Educación (MUVHE)<sup>29</sup>, the result of the I+D+I program *El patrimonio cultural de las instituciones educativas en la España contemporánea (siglos XIX-XX)*, awarded in 2007 to a group of researchers from the Universidad de Murcia, under Antonio

*l'actualitat*, «Educació i Història. Revista d'història de l'educació», n. 17, 2011, pp. 261-270.

<sup>25</sup> EXC/2005/HUM-562 *Museo didáctico virtual del Patrimonio Histórico-Educativo Andaluz* (Dir. M.N. Gómez, Universidad de Sevilla). Museo Pedagógico Andaluz: <<http://www.museopedagogicoandaluz.com/>> (last accessed: July 14<sup>th</sup>, 2014).

<sup>26</sup> V. Guichot, M. Núñez, M.J. Rebollo, G. Trigueros, *El Museo Pedagógico Andaluz. Problemas y perspectivas de futuro*, in A. Escolano (ed.), *La cultura material de la escuela. En el centenario de la Junta para la Ampliación de Estudios, 1907-2007*, Berlanga de Duero, CEINCE, 2007, pp. 243-257; P. Álvarez, *El Museo Didáctico Virtual del Patrimonio Histórico-Educativo Andaluz como recurso para la enseñanza de la Historia de la Educación*, in M.R. Berruezo, S. Conejero, *El largo camino hacia una educación inclusiva: la educación especial y social del siglo XIX a nuestros días (II)*, Pamplona, Universidad Pública de Navarra, SEDHE, 2009, pp. 563-572; P. Álvarez, *El Museo Didáctico Virtual del Patrimonio Histórico-Educativo Andaluz como catedral de la memoria histórico-educativa de Andalucía*, «Foro de Educación. Pensamiento, educación y cultura», vol. 7, n. 11, 2009, pp. 275-286.

<sup>27</sup> SEJ2005-07116 *Creación de un museo virtual de etnografía escolar de la España contemporánea* (Dir. J. Ruiz Berrio, Universidad Complutense de Madrid). Museo Virtual de la Educación «Bartolomé Cossío»: <<http://mcossio.hst.ucm.es/museoeducacion/index.html>> (last accessed: July 14<sup>th</sup>, 2014).

<sup>28</sup> J. Ruiz Berrio, *Hacia un museo virtual de educación diferente: El «Manuel Bartolomé Cossío»*, en E. Colleldemont, N. Padrós, I. Carrillo (coord.), *Memoria, ciudadanía y museos de educación*, Vic, Universitat de Vic, SEPHE, 2010, pp. 204-210.

<sup>29</sup> SEJ2007-66165/EDUC *El patrimonio cultural de las instituciones educativas en la España contemporánea (siglos XIX-XX)* (Dir. A. Viñao, Universidad de Murcia). Museo Virtual de Historia de la Educación (MUVHE): <<http://www.um.es/muvhe/user/index.php>> (last accessed: July 14<sup>th</sup>, 2014).

Viñao's guidance, or the Museu Universitari Virtual de Pedagogia (MUVIP)<sup>30</sup>, conceived under Eulàlia Collelldemont's direction, from a collective project by the Facultat de Educació de la Universitat de Vic, and connected to the Grup de Recerca Educativa. It is also worth mentioning, among this group of projects and initiatives carried out by virtue of I+D+I projects, the virtual platform «Patrimoni historicoeducatiu valencià»<sup>31</sup>, created from the *Recuperación, estudio y difusión mediante las TIC del patrimonio histórico-educativo valenciano* project and developed by a group of teachers from the University de València, directed by M. Carmen Agulló<sup>32</sup>. They are all virtual experiences that use the possibilities offered by the network and break the space and time limitations, diversifying the possibilities of access and increasing the diffusion among an increasing number of interested people due to the possibilities the network has to offer.

The above-mentioned experiences were mainly focused on the research aspects and the recovery of the educational heritage. Other studies, recently developed by Pablo Alvarez and Andrés Payà, have focused on other elements such as the teaching process, community participation or its use for the teaching and learning process<sup>33</sup>. In this sense, it is worth pointing out the innovative teaching and research projects, carried out by teachers from this university

<sup>30</sup> Please refer to: <<http://www.uvic.cat/muvip>> (last accessed: July 14<sup>th</sup>, 2014). Cfr. Collelldemont, *Los museos virtuales de educación en España*, cit.

<sup>31</sup> GVAPRE/2008/395 *Recuperación, estudio y difusión mediante las TIC del patrimonio histórico-educativo valenciano* (Dir. M.C. Agulló, Universitat de València). Patrimoni historicoeducatiu valencià: <<http://www.patrimonieducatiuvalencia.com>> (last accessed: July 14<sup>th</sup>, 2014).

<sup>32</sup> M.C. Agulló, A. Payà, *La recuperación del patrimonio histórico-educativo valenciano*, in R. Berruezo, S. Conejero (coord.), *El largo camino hacia una educación inclusiva. Aportaciones desde la historia de la educación (II)*, Pamplona, Universidad Pública de Navarra, SEDHE, 2009, pp. 579-590; M.C. Agulló, J. Bascuñán, A. Payà, *Una propuesta sobre el patrimonio histórico-educativo valenciano: Diversificar las fuentes, difundir la historia y renovar el discurso pedagógico*, «Cabás: Revista del Centro de Recursos, Interpretación y Estudios en materia educativa (CRIEME)», n. 1, 2009, [online serials] <<http://revista.muesca.es/index.php/articulos/83-una-propuesta-sobre-el-patrimonio-historicoeducativo-valenciano-diversificar-las-fuentes-difundir-la-historia-y-renovar-el-discurso-pedagogico>> (last accessed: July 14<sup>th</sup>, 2014); A. Payà, *El patrimonio valenciano en la red. Un espacio virtual de aprendizaje para la historia de la educación*, in Collelldemont, Padrós, Carrillo (coord.), *Memoria, ciudadanía y museos de educación*, cit., pp. 131-141; A. Payà, *El patrimonio historicoeducatiu i la plataforma digital patrimonieducatiuvalencia.com. Un projecte de tots*, in A. Mayordomo, M.C. Agulló, G. García (coord.), *El patrimonio historicoeducatiu valencià*, Valencia, CEIC Alfons el Vell, Universitat de València, 2011, pp. 267-274.

<sup>33</sup> P. Álvarez (dir.), *Pedagogía Museística: didáctica, virtualidad y difusión del patrimonio histórico-educativo*, Sevilla, Universidad de Sevilla, A3D Edición Digital, 2009; Id., *Possibilitats didàctiques dels Museus Pedagògics Virtuals*, «Butlletí MUVIP», vol. 1, n. 1, 2009, pp. 18-22; Id., *Museos Virtuales de Pedagogía, Enseñanza y Educación: hacia una didáctica del patrimonio histórico-educativo*, «EARI. Educación Artística. Revista de Investigación», n. 2, 2011, pp. 23-27; Payà, *El patrimoni historicoeducatiu i la plataforma digital patrimonieducatiuvalencia.com. Un projecte de tots*, cit.

under Andrés Payà's direction, such as the creation of a «Personal Learning Network (PNL): Escola i història 2.0»<sup>34</sup>, and then a virtual learning space for the study of the educational heritage «Patrimonioeducativo.es»<sup>35</sup>, created with the aim of facilitating an ad hoc virtual learning space to teach educational history 2.0, a term coined by its promoters<sup>36</sup>.

### 3. *HistoEdu.net: a scientific collaborative space or historic educational social network under construction*

As we have already seen, the inevitable and rapid irruption of the technology of information and communication we have witnessed these recent years has conditioned our way of learning, teaching, communicating, informing, researching, etc., in our universities, as they have been introduced to a greater or lesser extent in our daily uses. In this sense, the scientific community of educational historians has not remained unaware of the changes and possibilities that ICT and Web 2.0 could offer for educational historians in the research

<sup>34</sup> UV-SFPIE-DOCE12-80520 *Personal Learning Network (PNL): Escola i història 2.0* (Dir. A. Payà, Universitat de València), <<http://histoesc.uv.es/>> (last accessed: July 14<sup>th</sup>, 2014). This project of applied educational innovation aims to contribute to the process of teaching of the subject History of the School of the University of Valencia from a double perspective: teaching and research. From a teaching perspective, open and reusable teaching material is elaborated that can be used in teaching, with the aim of qualitatively contribute to the students' teaching and learning process. In addition, the research approach of this project aims to evaluate the quality and utility of these learning objects in an applied teaching context, with the aim of contributing to the permanent improvement of the historic educational material available in open format.

<sup>35</sup> UV-INV-AE11-40751 *Diseño y elaboración de un espacio virtual de aprendizaje para el estudio del patrimonio educativo*, 2011-2012 (Dir. A. Payà, Universitat de València), <<http://www.patrimonioeducativo.es/>> (last accessed: July 14<sup>th</sup>, 2014).

<sup>36</sup> On the experience please refer to: P. Álvarez, A. Payà, *Patrimonio educativo.es: un espacio virtual de aprendizaje para el estudio del patrimonio educativo español*, in P.L. Moreno, A. Sebastián (edd.), *Patrimonio y etnografía de la escuela en España y Portugal durante el siglo XX*, Murcia, Universidad de Murcia, CEME, SEPHE, 2012, pp. 583-596; A. Payà, *Historia de la educación 2.0: las TIC al servicio de la docencia y el aprendizaje en la Educación Superior*, in J.M. Hernández Díaz (coord.), *Formación de élites y educación superior en Iberoamérica (s. XVI-XXI)*, Salamanca, Hergar Ediciones, Antema, 2012, pp. 695-702; Id., *Obrint finestres. Les possibilitats de la xarxa per a la didàctica del patrimoni educatiu*, in *Cohesió social i educació*, Girona, Universitat de Girona, 2012, pp. 517-530; A. Payà, P. Álvarez, *Pensar la educación desde las TIC y la recuperación del patrimonio educativo*, in O. Fontal (coord.), *Mirando a Europa: estado de la cuestión y perspectivas de futuro*, Madrid, Ministerio de Educación, Cultura y Deporte, 2012, pp. 546-554; Id., *Historia y patrimonio de la educación 2.0: conocimiento compartido, recursos y propuestas didácticas*, in G. Espigado et al. (coord.), *La Constitución de Cádiz. Genealogía y desarrollo del sistema educativo liberal*, Cádiz, Universidad de Cádiz, SEDHE, 2013, pp. 799-810; Id., *Patrimonio educativo 2.0: hacia una didáctica histórico-educativa más participativa y la investigación en red*, «Cuestiones pedagógicas», vol. 22, 2013, pp. 117-140.

and teaching fields, as it has been mentioned, being the above mentioned programs clear examples of this affirmation. It is also worth pointing out that the academic use of social networks for research and teaching has been a significant improvement to favour the generation, construction and transfer of the scientific knowledge in the university sphere. Teaching and research in the 21<sup>st</sup> century must consider, in a constant and continuous manner, different global coordinates and objectives regarding the uses of social networks, defined by Julio González, Wolfram Lase and Eduardo Adrián as those structures made up from groups of people connected by one or some types of relationships and interwoven by technological platforms that constitute a channel for exchange facilitating different interactions<sup>37</sup>. As we mentioned earlier, the contemporary university and the actors involved must stop and reflect on the benefits of using a social network in order to generate knowledge collaboratively and share it on different levels and scales, to facilitate the visibility of what has already been built, to transmit it to a digitally literate audience and promote the participation and cooperative work among colleagues, dialogue and discussion on an international level, etc.

Nowadays, social networks have burst in the university sphere as a dynamic and interactive display window for teachers and students that allows for participation, from the perspective of an online exchange and dialogue, in the creation and the revaluation of scientific knowledge. Inter-professional participation in a social network undoubtedly facilitates the access to information, rendering it even more visible. The promising use of social networks in universities can contribute to facilitate the communication and collaborative learning as well as introduce new ways to work among the different actors of the training processes as mentioned by Claudia Islas and María del Rocío Carranza<sup>38</sup>. In short, communicative social networks have become a tool that allows for collaborative learning and involves inter-professional information exchange spaces promoting cooperation, dialogue, interrogation, reflection, etc.

We believe that training, university teaching and the teaching process of the history of education from inter-disciplinary approaches cannot be kept oblivious to the process of digital literacy that surrounds us and where social networks are combined with the Web 2.0 philosophy, being the latter something more than a series of technologies and attractive digital services. It is a Web with social interaction and major participation, in which those people with a more active and leading role can contribute at the same time they consume information and use other different services. What has been called Web 2.0 is, simultaneously, a manifestation, cause and consequence of the way in which

<sup>37</sup> Gonzalo, Laser, Adrián, *El uso de redes sociales por parte de las universidades a nivel institucional. Un estudio comparativo*, cit.

<sup>38</sup> Islas, Carranza, *Uso de las redes sociales como estrategias de aprendizaje ¿Transformación educativa?*, cit.

we can tackle nowadays the distribution of information and the construction of shared knowledge<sup>39</sup>. The recent introduction of Web 2.0 and its possibilities in scientific research has brought about a new and important transformation in online training systems. Due to this fact, not only can we read information as researchers, but also have the opportunity to communicate and share the knowledge accordingly to the digital approach of the information society. It is all about participating, as historians in the reconstruction of science from the activity in a digital environment, learning to build a network of knowledge and work through it with our colleagues in the academic and scientific field in a collaborative, dynamic and active manner, as we participate in the process of shaping a digital identity connected to the teaching and learning historic educational processes. In this sense, online working is shaped as an emergent challenge for educational historians, gathered in a new pedagogical paradigm that is intimately related to more participative ways of creating and transferring knowledge in our scientific community. We have to take advantage of the free circulation of users among the Web community and social networks in order to generate new processes of inter-disciplinary collaboration and facilitate the construction of historic educational knowledge among multiple identities. We are brought together to generate network knowledge, since it will allow us to collaborate internationally in the construction of new speeches and historic educational approaches. Web 2.0 and social networks provide the educational historians with opportunities to work online and collaborate with those sharing our same interests. That is why, given the need of exchange processes of information, knowledge and experiences among educational historians, as well as the need to promote a collaborative and constructivist learning process for this academic subject, a new space of scientific collaboration or social network for history as an academic discipline and a research field has been created in Spain: HistoEdu.net<sup>40</sup>.

With this collaborative scientific space or historic educational social network, a new space of public dimension is configured in order to share, offer, create and recreate opportunities for research in the field of the history of education. In this space, historians are invited to share their knowledge as they are challenged to build it, spread relevant information, offer different resources, collaborate among academics and professionals, work online and establish and diversify their contacts, etc. That is why and in order to provide an answer to the needs detected by teachers and educational history researchers needs in Spain, the creation of a space of scientific collaboration or historic educational social network has been divided in three different stages: 1) analysis of the

<sup>39</sup> Álvarez, Payà, *Patrimonio educativo 2.0: hacia una didáctica histórico-educativa más participativa y la investigación en red*, cit.

<sup>40</sup> GV2013-089 *Patrimonio educativo 2.0: personal learning network and education heritage* (Dir. A. Payà, Universidad de València), <<http://www.histoedu.net>> (last accessed: July 14<sup>th</sup>, 2014).

status of the question and study of modular open source platforms that allow for the deployment of a social network; 2) detection of the needs perceived by the scientific community of educational historians and precision of the main and most needed characteristics for an educational historians social network; 3) module selection or platform characteristics and design of an alpha beta; 4) test and piloting, usability analysis, accessibility, suitability, etc. of the platform and the necessary revisions; 5) Open beta launch<sup>41</sup>.

This project is currently in its fourth stage, as mentioned above, and the research team has aimed for creating a specific social network at the service of teachers and students, researchers and institutions related to educational history and its related disciplines, from an open source platform and once the main commercial social networks were analysed and discarded, since they did not adjust to the needs received by the community of educational historians in Spain, detected through a survey distributed to the different university associations related to history of education and the educational heritage: Sociedad Española de Historia de la Educación (SEDHE), Societat d'Història de l'Educació dels Països de Llengua Catalana (SHEPPLLC, IEC), Sociedad Española para el Estudio del Patrimonio Educativo (SEPHE) and Red Iberoamericana para la Investigación y Difusión del Patrimonio Educativo (RIDPHE)<sup>42</sup>.

### *Conclusions*

As a final recap and conclusion, it is worth pointing out that since the beginning of the 21<sup>st</sup> century, the possibilities that the Internet, the Web and social networks have offered to educational historians have not been unrelated to their interests. In his sense, this article outlines some projects and precedents carried out in Spain regarding the possibilities the Web offered, as it focus on one hand, in the creation of strictly virtual museum initiatives on the educational heritage, which dealt with the research aspects and the recovery of educational heritage; and on the other hand in projects recently developed that have had an impact on elements such as the teacher's role, community participation or its use for teaching and learning processes up to the point of designing and elaborating a learning virtual space for the study of the educational heritage *ex professo* created with the aim of facilitating an ad-hoc virtual learning space to teach history of education 2.0.

<sup>41</sup> A. Payà, P. Álvarez, *Ús professional i possibilitats docents de les xarxes socials a la història de l'educació*. «HistoEdu»: un espai de col·laboració científica, in F. Comas, S. González, X. Motilla, S. Sureda (edd.), *Imatges de l'escola, imatge de l'educació*, Palma, Universitat de les Illes Balears, 2014.

<sup>42</sup> Online survey elaborated with Google Drive and available on the URL: <<http://goo.gl/8C4KMv>> (last accessed: July 14<sup>th</sup>, 2014).

A step further in the construction of a history of education 2.0 in Spain that brings together teachers, students, researchers and institutions related to the history of education as an academic discipline and a research field is the creation of a collaborative scientific space or historic educational social network where, on the one hand, debates and the exchange of ideas, material and research are promoted in the teaching and learning processes and, on the other, the research on educational history in our country, moving towards a globalised space. In this sense, HistoEdu.net aims to be, in the near future, a true forum and a meeting point where educational historians from our country and other different countries can share, cooperate and work together for a better and more appreciated history of education, being an initiative from all and for all educational historians.





# Il nostro tempo «non ammette una ordinaria amministrazione». L'arcivescovo Montini e i fermenti della Chiesa milanese\*

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*Our age «does not admit an ordinary administration». The Archbishop Montini and the ferments of the Milanese Church*

**ABSTRACT:** The essay analyzes the pastoral action of Giovanni Battista Montini, archbishop of Milan, during the transformation of the city and the diocese that challenged the cornerstones of the pastoral tradition of Milan: parishes, oratories and associations of Catholic Action. From the analysis of the records conserved from the secretariat of the archbishop is possible to discover the way that Montini dealt with new ecclesial experiences and groups that involved a growing number of laymen and priests. These groups had required an accurate evaluation from who had the administration of the diocese because their characteristics put them out of the ordinary pastoral action. The purpose of the paper is to show the approach of the Archbishop to the whole overview of the extra-parish experiences of aggregation that flourished in the Ambrosian diocese, not connected with the Catholic Action. Among these there were spiritual families, associations of lay and clergymen, first attempts of «new communities» and ecclesiastical movements in fieri, as the Focolare movement and Gioventù Studentesca of father Luigi Giussani, which first developments correspond with the years of the Montini's episcopate.

**EET/TEE KEYWORDS:** Christian Education; Catholicism; History of Church; Italy; XX<sup>th</sup> Century.

\* Questo saggio costituisce un organico e significativo sviluppo della relazione presentata da chi scrive al convegno dedicato a «Giovanni Battista Montini arcivescovo di Milano», svoltosi tra il 15 e il 17 gennaio 2015 a Villa Cagnola (Gazzada) e a Milano. La relazione comparirà negli atti del convegno. Ringrazio Federica Maveri, il cui aiuto è stato indispensabile per la ricerca della documentazione su cui si basa questo contributo. Un ringraziamento va anche a Marta Busani, per i suoi utili suggerimenti.

### 1. *L'episcopato di Montini tra continuità e rinnovamento*

Le coordinate dell'episcopato di Giovanni Battista Montini sono state evidenziate dagli studi che lo hanno inquadrato all'interno della Chiesa del suo tempo e che, pur presentando ipotesi interpretative che aprono a sviluppi anche diversi, ne hanno individuato alcune caratteristiche salienti, grazie a lavori capaci di mettere in sinergia il volto pubblico di Montini, così come emerge nelle riflessioni ad alta voce che spesso sono i suoi discorsi, e la trama composita di azioni, rapporti e sollecitazioni di cui i carteggi conservati dalla sua Segreteria sono preziosa testimonianza<sup>1</sup>. La validità di tale approccio storiografico è confermata dall'analisi dei documenti recentemente messi a disposizione degli studiosi che, insieme alle carte da tempo accessibili, sono fonte preziosa per chi voglia conoscere Montini arcivescovo di Milano. Questo saggio vuole conoscere Montini arcivescovo a partire da un'angolazione significativa e sinora inesplorata, cui qualcuno ha fatto rapidi cenni senza che però gli elementi emersi siano stati connessi al più ampio, composito, quadro che Montini si trovò ad affrontare. Sappiamo quali sono stati i perni dell'azione pastorale dell'arcivescovo e sappiamo che tale azione si svolge in un momento di evoluzione del quadro diocesano, anche se, ai tempi di Montini, i capisaldi pastorali della tradizione ambrosiana sembravano avere una certa capacità di tenuta. Inoltre siamo stati avvertiti circa le relazioni dell'arcivescovo con qualche esperimento pastorale la cui natura non si era ancora chiarificata. È il caso, ad esempio, di quella parte della GIAC ambrosiana che ha dato vita a Gioventù Studentesca, la quale, proprio allora, stava iniziando a porsi come un soggetto nuovo nel campo della pastorale giovanile. Chi scrive ha avuto modo di incrociare la questione non tanto, però, dal punto di vista dell'arcivescovo, bensì delle relazioni che ci sono state fra tale esperimento di aggregazione giovanile e la recezione del Concilio Vaticano II<sup>2</sup>. Quel che, sino ad ora, non era abbastanza scandagliato è il contesto di riferimento complessivo in cui tale esperimento si situa, e non per la matrice di Azione Cattolica entro il quale, alle sue origini, si è sviluppato, ma nell'insieme delle esperienze di aggregazione extra-parrocchiale, non sempre collegabili all'AC, che, negli anni di Montini arcivescovo, popolavano il vissuto ambrosiano.

Per contribuire a comprendere il modo di essere vescovo di Montini si vuole dunque coglierlo alle prese con ciò che non era inquadrabile, o del tutto inquadrabile, nella pastorale ordinaria e che la diocesi ambrosiana, durante il suo episcopato, offriva in quantità non trascurabile. Lo testimoniano

<sup>1</sup> Mi riferisco soprattutto ai lavori di chi, come Giselda Adornato, ci ha restituito un'immagine di Montini arcivescovo convincente, anche perché fondata sulla conoscenza approfondita e globale della documentazione prodotta dal suo episcopato.

<sup>2</sup> M. Bocci, «*La Chiesa in quanto tale*». *Il Concilio indiviso, da Gioventù Studentesca a Comunione e Liberazione*, «Bollettino dell'Archivio per la storia del movimento sociale cattolico in Italia», vol. 44, nn. 2-3, 2010, pp. 187-281.

gli stessi collaboratori di Montini: «Fermenti nuovi si rilevavano ad ogni livello ed in ogni settore – ha scritto il vescovo ausiliare Luigi Oldani –. Una ordinaria amministrazione sarebbe stata pericolosa»<sup>3</sup>. Oldani riecheggava una riflessione sviluppata dall'arcivescovo già nel novembre del 1955, a pochi mesi dall'entrata in diocesi, durante un discorso ai dirigenti diocesani della GIAC. In quella occasione Montini si era detto convinto che il tempo cui la Chiesa milanese doveva far fronte, non pacifico né tranquillo, non ammetteva «una ordinaria amministrazione»<sup>4</sup>. Ma di quali «fermenti» si trattava? Oldani si riferiva alle trasformazioni di una metropoli che era «la più ricca, industrializzata, problematica fra le cento città d'Italia»<sup>5</sup>, nella quale lo sviluppo economico stava modificando un costume di vita plurisecolare, una città – come scriveva l'arcivescovo a padre Riccardo Lombardi – «i cui bisogni morali e religiosi [erano] immensi ed [erano] motivo di una grande ansietà»<sup>6</sup>. A tale livello, ovviamente, i fermenti erano tanti. Basti pensare alla Milano del lavoro, oppure alla città che stava sperimentando spostamenti politici giudicati preoccupanti da Montini<sup>7</sup>; o, ancora, alle ansie culturali e alle inquietudini ideologiche di qualche intellettuale e di una certa quota di fedeli, nonché a quelle che Giorgio Rumi ha definito irrequietezze disciplinari e laicali<sup>8</sup>. In questa sede, ci si concentra su esperienze pastorali e gruppi ecclesiali che, per le loro caratteristiche, non erano in tutto e per tutto assimilabili ai ritmi consueti della tradizione ambrosiana e che, nella Milano cattolica a cavallo tra anni Cinquanta e Sessanta, coinvolgevano un numero crescente di laici e sacerdoti. Si trattava anzi – per dirla con Carlo Figini, interpellato da Montini proprio su questo tema – di un momento di passaggio in cui si notava «una lussureggiante fioritura di ordini secolari, di pie unioni, di movimenti d'anime [...], di famiglie spirituali»<sup>9</sup> che si ponevano accanto alla pastorale ordinaria senza però connettersi organicamente né alla parrocchia né all'associazionismo cattolico e che, proprio per questo, chiedevano a Montini prese di posizione e

<sup>3</sup> L. Oldani, *L'episcopato milanese di papa Montini*, «Diocesi di Milano», n. 5, 1970, p. 241.

<sup>4</sup> Discorso di Montini ai partecipanti alla XXX Assemblea dei dirigenti diocesani delle associazioni della GIAC nella sede dell'Azione Cattolica di Milano, 13 novembre 1955, in G.B. Montini-Paolo VI, *La pedagogia della coscienza cristiana. Discorsi e scritti sull'educazione (1955-1978)*, A. Maffei (ed.), Roma-Brescia, Studium-Istituto Paolo VI, 2009, p. 20.

<sup>5</sup> G. Rumi, *L'arcivescovo Montini e la società del suo tempo*, in Id., *Lombardia guelfa. 1780-1980*, Brescia, Morcelliana, 1988, p. 213. L'età montiniana, in effetti, vede il livello massimo di industrializzazione e del fenomeno immigratorio. Si veda anche G.E. Manzoni, *Montini a Milano: le sfide della modernità*, «Humanitas», vol. 52, nn. 5-6, 1997, p. 777.

<sup>6</sup> Archivio storico diocesano di Milano (d'ora innanzi ADM), *Archivio della Segreteria dell'arcivescovo Montini* (d'ora innanzi ASAM), 125, 526, lettera del 7 aprile 1962.

<sup>7</sup> Cfr. E. Versace, *Montini e l'apertura a sinistra. Il falso mito del «vescovo progressista»*, Milano, Guerini, 2007.

<sup>8</sup> G. Rumi, *La Missione di Milano: oltre i confini della tradizione*, in L. Vaccaro (ed.), *Il cristiano laico. L'eredità dell'arcivescovo Montini*, Brescia, Morcelliana, 2004, p. 172.

<sup>9</sup> ADM, ASAM, 239, 814, lettera di Figini a Montini del 20 marzo 1961.

pronunciamenti, e dunque presupponevano l'attenta valutazione di chi aveva la responsabilità del governo diocesano.

Che non bastasse un'amministrazione della diocesi confinata nella gestione ordinaria e nella salvaguardia di consuetudini che avevano fatto il loro tempo era consapevolezza di Montini; allo stesso tempo, l'arcivescovo credeva che metodi pastorali incentrati sulla mobilitazione di massa, così diffusi nei decenni precedenti, non fossero più adeguati a un contesto sociale che era stato colpito dal processo di secolarizzazione, un processo che Montini coglieva in anticipo rispetto a molti vescovi italiani<sup>10</sup>. «Il momento spirituale odierno non è più quello di ieri, e sembra meno disposto ad accendersi in entusiasmi collettivi e positivi», si legge in un'altra lettera indirizzata a padre Lombardi<sup>11</sup>. Il famoso gesuita, che aveva inondato il mondo cattolico con le sue infiammate predicazioni, mirava ora a diffondere il cosiddetto «Movimento Mondo Migliore» nella diocesi più grande d'Italia. Come è noto, tale Movimento era nato con l'avvallo di Pio XII e con il fine di suscitare una rinnovata mobilitazione cattolica, alimentando la vita religiosa delle diocesi italiane e rendendo più agile e funzionante la stessa Curia romana<sup>12</sup>. Sin dall'arrivo di Montini e poi agli inizi degli anni Sessanta, in una temperie ecclesiale segnata dal pontificato giovanneo che aveva ritirato il mandato affidatogli da Pio XII, il gesuita avanzava all'arcivescovo una serie di proposte che avrebbero dovuto coinvolgere la diocesi a vari livelli, offrendosi fra l'altro di «fare una predicazione di grande risonanza a Milano»<sup>13</sup>, che avrebbe raggiunto, a tappe preordinate, vescovi e fedeli delle maggiori città lombarde. Montini tuttavia, confermato da un parere confidenziale della Segreteria di Stato, faceva da argine ai suoi progetti, osservando che «la rispondenza del pubblico a manifestazioni religiose di questo genere non è, molto probabilmente, oggi quella che è stata ieri» e che «le condizioni locali sono ora così varie e delicate, che esigono che l'azione pastorale sia piena di accorgimenti e spesso di lentezze»<sup>14</sup>.

<sup>10</sup> G. Adornato, *Paolo VI. La storia, l'eredità, la santità*, Cinisello Balsamo, San Paolo, 2014, pp. 55-56.

<sup>11</sup> ADM, ASAM, 125, 526, lettera del 21 aprile 1961. Montini reagiva a una richiesta esplicitata da Lombardi con lettera del 1° aprile 1961, nella quale il gesuita aveva scritto che gli sembrava «tornato il momento di ridarmi a una predicazione di massa nelle Cattedrali, dove i Vescovi volessero invitare, per promuovere un senso di responsabilità e unione nel campo cattolico, in un'ora così grave».

<sup>12</sup> A. Riccardi, *Vescovi d'Italia. Storie e profili del Novecento*, Cinisello Balsamo, San Paolo, 2000, pp. 29-30 e 114. Sul «Movimento mondo migliore» si veda R. Sani, *Mobilitazione e rinnovamento: la proposta religiosa di padre Lombardi*, in Id., *La Civiltà Cattolica e la politica italiana nel secondo dopoguerra (1945-1958)*, Milano, Vita e Pensiero, 2004, pp. 169-204.

<sup>13</sup> ADM, ASAM, 125, 526, lettera di Montini a mons. Egidio Bignamini, arcivescovo di Ancona, datata 3 aprile 1962. Dalla corrispondenza si desume che, tra le preoccupazioni di Montini, vi era una possibile strumentalizzazione politica della predicazione del gesuita.

<sup>14</sup> ADM, ASAM, 125, 526, «confidenziale» indirizzata al sostituto Angelo Dell'Acqua, datata 24 luglio 1961, con la quale Montini chiedeva se Lombardi aveva un mandato della Santa Sede. La risposta del sostituto, del 21 agosto successivo, faceva sapere che la Congregazione concistoriale

Accorgimenti, delicatezze, cautele sono appunto tratti peculiari dell'azione di Montini arcivescovo, anche nel caso di una «negativa» come quella riservata a padre Lombardi<sup>15</sup>. All'inizio dell'episcopato si coglie anzi, nella corrispondenza di Montini, qualche riflesso di uno stato d'animo che doveva influire sul suo approccio «a tutto un complesso di tradizioni» tipicamente ambrosiano, innestato su parrocchie, oratori e associazioni di Azione Cattolica, dal quale era stato lontano per tanto tempo e che ora avvicinava con circospezione, quasi avesse il bisogno di prendere le misure dell'incarico che gli era stato affidato, appesantito, forse, dalle preoccupazioni che gli venivano dalle circostanze in cui era maturata la sua destinazione alla diocesi di Milano. «Per me [...], che sono qui da poco e che sono nuovo ai problemi pastorali», si legge in una missiva, «si impone la necessità di una maggiore e oculata prudenza nell'introdurre forme nuove le quali, benché in sé [*sic*] stesse lodevoli e degne, potrebbero recare qualche disturbo all'unità del lavoro parrocchiale e diocesano»<sup>16</sup>. La prudenza, dote riconosciuta all'arcivescovo che si declinava nella necessità di avere una conoscenza realistica e obiettiva di ciò che era oggetto di discussione e decisione<sup>17</sup>, gli suggeriva un metodo che si avvaleva di istruttorie dettagliate, che coinvolgevano coloro che, per Montini, erano punti di riferimento qualificati. È il caso di Carlo Figini e di Giovanni Colombo, come è il caso di Sergio Pignedoli<sup>18</sup>, nominato vescovo ausiliare nel '55 con una delega ampia, che comprendeva, tra le altre funzioni, il compito di «vigilare, promuovere, coordinare secondo le norme vigenti i varî movimenti dell'apostolato dei Laici e delle opere istituite per la loro assistenza spirituale, e specialmente quelli in

si era pronunciata in questi termini: «Nessun mandato speciale della Santa Sede. Ogni Vescovo si regoli come crede: si eviti il chiasso. Già si è disposto perché il Rev. P. Lombardi eviti sempre atteggiamenti meno temperati». Un appunto a mano sulla risposta di Dell'Acqua, datato 5 ottobre 1961, fa sapere che Montini notificò tale risposta alla Conferenza Episcopale Lombarda. Riccardi ricorda che Montini, in CEI, aveva espresso riserve nel caso in cui Lombardi «volesse soprattutto criticare» e «se dovesse creare altre organizzazioni in conflitto» (Riccardi, *Vescovi d'Italia*, cit., p. 30).

<sup>15</sup> Non per niente il gesuita, dopo aver avuto conferma della risposta negativa di Montini, gli scriveva: «Per parte mia conservo un ricordo profondo della delicatezza e del "rispetto" con cui ho visto che Lei cercava la via del Signore» (ADM, ASAM, 125, 526, 21 aprile 1962). Come scrive Podestà, Montini si muoveva con «cauta, graduale e ben delimitata intenzione ordinatrice»: G.L. Podestà, *L'episcopato di G.B. Montini a Milano (1955-1963)*, in G. Alberigo (ed.), *Chiese italiane e Concilio. Esperienze pastorali nella chiesa italiana tra Pio XII e Paolo VI*, Genova, Marietti, 1988, p. 95.

<sup>16</sup> ADM, ASAM, 125, 526, dattiloscritto non datato ma inserito nella corrispondenza del '55, pensato come risposta a una lettera di Lombardi ma probabilmente non spedito.

<sup>17</sup> Montini «non fa qualcosa se prima non raccoglie dati e analizza intellettualmente i presupposti e le possibili conseguenze di quell'azione» (G. Adornato, *Nuove piste di ricerca sull'episcopato di G.B. Montini a Milano*, «Notiziario» dell'Istituto Paolo VI, n. 46, 2003, p. 94).

<sup>18</sup> Tra la documentazione concernente Mondo Migliore si conserva ad esempio un appunto dattiloscritto firmato da Pignedoli e datato 22 giugno 1960, che avanzava perplessità sulle proposte di padre Lombardi, intravedendo nelle sue iniziative «una Istituzione "personale"» che scavalcava le competenze delle Congregazioni vaticane. Sull'appunto Montini aggiunse di suo pugno: «31. VIII. 1960 Mons. G. Colombo condivide» (ADM, ASAM, 125, 526).

favore della gioventù, come la gioventù Cattolica, gli Oratorî, gli Esploratori Cattolici, gli studenti universitari e medi e ogni altra associazione giovanile»<sup>19</sup>. L'apertura a un'inedita prospettiva pastorale significava, dunque, non volontà di scavalcare il portato della tradizione né, tanto meno, di arrestare un delicato e complesso meccanismo diocesano, da rimettere semmai in movimento a partire da uno «sforzo coordinatore» che nell'arcivescovo doveva trovare garanzia di unità e di fedeltà alla dottrina<sup>20</sup>. In effetti, di fronte a qualsiasi proposta che usciva dagli schemi della pastorale ordinaria Montini ribadiva la centralità dei «programmi stabiliti dalla Autorità della Chiesa», con l'obiettivo di salvaguardare ruoli e competenze<sup>21</sup>.

Ciò che suonava nuovo, specialmente alla sensibilità di chi era abituato a porre l'accento sulla dimensione organizzativa, era altro, e cioè la capacità di intuire i sintomi delle trasformazioni in corso e di far affidamento, per affrontarli, sulle potenzialità inscritte nell'annuncio evangelico, che per Montini era sempre da riscoprire nel paragone con la temperie storica, evitando le tentazioni dell'evasione e dell'arroccamento, che potevano essere dettate non solo dalla paura del cambiamento, ma anche da un cristianesimo stanco e infiacchito. «Io penso che la religione, oggi, decada più per il senso di abitudine, di stanchezza e di consuetudine con cui si presenta, che per l'assalto dei suoi nemici», affermava l'arcivescovo davanti a ottocento sacerdoti convenuti in duomo per la Missione al clero.

Ai tempi moderni, così mutati, così inquieti, così avidi [...] di tutto conoscere, di tutto esplorare – anche la religione – e dall'altro così lontani e così distratti, che delle cose abitudinarie e consuetudinarie non si curano, noi offriamo spesso una presentazione del cristianesimo che manca del senso del vivo, del mistero, del personale e del vissuto, facendoci inconsapevolmente complici del decadimento religioso della nostra generazione<sup>22</sup>.

Il cristianesimo invece, diceva Montini ai giovani della GIAC, «è vivacità, vocazione ad una grandezza, chiamata ad aumentare la nostra personalità, ad

<sup>19</sup> G.B. Montini, *Un aiuto valido e generoso*, in *Discorsi e scritti milanesi (1954-1963)*, 4 voll., Roma-Brescia, Studium-Istituto Paolo VI, 1997, vol. I, p. 341. Sulla nomina di Pignedoli si veda Potestà, *L'episcopato di G.B. Montini a Milano*, cit., pp. 95-96. Pignedoli rimase vescovo ausiliare fino al 1960, quando fu sostituito da Giovanni Colombo, rettore maggiore dei seminari diocesani.

<sup>20</sup> L'espressione si trova in una lettera manoscritta del 31 dicembre 1955, pensata per Lombardi ma probabilmente non spedita. «Qui già è in atto, per quanto è possibile, un programma intensivo d'azione religiosa e morale; la difficoltà maggiore – notava Montini – sta nel mantenere l'impegno ad un lavoro ordinato, e trova argomento nello spirito di riforma e di critica e di originalità, ch'è di moda, e che alimenta un particolarismo capace piuttosto di scoraggiare lo sforzo coordinatore e costruttore d'una nova compagine cristiana, che di arricchire il campo di Dio di benefiche e libere esperienze» (ADM, ASAM, 125, 526).

<sup>21</sup> ADM, ASAM, 125, 526, appunto manoscritto di Montini, allegato a una lettera di don Fausto Balestrini, segretario generale del «Centro Internazionale Pio XII per un mondo migliore», datata 30 maggio 1960.

<sup>22</sup> G.B. Montini, *Rendere operante il nostro vivere religioso*, in *Discorsi e scritti milanesi*, cit., vol. I, p. 1703, discorso del 22 ottobre 1957.

avere pensieri grandi», e tutto ciò significa crescita continua, una crescita senza la quale l'appartenenza religiosa manca di autenticità<sup>23</sup>. Sta qui l'origine della disponibilità di Montini a confrontarsi non solo con il nuovo, ma con quella categoria che è al centro delle sue riflessioni, vale a dire il moderno. Come è stato notato, il «motivo dominante» del suo episcopato lo si coglie in quel passaggio del discorso pronunciato in occasione dell'ingresso in diocesi che gli faceva sottolineare la necessità di un cristianesimo «vero, adeguato al tempo moderno», dove per «vero» si intendeva, appunto, «autentico»<sup>24</sup>. Sono molti i discorsi di Montini in cui ricorre questa preoccupazione. «Come fare a dare ai giovani un'autentica sensibilità religiosa?», chiedeva agli assistenti della GIAC. La difficoltà stava nel far sì che la religione non fosse «soltanto una osservanza», ma avesse «carattere personale». Occorreva allora proporla come «il canale di comunicazione con un mondo invisibile, ma molto vicino, molto esigente e anche molto bello»<sup>25</sup>. A risolvere presunte svolte e improbabili contraddizioni, che una parte della storiografia intravede nel percorso di Montini, interviene questa consapevolezza manifestata in varie occasioni dall'arcivescovo, che tiene insieme due aspetti entrambi presenti nel suo punto di vista, vale a dire il legame ininterrotto con la tradizione e la disponibilità a fare i conti con il nuovo, dove per nuovo, però, si intende non tanto e non principalmente ciò che maturava nel contesto civile e sociale, bensì le urgenze profonde della sensibilità contemporanea, urgenze che implicavano un cristianesimo rinnovato anche se operante, tendenzialmente, entro i limiti pastorali conosciuti. Vale la pena di ricordare che, se si tralascia tale prospettiva, si finisce per non capire Montini e per disegnare una personalità irrisolta, sempre in forse tra vecchio e nuovo.

## 2. *L'arcivescovo e i fermenti della Chiesa milanese*

L'analisi delle relazioni di Montini arcivescovo con i fermenti della Chiesa milanese dimostra la validità della chiave interpretativa cui si è fatto riferimento, confermata peraltro da iniziative come la Missione di Milano e la lettera

<sup>23</sup> Discorso all'assemblea dei dirigenti diocesani della GIAC del 13 novembre 1955, in Montini-Paolo VI, *La pedagogia della coscienza cristiana*, cit., pp. 20-21. Un cristiano che non si propone di crescere – aggiungeva Montini – è un cristiano non autentico. «Il Signore ha messo nella coscienza dei fedeli una inquietudine, una insoddisfazione, un desiderio di maggior carità, di maggior comprensione, di maggior fede. Se noi dicessimo basta, avremmo riposato l'animo, ma sarebbe quasi un tradimento alla vocazione che è continua, esplosive, fino a che saremo arrivati all'ultimo confine del nostro umano pellegrinaggio terreno» (*ibid.*).

<sup>24</sup> B. Seveso, *Cristianesimo e società civile. L'esperienza pastorale di G.B. Montini*, in A. Majo (ed.), *G.B. Montini arcivescovo*, Milano, NED, 1983, pp. 39-40.

<sup>25</sup> G.B. Montini, *Dare ai giovani un'autentica sensibilità religiosa*, intervento alla Tre giorni diocesana degli assistenti della GIAC riuniti alla Casa alpina all'Alpe Motta di Campodolcino (SO), 15 novembre 1955, in *Discorsi e scritti milanesi*, cit., vol. I, pp. 495-504.

quaresimale sul senso religioso. Tra le carte della Segreteria dell'arcivescovo si conservano vari elenchi manoscritti, stilati da Montini, che registrano alcuni di questi fermenti, vale a dire opere e iniziative che esulavano dai canoni della pastorale ordinaria e che, proprio per questo, richiedevano il discernimento di Montini. Si tratta di una dozzina di voci, tra le quali, insieme a Mondo Migliore, si trovano l'Opus Dei, i Focolarini e gli istituti secolari<sup>26</sup>. Vi sono nominate, poi, altre esperienze singolari per la loro impostazione, ma cresciute nell'alveo della Chiesa locale. Quanto all'Opus Dei, nella corrispondenza dell'arcivescovo essa ha spazio limitato, se si eccettuano alcune lettere concernenti il progetto di erigere a Milano un pensionato universitario, da cui emerge il consenso di Montini agli «alti fini apostolici» dell'Opus, sempre condizionato, nondimeno, all'«intesa con le altre Istituzioni ed opere cattoliche» che a Milano si occupavano degli universitari<sup>27</sup>. Certo è che l'Opus Dei aveva già ricevuto l'approvazione definitiva della Santa Sede, fatto che a Montini doveva sembrare garanzia di affidabilità. Le altre voci che compaiono tra le iniziative da vagliare si possono dividere in due gruppi. Nel primo si trovano opere e sodalizi ereditati dal passato e che non si distinguevano per novità di ispirazione – è il caso di Mondo Migliore –, ma per l'impianto extra-parrocchiale e, a volte, extra-diocesano; nel secondo gruppo sono invece da collocare esperimenti inediti, spesso cominciati all'epoca di Schuster, o iniziative ancora da decifrare nelle loro implicazioni, la cui presenza in diocesi per Montini rimaneva da valutare e la cui opportunità doveva essere condizionata al rispetto di criteri ben precisi. Dal passato derivava l'Apostolato della Preghiera, legato alla Compagnia di Gesù e la cui struttura nazionale aveva trovato una base milanese in piazza San Fedele. L'Apostolato, diffuso nelle parrocchie della diocesi, era variamente incoraggiato da Montini, con la partecipazione a qualche celebrazione organizzata per «zelatrici e zelatori del Sacro Cuore»<sup>28</sup>, nonostante l'arcivescovo manifestasse alcune perplessità in occasione, ad esempio, di una missione mariana sostenuta dal sodalizio e sebbene quest'ultimo, tra i suoi aderenti, potesse contare su un numero esiguo di uomini e di giovani. Montini raccomandava al promotore milanese

<sup>26</sup> ADM, ASAM, 140, 972, elenchi manoscritti, senza data.

<sup>27</sup> ADM, ASAM, 144, 1118, lettera del 22 luglio 1961 a Giambattista Torello, consigliere dell'Opus Dei, che aveva contattato l'arcivescovo sottoponendogli il progetto. Montini sottolineava, inoltre, la necessità di un'oculata gestione economica dell'iniziativa e di «un'adeguata assistenza sia morale, che religiosa, alla gioventù studiosa». Per assicurare l'inserimento del progetto nel panorama diocesano informava mons. Giuseppe Schiavini, vicario generale, e mons. Giuseppe Bicchierai, presidente della Charitas ambrosiana. A Bicchierai, il 18 settembre 1962, sempre a proposito del pensionato Montini scriveva: «Io non intendo ostacolare in alcun modo l'iniziativa dell'Opus Dei, anzi sarò lieto se andrà a buon fine».

<sup>28</sup> ADM, ASAM, 132, 699, lettera di padre Mario Mason, promotore dell'Apostolato della Preghiera, del 15 dicembre 1960. Sono note le riserve di Montini per quella che Massimo Marcocchi definisce «efflorescenza devozionale», con riferimento, appunto, al culto del Sacro Cuore così diffuso nella Milano dei decenni precedenti: M. Marcocchi, *G.B. Montini. Scritti fucini (1925-1933): linee di lettura*, in *Educazione, intellettuali e società in G.B. Montini-Paolo VI. Giornate di studio, Milano, 16-17 novembre 1990*, Roma-Brescia, Studium-Istituto Paolo VI, 1992, pp. 32-33.



dell'Apostolato di accordarsi con i parroci e invitava a tenere «nell'alto onore dovuto il programma che la Chiesa stessa, come principale propone, quello della preghiera liturgica»<sup>29</sup>. Si trattava comunque di una realtà la cui origine risaliva all'Ottocento e il cui peso, in diocesi, non era rilevante, tanto che chi ne era responsabile ammetteva che più che vivere, «vivacchiava»<sup>30</sup>.

Montini, in effetti, aveva ereditato dall'episcopato di Schuster non solo esperienze laicali che si collocavano sugli avamposti del confronto fra cattolicesimo, modernità e società industriale<sup>31</sup>, ma anche iniziative che incominciavano a scontare il trascorrere del tempo, cui l'arcivescovo non faceva mancare parole di incoraggiamento inframmezzandole, però, con esortazioni perché mantenessero la barra al centro, vale a dire rispettassero l'impianto parrocchiale e si uniformassero alle «superiori disposizioni [che] in Italia regola[va]no l'apostolato dei Laici»<sup>32</sup>. In ogni caso, una «prudenza veramente saggia» e una «carità veramente paterna» – per usare parole di don Giulio Oggioni<sup>33</sup> – guidavano l'approccio di Montini a questo tipo di esperimenti, che a volte si ponevano al bivio tra vecchio e nuovo essendo frutto del tentativo di salvare il passato con forme rinnovate, senza che però l'esito di tale operazione desse garanzie di tenuta e di attendibilità. È il caso, ad esempio, di un'unione alimentata da un gruppetto di laiche intenzionate a vivere insieme per poter «seguire una vita di perfezione cristiana seguendo i consigli evangelici»<sup>34</sup>, che era subentrata all'Opera Maria Assunta sviluppatasi durante l'episcopato di Schuster, la quale era incappata in una serie di disavventure che potevano far dubitare della solidità delle intenzioni e della docilità alle attese dei superiori<sup>35</sup>. L'indagine, che l'arcivescovo aveva affidato a don Oggioni, suo delegato presso l'Opera, aveva messo in luce una realtà chiusa e contraddittoria, che sembrava essere approdata all'ipotesi laicale per salvare una vocazione religiosa

<sup>29</sup> ADM, ASAM, 132, 699, lettera di Montini a Mason del 15 febbraio 1958.

<sup>30</sup> ADM, ASAM, 132, 699, lettera di Mason a Montini del 28 febbraio 1959.

<sup>31</sup> M. Catella, *Montini e i movimenti sociali cattolici*, in A. Caprioli, L. Vaccaro (edd.), *Lavoro ed economia in G.B. Montini arcivescovo di Milano*, Brescia, Morcelliana, 1989, pp. 54-55. Catella ha parlato di un arcivescovo che avrebbe fatto riferimento a una visione teologica ed ecclesiologica che ha posto le basi del protagonismo laicale, una visione che in realtà, come dimostrano studi successivi, non appartenne in tutto e per tutto a Montini.

<sup>32</sup> Lettera di Montini a mons. Ennio Bernasconi (ADM, ASAM, 132, 715, 29 aprile 1955), concernente la «Legione di Maria». Bernasconi era assistente diocesano della Legione, i cui membri erano diffusi in tutto il mondo e che, a Milano, contava 21 «presidi».

<sup>33</sup> ADM, ASAM, 144, 1103, lettera del 27 novembre 1959.

<sup>34</sup> ADM, ASAM, 144, 1103, lettera dattiloscritta diretta a Montini, datata 23 settembre 1959 e firmata da otto donne.

<sup>35</sup> La valutazione era di Oggioni, della Facoltà Teologica Milanese, incaricato da Montini di indagare sulla questione. Oggioni scriveva che le persone interessate, pur essendo «ottime», non avevano le capacità necessarie a fondare un istituto secolare e, pur professandosi pronte all'ubbidienza, pativano la difficoltà di rinunciare alla loro opera e proprio per questo nutrivano una qualche resistenza alle indicazioni dell'autorità ecclesiastica. Il sacerdote consigliava di sopprimere il gruppo (ADM, ASAM, 144, 1103, lettera del 17 luglio 1959).

immatura. Ad aggravare la situazione c'era la volontà di non rinunciare a compiti educativi che le aderenti alla «pia unione» avevano dimostrato di non saper svolgere, a causa di un'impostazione «moraleggiante» e infarcita di sentimentalismo religioso che già aveva prodotto esiti negativi<sup>36</sup>. Proprio per questo Montini, pur autorizzando il gruppo a continuare la vita comunitaria «ad triennium», stabiliva che non si occupasse di educazione dei giovani. Se evitava di sopprimere un'iniziativa che non dava garanzia di robustezza spirituale per «salvare l'ideale di un apostolato» cui le persone coinvolte avevano dedicato la vita<sup>37</sup>, l'arcivescovo ne limitava però sensibilmente il raggio di azione, stabilendo che la «pia unione» fosse seguita da assistenti spirituali di sua fiducia e che si accontentasse di portare avanti un lavoro silenzioso di affinamento religioso<sup>38</sup>.

Dunque Montini procedeva con circospezione, non ponendo fine a ciò che aveva ereditato dall'episcopato precedente ma, al tempo stesso, andando a fondo delle questioni che rimanevano aperte e non abdicando alla responsabilità di vagliare e di decidere. In qualche caso di dubbi, probabilmente, non ne aveva, e si trattava di gruppi che vantavano una storia più o meno lunga e ai quali l'arcivescovo mostrava di acconsentire, purché si mantenessero nei limiti delle coordinate dettate dalla gerarchia e dal proprio statuto<sup>39</sup>, oppure di proposte che utilizzavano strumenti di apostolato cui Montini era predisposto per formazione e che già aveva avuto modo di conoscere. Si pensi a «Rinascita Cristiana», un movimento di apostolato laicale che si era sviluppato negli ambienti dell'aristocrazia e dell'alta borghesia subito dopo la seconda guerra

<sup>36</sup> ADM, ASAM, 144, 1103, relazione dattiloscritta allegata alla lettera di Oggioni del 17 luglio 1959.

<sup>37</sup> ADM, ASAM, 144, 1103, lettera di Montini a mons. Giovanni Rigamonti, datata 14 maggio 1958.

<sup>38</sup> ADM, ASAM, 144, 1103, lettera di Montini a Oggioni datata «Festa della Presentazione della Beata Vergine, 1959». L'approvazione della «Pia Unione Maria Regina» sarebbe stata accordata da Montini, per una seconda volta, nel 1963. Richiesto di un parere dall'arcivescovo, Oldani, in occasione del rinnovo dell'approvazione, si era detto favorevole, anche se aveva notato «una certa stanchezza» tra le persone che avevano dato vita alla «Pia Unione» e l'incapacità di «incidere profondamente ed attirare» (appunto dattiloscritto su carta intestata di mons. Luigi Oldani).

<sup>39</sup> È il caso dell'Associazione Scoutistica Cattolica Italiana, cui Montini riservava attenzioni e apprezzamenti, per i quali rimando a L. Caimi, *L'associazionismo giovanile nell'esperienza di Montini arcivescovo*, in *Educazione, intellettuali e società in G.B. Montini-Paolo VI. Giornate di studio, Milano, 16-17 novembre 1990*, cit., p. 82. Occorre tuttavia ricordare le apprensioni, manifestate da Montini in più occasioni, per il fatto che qualche iniziativa sembrava aprire il fianco a derive ideologiche e a strumentalizzazioni politiche. Infatti nella corrispondenza dell'arcivescovo si trovano lettere di approvazione, come quella datata 26 ottobre 1956 che plaude alla «vitalità del caro movimento scoutistico» e ne sottolinea «la validità organizzativa e educativa» (ADM, ASAM, 132, 683, lettera indirizzata a Ettore Cunial, assistente ecclesiastico centrale dell'ASCI), ma anche cenni di preoccupazione, come nel caso di un incontro ecumenico organizzato dagli scout lombardi nel 1963, autorizzato da Montini «per evitare sconcerti», o di un convegno patrocinato nel 1955 dalla rivista dei *rovers* lombardi «Servire», con la partecipazione di gruppi giovanili confessionali, politici e sindacali, non esclusi quelli comunisti.

mondiale. Nata a Roma nel 1944 ed approvata da Pio XII, Rinascita Cristiana mirava a svolgere un'«azione positiva» in un contesto in cui si faticava a partecipare ad «associazioni di larghissima organizzazione», che abbisognava, a detta dei promotori, di un apostolato specifico, capace di rivederne abitudini e mentalità attraverso «una “presenza” e un'azione ispirata a un ideale cristiano». Questo movimento, in qualche modo, poteva essere ricondotto alla pastorale d'ambiente, o meglio la proporzionava – arricchendola di attenzione alla liturgia e alla dottrina sociale della Chiesa – a un ambito che mal sopportava l'associazionismo di massa e che era condizionato da codici di comportamento e da modi di pensare che denotavano un distacco marcato «tra la pratica esteriore della religione e gli usi e i costumi della [...] vita concreta»<sup>40</sup>. Vi si praticava la «revisione di vita», che era finalizzata a rieducare persone il cui ambito normale di esistenza non abituava a vivere coerentemente la fede e a combattere la mentalità individualistica e «appesantita da vecchi schemi», che pesava sin nelle attività caritative che erano tradizionale appannaggio di questi ceti<sup>41</sup>. L'arcivescovo si dimostrava interessato a questo tipo di apostolato, condividendone obiettivi e metodi<sup>42</sup>.

Quanto alle esperienze più difficilmente decifrabili per la loro novità o per la non perfetta sovrapposizione con la pastorale tradizionale, Montini richiedeva un insieme di garanzie molto circostanziate, che per lui erano condizione se non di sopravvivenza, quanto meno della possibilità di non incorrere nel biasimo dell'arcivescovo di Milano. Sono condensate in una lettera confidenziale spedita, nel 1960, a monsignor Giuseppe Damen, del Pontificio Collegio olandese. Lo spunto veniva dalla diffusione a Milano del Movimento del Graal, un'organizzazione internazionale la cui nascita risaliva all'Olanda degli anni Venti e che partecipava all'apostolato dei laici, accentuandone il contributo femminile. «È istituzione seria, approvata dalla Chiesa, vitale?», chiedeva l'arcivescovo; «quali sono le sue finalità? è movimento meritevole di favore e di

<sup>40</sup> ADM, ASAM, 146, 1189, dattiloscritto intitolato «Promemoria sul Movimento di 'rinascita cristiana'», datato gennaio 1960. Rinascita cristiana, divisa in due rami (adulti e giovani), aveva un'organizzazione diocesana che si strutturava in gruppi di una decina di persone (separati fra uomini e donne), con l'assistenza di un sacerdote. Per ogni diocesi doveva esserci un assistente nominato dal vescovo, scelto fra gli assistenti dei gruppi.

<sup>41</sup> ADM, ASAM, 146, 1189, dattiloscritto intitolato «Relazione di fine anno 1959 del Movimento di Rinascita Cristiana (gruppi signore) sul piano cittadino milanese», datato marzo 1960.

<sup>42</sup> Come dimostra la documentazione, nel 1957 Montini aveva manifestato il desiderio di conoscere i nomi di chi aderiva ai gruppi milanesi e le attività portate avanti a livello diocesano. E infatti la sua Segreteria conserva articolate relazioni preparate dai responsabili di Milano. Nel 1960, rispondendo alla relazione preparata dalla responsabile dei gruppi milanesi femminili, contessa Miriam Faina, Montini scriveva: «Ho ammirato nella Sua relazione come un impegno di fedeltà e di serietà sostenga il Movimento; ne conosco il metodo, altrettanto semplice, quanto razionale e efficace; e godo che uno spirito cristiano, genuino ed operante, pervada codesta esemplare e benefica attività. Veramente è da credere che chi vi partecipa senta in sé l'impressione dolce e forte della rinascita spirituale, e subito ambisca di comunicarla ad altri» (ADM, ASAM, 146, 1189, lettera del 9 aprile 1960).

sviluppo? come è governato? come può essere giudicato? come si comporta con le altre associazioni cattoliche e con l'autorità diocesana?»<sup>43</sup>. Questo incalzare di domande ben riassume le preoccupazioni di Montini, il cui metro di misura, dunque, stava sì nel comportamento dimostrato verso l'autorità ecclesiastica, ma al tempo stesso implicava che l'iniziativa desse prova di vitalità e quindi di capacità di attrazione, una capacità che, tuttavia, non doveva essere disgiunta dalla chiarezza dei fini e della struttura organizzativa, nonché dalla disponibilità a collaborare con le altre associazioni cattoliche. Da tutto ciò dipendeva il giudizio di Montini, che utilizzava questi elementi di valutazione pur dosandoli in base alle caratteristiche dell'esperienza esaminata e alla discrezione nei confronti delle persone coinvolte. Anche da questo punto di vista, infatti, si conferma la «pastorale dell'ascolto» che – come è stato notato – caratterizza la metodologia montiniana, un ascolto che implicava visite, udienze e contatti non episodici con le diverse situazioni, nonché indagini affidate riservatamente a persone di fiducia per avere il quadro di conoscenze che era preliminare a qualsiasi intervento<sup>44</sup>.

I fattori che sono stati evidenziati si ritrovano nell'atteggiamento che Montini ebbe nei confronti di uno dei fermenti più singolari emersi durante il suo episcopato, quello dei «sacerdoti della Fontana», un gruppo di cinque preti diocesani che – come scriveva l'arcivescovo – si proponeva di «approfondire la vita sacerdotale penetrandola con coraggioso impegno di spirito evangelico e di dare ad alcune parrocchie della “Bassa” un'assistenza pastorale particolare»<sup>45</sup>. Il gruppo operava presso sei parrocchie di piccoli centri agricoli che sorgevano nella periferia cittadina, coinvolgendo quattordici cascine e facendo perno sul santuario di Santa Maria alla Fontana di Locate Triulzi. Alle sue origini non c'era una chiara volontà di cercare vie particolari di apostolato né la consapevolezza di aver cominciato un cammino che avrebbe potuto dar vita ad esperimenti inediti. Semmai i sacerdoti che lo componevano, sollecitati dalle condizioni di miseria e di scristianizzazione della popolazione che era stata loro affidata<sup>46</sup> e desiderosi di sviluppare un lavoro apostolico capace di confrontarsi con la difficile situazione umana e sociale in cui versavano i contadini della

<sup>43</sup> ADM, ASAM, 116, 367, lettera del 22 aprile 1960.

<sup>44</sup> Adornato, *Nuove piste di ricerca*, cit., pp. 99 ss.

<sup>45</sup> ADM, ASAM, 226, 113, lettera indirizzata a don Giuseppe Zanoni, direttore spirituale dell'Istituto Ecclesiastico di Saronno, datata 24 luglio 1956. I sacerdoti della Fontana (Cesare Volonté, Paolo Banfi, Giulio Farina, Defendente Tettamanzi e Mario Riboldi) facevano riferimento alla guida spirituale di don Luigi Villa.

<sup>46</sup> In una relazione inviata a Montini don Volonté scriveva: «Affrontare un apostolato di conquista nel nostro ambiente non è cosa così facile; bisogna aver provato [a] recarsi in cascina ed essere stati maltrattati; penetrare nelle osterie ed essere osteggiati; cercare di avvicinare la gente e trovare una freddezza gelida... allora si comprende lo scoraggiamento, o peggio, del Sacerdote. È così che il problema di apostolato nella Bassa diventa problema di tensione, di santità sacerdotale» (relazione allegata alla lettera del 5 settembre 1955).

Bassa<sup>47</sup>, cercavano il consiglio dell'arcivescovo per chiarire anzitutto a se stessi il profilo e il significato dell'iniziativa. Tanto più che quest'ultima aveva coinvolto alcune ragazze che, abbandonata la famiglia di origine, avevano scelto di vivere in povertà come un «vero gruppo a comunità», per dedicarsi alla preghiera e all'apostolato nelle famiglie<sup>48</sup>. I sacerdoti avevano riconosciuto al loro interno un «superiore» ma non intendevano – né loro, né le giovani interessate alla loro esperienza – fondare una congregazione né dar vita a un istituto secolare. «Facciamo bene oppure sbagliamo?», chiedevano a Montini, sottolineando che non volevano sottrarsi all'autorità dell'arcivescovo ma anzi «renderla più vasta, più profonda e più vicina»; «ci aiuterà lei a trovare la forma esatta», aggiungevano<sup>49</sup>. Per Montini non si trattava però di un compito semplice. Nelle sue lettere ai sacerdoti della Fontana, da cui pure traspariva stima sincera<sup>50</sup>, ricorrono espressioni come «ho bisogno di un momento di tranquilla meditazione»<sup>51</sup> e di riflessione «davanti a Dio» prima di prendere una decisione<sup>52</sup>.

Tra l'arcivescovo e questo piccolo gruppo di preti, che poteva ricordare esperienze di apostolato tra i lavoratori per Montini da monitorare attentamente<sup>53</sup>, si sviluppava allora una sorta di approfondimento reciproco delle rispettive po-

<sup>47</sup> Sempre don Volonté, nella relazione a un convegno organizzato dalle ACLI nel novembre del '56, identificava sinteticamente gli obiettivi dell'«unione sacerdotale» di cui faceva parte, che mirava non solo a 'spiegare' la fede a una popolazione che faticava a comprenderla e che pensava e viveva in base a un vero e proprio materialismo pratico, ma anche a mutare i rapporti sociali, a risanare gli ambienti di vita e di lavoro e ad educare le persone (si veda lo schema della relazione conservato in ADM, ASAM, 226, 113).

<sup>48</sup> ADM, ASAM, 226, 113, lettera di don Giuseppe Zanoni a Montini, 14 febbraio 1958. Il sacerdote, che era stato incaricato da Montini di vigilare sull'iniziativa, faceva presente che le ragazze avevano lasciato il posto di lavoro e che, per mantenersi, lavoravano in casa «prendendo materiale da qualche industria». Si trattava però di un'occupazione non sicura, che non avrebbe garantito una vecchiaia serena.

<sup>49</sup> ADM, ASAM, 226, 113, lettera di Volonté a Montini, del 7 febbraio 1958. Il sacerdote aggiungeva che le ragazze avrebbero potuto semplicemente aderire all'Azione Cattolica e che non ambivano a trovare una forma specifica di aggregazione. Anche nella visita *ad limina* del 1961, nel materiale della quale si conserva un fascicolo intitolato «Associazione Parroci della Bassa», emerge tale indecisione sulla fisionomia del gruppo (ADM, ASAM, 323, 25/B). Lo stesso Volonté, che era stato riconosciuto punto di riferimento autorevole dagli altri sacerdoti, scriveva a Montini che «le cose erano ancora troppo imprecise» e che il gruppo non aveva in mente di creare un istituto secolare (ADM, ASAM, 323, 25/B, lettera del 14 ottobre 1959).

<sup>50</sup> Il 15 marzo 1958 Montini espresse in una lettera a Volonté il suo apprezzamento per l'«intensa e regolare vita spirituale» del gruppo, la «paziente ed assidua assistenza alla popolazione», la «conoscenza approfondita dei suoi mali, dei suoi bisogni e della sua ancor grande e superstite bontà», il «proposito di evangelizzazione metodica, umile, mite, esemplare e sincera», la «profonda fiducia nella grazia e nell'unione con Cristo» e il «desiderio di servire, com'essa insegna e vuole, la Chiesa» (ADM, ASAM, 226, 113).

<sup>51</sup> ADM, ASAM, 226, 113, lettera a Volonté del 27 maggio 1959.

<sup>52</sup> ADM, ASAM, 226, 113, lettera a Volonté del 15 marzo 1958.

<sup>53</sup> Le riserve di Montini nei confronti dei «preti operai» sono state notate da Potestà, *L'episcopato di G.B. Montini a Milano*, cit., pp. 111-112.

sizioni, perché Montini voleva capire fino in fondo la loro esperienza e i cinque preti volevano cogliere davvero il cuore del magistero di Montini. È interessante, a questo proposito, una lettera inviata da uno dei sacerdoti in questione a don Pasquale Macchi, dopo aver letto sull'«Italia» un discorso dell'arcivescovo ai dirigenti della GIAC. Ed è interessante perché rispecchia la difficoltà di decifrare il magistero dell'arcivescovo, presente sin da allora in diocesi e non estranea alla storiografia successiva. Montini, infatti, sembrava dire al tempo stesso cose vecchie e cose nuove e, proprio per questo, ci si poteva appellare alle sue parole sia con lo scopo di premere sull'acceleratore del rinnovamento sia, al contrario, per ingessare la pastorale diocesana dentro i ritmi organizzativi tradizionali. «Nessuna frattura col passato, nessun oblio dei suoi meriti», aveva detto Montini alla GIAC, frase scelta come sottotitolo dell'articolo del quotidiano cattolico, frase che però l'arcivescovo aveva completato parlando di un necessario «lavoro di rinnovamento»<sup>54</sup>. Il sacerdote che scriveva a don Macchi osservava che più volte, in quei giorni, gli era stato detto, da parte di chi aveva letto quel sottotitolo, che era «ora di finirla di pregare e di parlare di vita di Grazia e di vita interiore, per darsi ad un più grande attivismo». Chiedeva dunque lumi al segretario dell'arcivescovo, per essere sicuro di interpretarne correttamente il pensiero<sup>55</sup>.

Montini, da parte sua, riteneva di dover esaminare attentamente l'esperimento della Fontana, le cui peculiarità impressionavano anche il sacerdote, estraneo al gruppo, che era stato incaricato di vigilare e riferire. Anzitutto emergeva una «particolare concezione della vita sacerdotale», caratterizzata da un rapporto che voleva essere privilegiato con il vescovo, considerato alla stregua del superiore di un convento. I cinque preti, pur essendo pienamente inseriti nella vita parrocchiale, si pensavano come «frati, ma del vescovo», e infatti erano alla ricerca di un rapporto con lui non solo disciplinare e amministrativo, ma profondo e coinvolgente. In sostanza, erano pronti all'obbedienza integrale, che implicava l'amovibilità ma anche la messa a disposizione delle proprie risorse economiche. Tra loro, tuttavia, riconoscevano l'autorità di un «superiore», che doveva rappresentare il vescovo e che aveva il potere di definire le iniziative di apostolato nelle parrocchie di cui avevano la cura d'anime<sup>56</sup>. Nel gruppo,

<sup>54</sup> G.B. Montini, *Religione e apostolato*, in *Discorsi e scritti milanesi*, cit., vol. II, discorso ai dirigenti della GIAC diocesana, 12 agosto 1958, p. 2255. In effetti si tratta di uno dei discorsi più interessanti di Montini alla GIAC, sviluppato a partire dal difficile equilibrio tra salvaguardia della tradizione e necessità di «cercare espressioni più adeguate al clima del nostro tempo e al proprio impulso interiore» (p. 2256). Per l'arcivescovo l'approfondimento religioso andava di pari passo con l'apostolato giovanile. Gli sarebbe piaciuto che la GIAC – diceva – si ponesse «all'avanguardia di un movimento religioso rinnovatore. Abbiamo bisogno d'una religione autentica: ecco lo studio della nostra fede». Ancora: la Gioventù Cattolica doveva ritrovare in se stessa la freschezza della vita cristiana, sentendo «come bisogno, come effusione d'interiore pienezza, ancor più che come dovere, la capacità di espandersi e conquistare, di militare e di convincere» (pp. 2264-2265).

<sup>55</sup> ADM, ASAM, 226, 113, lettera di Volonté del 19 agosto 1958.

<sup>56</sup> ADM, ASAM, 226, 113, dattiloscritto intitolato «Note sul gruppo dei sacerdoti che

poi, era sviluppata la vita comune – i protagonisti ne parlavano nei termini di una «fraternità»<sup>57</sup> –, che significava preghiera comunitaria, giornate di ritiro e di studio, discussione dei problemi pastorali e messa in comune di abitazioni, beni e denaro. Gli interessati dicevano che lo «scopo primo» del loro tentativo era «uno sforzo di perfezione sacerdotale attraverso la vita comunitaria»<sup>58</sup>. Insieme a tale concezione del sacerdozio che, a detta di chi li sorvegliava, richiamava quella degli Oblati di san Carlo – sebbene i protagonisti non ne avessero coscienza –, vi era un metodo pastorale che comportava la «ricerca degli uomini sulle loro strade: nelle cascine, nelle case, nei granai, nelle stalle: una ricerca individuale», che tendeva ad escludere strumenti organizzativi per paura del formalismo. Dunque non si puntava su strutture come asili e oratori, né tanto meno su giochi e divertimenti per far proselitismo. Al centro della preoccupazione pastorale, invece, vi era la cura della spiritualità, perseguita attraverso il catechismo che era impartito in forma dialogica. «Lo scopo – scriveva il sacerdote incaricato da Montini di raccogliere informazioni – è di formare dei cristiani così che entrino nel mondo a creare strutture cristiane ed a cristianizzare quelle che ci sono». Terzo elemento emerso nell'indagine era un «metodo di vita personale» segnato da austerità, penitenza e tendenza alla mortificazione, tutti fattori che facevano propendere per un giudizio favorevole dell'esperimento, valutato come «altamente positivo e [...] assai benefico per 'la Bassa', nonostante affiorasse un qualche eccesso di «ascetismo», che era forse da contenere»<sup>59</sup>.

I sacerdoti della Fontana volevano però incontrare l'arcivescovo per raccontargli la propria esperienza, fugando dubbi e avendo la possibilità di smentire maldicenze e dicerie che qualcuno aveva propalato<sup>60</sup>. Montini non si sottraeva all'incontro e, insieme a Pignedoli, visitava Santa Maria alla Fontana, sottoponendo peraltro la questione al vicario generale Schiavini e sollecitando, al contempo, riflessioni e aiuti in diocesi, a favore dell'azione pastorale nella Bassa<sup>61</sup>. Sebbene fosse certo del «desiderio di santificazione e di bene» che

lavorano in alcune parrocchie della Bassa», firmato da don Giuseppe Zanoni e datato 11 dicembre 1956.

<sup>57</sup> ADM, ASAM, 226, 113, lettera di Volonté a Zanoni, del 7 dicembre 1957.

<sup>58</sup> ADM, ASAM, 226, 113, foglietti dattiloscritti inviati da Volonté a Montini, datati 1° maggio 1955. «Non vedo come si possa distinguere la mia santificazione personale dal mio apostolato», aggiungeva il sacerdote.

<sup>59</sup> ADM, ASAM, 226, 113, dattiloscritto intitolato «Note sul gruppo dei sacerdoti che lavorano in alcune parrocchie della Bassa», cit.

<sup>60</sup> Lo scriveva a Montini mons. Alberto Castelli, che era in contatto con i sacerdoti della Fontana: «Sono convinto», annotava nella lettera del 15 dicembre 1957, che «troppi sacerdoti esagerano nella lotta che fanno contro di loro. Comprendo che la loro via e il loro metodo di apostolato possono essere un tacito rimprovero, ma temo che ci sia un accanimento ingiustificato» (ADM, ASAM, 226, 113).

<sup>61</sup> La Giunta di AC decideva infatti di creare un ufficio che doveva favorire le attività religiose delle parrocchie della Bassa, mettendosi a disposizione del clero. L'ufficio era affidato a don Silvio Contini, direttore spirituale del Collegio San Carlo, a don Giuseppe Lattanzio, direttore spirituale

animava questi sacerdoti, a non convincerlo vi era – come scriveva – «qualche loro singolarità, che li distingue dai Confratelli e li fa qualche [*sic*] po' critici del vivere ecclesiastico». Proprio per questo aveva disposto che l'iniziativa fosse «amorevolmente vigilata [...]. Bisogna vedere» – aggiungeva –, dando tempo al tempo. «Come giovani fervorosi e virtuosi, preferiscono parlare di spirito, e non di regola – osservava ancora l'arcivescovo –; ma questa già se la stanno creando», con il risultato che, invece di trovare spirito e regola nella tradizione degli Oblati, come Montini aveva sperato, i sacerdoti della Fontana finivano per vagheggiare una formula «presa d'oltralpe»<sup>62</sup>. Nel 1958 l'arcivescovo, sollecitato più volte dai diretti interessati, metteva nero su bianco le sue perplessità: in primo luogo non gli sembrava opportuno che facessero riferimento a un superiore costituito all'«interno del gruppo amichevole», perché ciò avrebbe allentato i rapporti con la diocesi, «creando un nucleo singolare ed isolato, incline a farsi regole proprie e relativamente autonome»<sup>63</sup>. Quanto alle ragazze che collaboravano con i cinque sacerdoti, Montini esortava a non allontanarle dalle loro case e a non legarle a un «programma esteriore di vita diverso da quello a cui sono tenute dalle loro condizioni familiari e sociali». La stessa predicazione dei sacerdoti della Fontana doveva conservarsi «autentica e normale, conforme allo spirito del Vangelo e della Chiesa», senza suscitare, «neppure per desiderio di fervore e di perfezione, spiritualità inquiete o singolari»<sup>64</sup>.

Evidentemente le riserve di Montini sollecitavano, dall'una e dall'altra parte, interessamenti dall'alto. Nella documentazione si parla del coinvolgimento di «altra sfera giuridica e spirituale, che non quella diocesana e pastorale». In ogni caso, l'arcivescovo assicurava di non voler deviare l'orientamento dei sacerdoti della Fontana «se lume di sapienza divina e di prudenza ecclesiastica» avesse dimostrato di guidarli<sup>65</sup>. Diversa intonazione si trova nei documenti che

dell'Istituto Gonzaga, e a don Luigi Carcano, parroco di Civesio. Nelle carte di Montini si trovano alcuni appunti manoscritti nei quali l'arcivescovo avanzava varie idee per incrementare l'azione pastorale nella Bassa milanese.

<sup>62</sup> ADM, ASAM, 226, 113, lettera di Montini a Zanoni, 24 luglio 1956.

<sup>63</sup> ADM, ASAM, 226, 113, lettera di Montini a Volonté, 15 marzo 1958. «Volete aiutarvi nel ministero e santificarvi insieme?», continuava l'arcivescovo; «vi basti il vincolo d'una buona amicizia, che vi faccia gustare qualche preghiera comune, che vi raccolga in qualche conversazione esortatrice, e vi disponga a qualche fraterna collaborazione; ma non legatevi con obblighi reciproci di comando e di soggezione».

<sup>64</sup> *Ibid.*

<sup>65</sup> ADM, ASAM, 226, 113, lettera di Montini a Volonté, dell'ottobre 1959. Nella corrispondenza si fa riferimento all'interessamento di padre Arcadio Maria Larraona, segretario della Congregazione dei religiosi. Qualche analogia si può riscontrare tra l'atteggiamento che Montini ebbe nei confronti dei sacerdoti della Fontana e quello dimostrato verso don Paolo Villa, un sacerdote diocesano che era stato assistente delle ACLI, poi «cappellano» presso gli alberghi popolari e i ricoveri per sfrattati di Milano, ma che per anni chiese a Montini di potersi staccare dalla diocesi per entrare nella congregazione dei Piccoli Fratelli di Gesù ispirati a Charles De Foucauld. L'arcivescovo resistette a lungo a questa prospettiva, essendo persuaso che fosse meglio, per un prete diocesano, rimanere al servizio della diocesi per il quale si era formato, senza «cercare altrove altre forme di santificazione e di apostolato» (ADM, ASAM, 231, 472, lettera a don Villa



si riferiscono al cosiddetto «Movimento ‘Apostolato della Santità’», che era patrocinato da un domenicano ma che venne scoraggiato ben più decisamente dall'arcivescovo. Tale «movimento spirituale» era stato fondato con lo scopo di suscitare «vocazioni qualificate» attraverso un'intensa vita di preghiera e l'esercizio della carità. Potevano appartenervi, nelle intenzioni del promotore, religiosi, sacerdoti e laici che ne facessero richiesta, pur non rompendo eventuali vincoli verso la regola professata<sup>66</sup>. Dopo aver sentito il parere di Figini, Montini negava però l'approvazione<sup>67</sup>. Le ragioni sono elencate in un dattiloscritto non firmato, che è l'esito delle consultazioni volute dall'arcivescovo: l'iniziativa non pareva «sufficientemente giustificata», rientrando in realtà «negli impegni consueti della vita cristiana». Il motivo di maggior perplessità era però un altro: «L'approvazione d'un Movimento», si legge in questa memoria, «non è piccola cosa. D'altronde un “movimento” non si presenta in figura canonica riconosciuta. Trattandosi perciò di attività, che esula dagli schemi ordinari del Diritto canonico, l'approvazione dovrebbe venire dalla Santa Sede, anche perché l'iniziativa non sarebbe localizzata alla sola diocesi di Milano». Al di là dell'effettivo peso dell'Apostolato della Santità in diocesi, che era ancora da verificare, la materia per Montini oltrepassava le competenze del vescovo, ponendo il problema della nascita di aggregazioni spontanee tra i fedeli, al di fuori dell'associazionismo ufficiale<sup>68</sup>. A questo proposito Montini mostrava di

del 16 giugno 1958). Anche in questo caso, infatti, la prudenza dell'arcivescovo e l'attaccamento alle forme tradizionali di servizio alla Chiesa gli impedivano di far proprie le aspirazioni del giovane sacerdote, il quale faticava a far coincidere la propria vocazione a una vita di preghiera e povertà con le forme e i modi della pastorale diocesana. Il carteggio tra i due continuò dal '57 al '62, quando don Villa fece la sua professione religiosa entrando nei Piccoli Fratelli. Montini, infatti, non senza difficoltà l'aveva lasciato libero di seguire il suo desiderio, attribuendo però a lui «la responsabilità d'un tale passo» (lettera del 10 novembre 1960). La vicenda è ricostruita nel volume di U. Dell'Orto (ed.), *Se tale sembra essere la volontà del Signore... Carteggio inedito tra l'arcivescovo Giovanni Battista Montini e il sacerdote diocesano don Paolo Villa (1957-1960)*, Cinisello Balsamo, San Paolo, 2007, dove si pubblicano quasi tutte le lettere conservate nell'Archivio della Segreteria dell'Arcivescovo. La documentazione conservata in Archivio dimostra ancor più il travaglio non solo del sacerdote, ma dello stesso arcivescovo, come denotano gli appunti manoscritti presenti sulle lettere e in qualche foglio isolato.

<sup>66</sup> Si vedano la bozza di statuto e una «Breve cronistoria» (datata 24 febbraio 1961) conservate in ADM, ASAM, 226, 113. «Si tratta di un impegno semplice – scriveva padre Innocenzo Casati, il domenicano che sosteneva l'Apostolato della Santità –: che ognuno, nel proprio stato, adempia i propri doveri con fedeltà, cercando di realizzare la propria perfezione personale con la precisa intenzione apostolica di ottenere che Dio susciti vocazioni di anime consacrate a Lui nello stato Religioso o Sacerdotale [...], e che aiuti con la Sua grazia a convertire i peccatori. Non c'è nessun impegno giuridico speciale, ma solo quello di adempiere con fedeltà i doveri del proprio stato. Non c'è neanche l'obbligo di una determinata Regola di vita o una determinata spiritualità».

<sup>67</sup> ADM, ASAM, 239, 814, lettera a padre Casati del 23 marzo 1961.

<sup>68</sup> ADM, ASAM, 239, 814, dattiloscritto datato marzo 1961 e intitolato «Circa il “Movimento” per l'Apostolato della Santità: se possa essere approvato lo Statuto proposto dal Rev.mo P. Innocenzo Casati, O.P.». A padre Casati Montini consigliava di dare sviluppo all'iniziativa in forma privata e personale (lettera del 28 febbraio 1961).

non voler accelerare i tempi e si diceva convinto che la questione, causa per lui di preoccupazione, meritasse attenta considerazione per il bene della Chiesa<sup>69</sup>.

L'arcivescovo lo ribadiva pronunciandosi su un altro «movimento» spirituale, il Fraterno Aiuto Cristiano, che era stato fondato da un salesiano indipendentemente dalla sua congregazione e con il sostegno di Mondo Migliore di padre Lombardi, con lo scopo di animare una «Chiesa viva» dentro la struttura parrocchiale tradizionale<sup>70</sup>. Con il permesso di Schuster, il FAC aveva stabilito la propria residenza in una villa in provincia di Varese, per farne il centro «radiante» di un'iniziativa a dimensione extra-diocesana. Già diffuso in Italia e all'estero, mirava ora a radicarsi nella diocesi ambrosiana organizzando convegni e giornate di studio per laici e sacerdoti e creando, nelle parrocchie, «collegamenti» formati da laici. «Ma con quali programmi, con quali metodi, con quali ordini?», si chiedeva Montini, notando che al fervore dei propositi non faceva «sempre riscontro la dovuta esattezza dei concetti e dei termini». E poi, «con quale conoscenza dei piani pastorali, delle leggi sinodali, delle norme diocesane e pontificie? Con quale coordinamento con l'Azione Cattolica e con le altre non poche associazioni ed attività?»<sup>71</sup>. Il timore di Montini era che l'iniziativa fosse appannaggio esclusivo di chi l'aveva fondata e che, con attività non programmate dalla pastorale diocesana, creasse difficoltà nelle parrocchie<sup>72</sup>. Pignedoli gli aveva consigliato di verificare le condizioni definite da Schuster e di far fronte alle richieste del promotore con la notazione che la diocesi di Milano, anche per la sua vastità, aveva «particolari esigenze di unità nel lavoro pastorale e nelle attività delle Associazioni». Se il FAC avesse voluto ottenere una sua collocazione all'interno di questo quadro, avrebbe dovuto procurarsi un mandato dalla Commissione episcopale per l'Azione Cattolica<sup>73</sup>.

Nelle carte di Montini sono conservati diversi appunti che dimostrano un lavoro di valutazione lungo e puntuale, non tanto sulla persona del promotore e sulle sue intenzioni – ritenute «ottime» –, ma sull'opportunità che un movimento di tal natura prendesse piede nell'orizzonte parrocchiale ambrosiano. Vi era

<sup>69</sup> ADM, ASAM, 140, 972, lettera del 27 febbraio 1957 a don Paolo Arnaboldi, un salesiano che aveva fondato il Fraterno Aiuto Cristiano.

<sup>70</sup> ADM, ASAM, 140, 972, dattiloscritto intitolato «Pro memoria sul movimento FAC», firmato da don Arnaboldi e datato 8 maggio 1955. Il FAC era nato negli anni Quaranta nel Padovano, con il sostegno di don Calabria. Si presentava come un «movimento di rieducazione all'amore genuino e fattivo di Gesù» e come «mobilitazione di tutti i cristiani per l'attuazione del precetto dell'amore, [...] in perfetto aggiornamento coi tempi» (opuscolo *Il FAC non è un'opera caritativa*, a cura del FAC, Velate-Varese, 1955, p. 7). Si diceva alle dipendenze della gerarchia ecclesiastica e mirava a rinnovare la vita parrocchiale, mettendosi a disposizione del parroco.

<sup>71</sup> ADM, ASAM, 140, 972, lettera di Montini al cardinale Valerio Valeri, prefetto della Congregazione dei religiosi, datata 16 dicembre 1957. La Villa Sorriso di Maria si trovava a Velate di Varese.

<sup>72</sup> ADM, ASAM, 140, 972, lettera al cardinale Pietro Ciriaci, prefetto della Congregazione del Concilio, datata 16 dicembre 1957.

<sup>73</sup> ADM, ASAM, 140, 972, appunti firmati Pignedoli e datati l'uno 24 marzo 1956 e l'altro 11 giugno 1958.

l'indeterminatezza del profilo canonico a sconsigliare tale diffusione, insieme al problema del coordinamento non solo con le parrocchie e con l'Azione Cattolica, ma con i molteplici «fermenti» che si stavano sviluppando in diocesi al di fuori della pastorale ordinaria. E se ci fossero state interferenze? E poi, si chiedeva Montini, «se si cambia programma? quale il progr[amma] più autorev[ole]? Se si autorizza a lavorare sul campo altrui?». Proprio il programma del FAC, del resto, non dava sufficienti garanzie dal punto di vista liturgico e sacramentale, che per l'arcivescovo doveva essere al centro dell'azione pastorale. Ancora: nella sede del FAC si riunivano gruppi di laici, uomini e donne, senza alcuna preoccupazione per la «promiscuità». Come è noto, anche questo elemento suscitava le apprensioni di Montini. Eventualmente il FAC – ipotizzava l'arcivescovo – avrebbe potuto «fungere da organo di studio di programmi diocesani»; ma l'«Azione Cattolica resta la sola organiz[zazione] dei laici obbligatoria per i Parroci – e la prima fra quelle che dipendono dall'Aut[orità] Eccl[esiastica] o che promuovono l'apostolato fra i laici»<sup>74</sup>.

Dopo molte insistenze del salesiano che era all'origine dell'iniziativa e che si dovevano al fatto che Montini aveva preso parecchio tempo per «riflettere e pregare», arrivava la decisione dell'arcivescovo, rafforzata dagli orientamenti delle congregazioni vaticane<sup>75</sup>. Pur perseguendo un nobile scopo, il FAC – scriveva Montini – propone «iniziative di nuova invenzione, le quali suscitano momenti di fervore, ma autorizzano le Parrocchie a preferirle al programma loro proprio, introducendo attività buone, ma arbitrarie, con scapito dell'uniformità, della disciplina, della continuità». Una lavoro pastorale «di larghe vedute e di efficaci propositi non può prescindere da un rapporto intimo e operante con un piano ideale-teologico e liturgico», un piano – aggiungeva Montini – che compete all'autorità diocesana e non può essere affidato all'«arbitrio dei subalterni»; un piano, ancora, che «non può trascurare le tradizioni proprie d'una diocesi, specialmente se esse sono collaudate dalla santità di chi le ha iniziate e dalla fedeltà di una secolare osservanza»<sup>76</sup>. Nonostante il rammarico

<sup>74</sup> ADM, ASAM, 140, 972, appunti dattiloscritti e manoscritti (la calligrafia è di Montini).

<sup>75</sup> ADM, ASAM, 140, 972, lettera ad Arnaboldi del 5 settembre 1957. Montini «non ved[eva] come si pot[esse] autorizzare» il FAC «senza che la Santa Sede a[vesse] dato in proposito qualche istruzione» (lettera al cardinale Valeri del 16 dicembre 1957). Chiedeva dunque consiglio a Dell'Acqua, a padre Larraona e a mons. Guido Augustoni, presidente del Collegio dei parroci urbani. Mons. Francesco Roberti, segretario della Congregazione del Concilio, il 9 luglio 1958 gli scriveva che la Congregazione era estranea al FAC. Precedentemente era stato il cardinale Ciriaci, prefetto della Congregazione, ad assicurare a Montini che quest'ultima non aveva fatto alcun intervento in merito al FAC (lettera dell'8 febbraio 1958). Don Arnaboldi, al contrario, aveva sostenuto che il FAC godeva dell'appoggio vaticano e della CEI. Montini aveva voluto sentire anche il parere di don Renato Ziggiotti, rettore maggiore dei salesiani.

<sup>76</sup> «Il Signore – continuava Montini – non ha fondato solamente una religione o avviato un movimento, ha fondato una Chiesa, che noi dobbiamo servire secondo le sue leggi, più che secondo il nostro talento» (ADM, ASAM, 140, 972, lettera di Montini ad Arnaboldi datata 5 settembre 1957). Per la centralità della vita liturgica nel cristianesimo «essenziale» di Montini, si veda Marcocchi, G.B. *Montini. Scritti fucini*, cit., pp. 30-33, il quale sottolinea che, sin dai

per aver dovuto «assumere figura di chi mortifica un'attività promettente e certo suggerita da sincero desiderio di bene»<sup>77</sup>, Montini dimostrava, ancora una volta, di rifarsi a una visione di Chiesa che era anzitutto istituzione gerarchica, organizzata non in base alle predisposizioni personali di sacerdoti o laici particolarmente zelanti e fervorosi, ma sulla scorta della legge canonica, che era da tutelarsi scrupolosamente, senza che esperimenti da essa non previsti ne mettessero in discussione il livello di maturazione che aveva raggiunto. Dunque, in mancanza di un riconoscimento ufficiale della Santa Sede o della CEI, un'«iniziativa privata» come quella del FAC, che aveva «per campo di svolgimento l'organismo parrocchiale» e che intendeva creare «un nuovo movimento per laici», non poteva essere approvata dall'arcivescovo<sup>78</sup>.

Altri i casi di diniego dell'approvazione, a volte con il tentativo, da parte di Montini, di rimandare contatti diretti con chi avanzava proposte che non solo si collocavano al di fuori della tradizione diocesana, ma le cui caratteristiche sapevano troppo di sperimentalismo cristiano. Si pensi al «processo di ricerca» compiuto da una decina di laici, uomini e donne, che si erano spontaneamente riuniti in una «società ecclesiale», decidendo di vivere insieme «da uomini religiosi e provenienti dal deserto della vita e della cultura contemporanea»<sup>79</sup>. Il gruppo, che Schuster aveva tenuto in «una posizione di attesa» affidandolo alla sorveglianza di un cappuccino<sup>80</sup>, era composto da due famiglie impegnate nell'affido familiare e da alcuni giovani. Al centro di un percorso di chiarificazione che doveva essere stato difficile e che non si poteva dire concluso vi era la convinzione di dover sottolineare la dimensione sociale della vita della Chiesa, che si declinava a partire dalla «cellula base della società», la famiglia, e che si strutturava attorno all'autorità civile e a quella religiosa. Il gruppo scriveva a Montini di essere alla ricerca di modalità per sviluppare le relazioni reciproche

tempi della FUCI, per lui la liturgia era luogo privilegiato per entrare in comunione con Cristo e dunque mezzo di educazione alla fede. Montini pensava alla Chiesa come a una realtà mistico-sacramentale e non amava gli atteggiamenti pietistici e la predicazione intrisa di moralismo.

<sup>77</sup> ADM, ASAM, 140, 972, lettera ad Arnabodi del 19 giugno 1958.

<sup>78</sup> *Ibid.* «Chi garantisce la sua ortodossia? la sua continuità?», continuava Montini. «Non è piccola cosa dare piani ed ordini direttivi a delle parrocchie, mediante sacerdoti e laici governati da fuori: una parrocchia non può essere esposta ad esperienze arbitrarie, o discontinue, innovatrici; se ora dura fatica ad attuare un programma obbligatorio, come ne attuerà un altro facoltativo?». Per la visione ecclesiologicala tradizionale cui faceva riferimento Montini si vedano Potestà, *L'episcopato di G.B. Montini a Milano*, cit., pp. 98-99, e G. Adornato, *Parte terza*, in X. Toscani (ed.), *Paolo VI. Una biografia*, Roma-Brescia, Studium-Istituto Paolo VI, 2014, p. 282.

<sup>79</sup> ADM, ASAM, 182, 1092, lettere dattiloscritte di Cesare Emilio Gaslini all'arcivescovo, senza data ma risalenti al periodo dell'entrata in diocesi di Montini. Dal questionario compilato in occasione della visita *ad limina* e datato 9 ottobre 1959 si viene a sapere che tale «associazione di fatto», composta da una decina di persone, viveva comunitariamente da circa un decennio. «Si tratta di persone che vivono una vita comune, con amministrazione comune e beni in comune nella ricerca del Regno di Dio e della sua giustizia» (ADM, ASAM, 323-25/B).

<sup>80</sup> ADM, ASAM, 182, 1092, lettera di mons. Vittore Maini al vicario generale Schiavini, datata 19 gennaio 1955.

tra questi punti focali dell'organizzazione sociale, che non potevano prescindere l'uno dall'altro a pena di una deriva individualistica che era da condannare. All'arcivescovo questi laici chiedevano la «reciprocità di un colloquio che solo testimonia della comunione cristiana, delle nostre ricerche, esperienze e possibili soluzioni, certi che potrebbero venirne conseguenze positive per molti»<sup>81</sup>. Dopo aver resistito qualche tempo all'invito, Montini incontrò il responsabile del gruppo, nonostante le segnalazioni negative ricevute sul conto di questi giovani<sup>82</sup>. Il prevosto della parrocchia cui facevano riferimento aveva mandato rassicurazioni, che forse l'avevano tranquillizzato<sup>83</sup>. L'approccio di Montini all'esperienza di questa sorta di «nuova comunità» è ben documentato, tuttavia, da un appunto dattiloscritto in cui egli annotava che la possibilità di un rapporto sincero e stabile tra l'autorità diocesana e il gruppo che chiedeva appoggio e comprensione dipendeva dall'abbandono delle «forme singolari di pensiero e di tratto, che non danno affidamento di buon equilibrio» sulle «idee religiose [e] sui [...] propositi pratici». Seguisse – aggiungeva Montini – «con maggiore semplicità ed aderenza le vie normali della vita cristiana e della ricerca della perfezione». A certe «originalità non ammissibili» l'arcivescovo contrapponeva le «buone consuetudini della vita cattolica»<sup>84</sup>.

«Le vie normali della vita cristiana» rimanevano dunque, per Montini arcivescovo, la strada maestra da non abbandonare per non incorrere in avventure che avrebbero potuto mettere a repentaglio l'ortodossia e la centratura ecclesiale delle diverse iniziative. Ciò non significava, però, angustia di orizzonti

<sup>81</sup> ADM, ASAM, 182, 1092, lettera a Montini non firmata ma spedita dal gruppo, datata «Settimana Santa 1955».

<sup>82</sup> L'8 giugno 1958 Piero Zerbi aveva scritto a don Macchi per avanzare alcune critiche all'esperienza portata avanti da questo gruppo di famiglie. Si trattava – a detta di Zerbi – di «una sorta di 'comunità', anzi di una «nuova comunità» che si dedicava allo studio della Bibbia e del Vangelo. Il monsignore intravedeva qualche cosa di «poco chiaro» in tale esperienza (ADM, ASAM, 182, 1092).

<sup>83</sup> Così scriveva a don Macchi: «Si stia tranquilli: lasciamoli fare. Sono occupati tutto il giorno nei loro impieghi. Niente studio speciale di Bibbia e di Vangelo. Assicura chi scrive che per ora, non spunta nessuna eresia» (lettera manoscritta di don Pietro Lajolo datata 17 giugno 1958, su carta intestata della parrocchia prepositurale di Sant'Agostino).

<sup>84</sup> Appunto dattiloscritto datato febbraio 1955 a spedito a mons. Maini, che il gruppo voleva come proprio riferimento spirituale (ADM, ASAM, 182, 1092). «Sappiano che camminando per questa via – continuava Montini – nulla sarà perduto di quanto è bene nei loro desideri di vita cristiana. Avranno il merito dell'obbedienza alla Chiesa». Maini, che aveva avuto alcuni contatti con il gruppo, aveva fatto sapere le sue impressioni: si trattava di giovani che lavoravano insieme in un laboratorio e che provenivano «da esperienze varie e qualche volta disastrose, della vita studentesca e post-studentesca», «spinti dal desiderio di elaborazione autonoma di una religiosità, pur nei limiti segnati dall'obbedienza alla Chiesa, dalla pratica dei sacramenti e dai principi della Fede». Il sottoscritto – scriveva Maini – «si comportò con loro con la tattica sperimentata di fronte a persone nelle quali il sentimento sovrabbonda alla ragione: lasciar libero sfogo al loro eloquio, dopo il quale sono soddisfatti senza chiedere conclusioni» (lettera al vicario generale datata 19 gennaio 1955). Montini incontrò il responsabile del gruppo alcune volte (le carte parlano di un incontro nel '55 e di due incontri nel '57) e lo affidò alla direzione spirituale del prevosto della parrocchia in cui operava.

e chiusura entro ambiti di formazione ristretti e, proprio per questo, asfittici. Montini lo ribadiva a proposito di un piccolo gruppo di giovani – anch'esso sorto con il permesso di Schuster<sup>85</sup> – che si radunava attorno a un sacerdote con finalità spirituali, mettendo al centro del proprio programma la vita eucaristica. «Tutto va bene», notava Montini, «purché l'assistenza al piccolo gruppo non faccia dimenticare le necessità dell'assistenza a tutta l'altra gioventù tanto bisognosa di chi la ricerchi, la raccolga, la educi». L'arcivescovo esortava a un'attitudine missionaria che non poteva accontentarsi della cura, per quanto scrupolosa, di qualche bravo giovane cattolico, e per di più all'interno delle mura rassicuranti di luoghi di culto protetti, cui si poteva accedere – come in questo caso – dopo essersi impegnati a rispettare una serie di pratiche di pietà. Ben altrimenti aperta alle dimensioni del mondo doveva essere la pastorale giovanile, i cui fondamenti spirituali andavano rafforzati non con qualche devozione particolare, bensì approfondendo i «punti essenziali della dottrina e della vita cristiana»<sup>86</sup>.

### 3. *Lontano dalle «vie normali»: il Movimento dei Focolari*

La prospettiva pastorale di Montini arcivescovo – lo si è visto – faceva riferimento a quelle che per lui rimanevano le «vie normali della vita cristiana», le quali si incentravano sui perni della tradizione ambrosiana, vale a dire le parrocchie e le associazioni di Azione Cattolica. Altre esperienze, tuttavia, avevano cominciato a percorrere strade inusuali e per molti versi inesplorate. È il caso, certamente, del Movimento dei Focolari, che all'arrivo in diocesi di Montini si stava diffondendo anche in terra ambrosiana<sup>87</sup> e che l'arcivescovo

<sup>85</sup> Schuster aveva introdotto qualche correttivo all'impostazione spirituale del gruppo. La «piccola società» si era data il nome «Magnificat» e raccoglieva una quarantina di giovani di varie età, avendo eletto come luogo di culto la cappella costruita all'interno dell'abitazione di don Fausto Bigi, animatore del gruppo (ADM, ASAM, 143, 1077, lettera dattiloscritta di Bigi a Montini, non datata). Bigi aveva mandato a Schuster una bozza di statuto, che doveva essere, nelle sue intenzioni, la carta fondativa di «Magnificat», associazione spirituale che perseguiva la «santità dei giovani, ragazzi e fanciulli», attraverso «una convinta e generosa devozione eucaristica» che avrebbe costruito «una profonda personalità cristiana, soda, interiore, coraggiosa». Su questa bozza, conservata tra le carte della Segreteria di Montini, si trovano correzioni autografe attribuibili a Schuster, finalizzate a non rendere troppo gravosi gli oneri che «Magnificat» chiedeva ai suoi aderenti di assolvere, come la «promessa» che erano chiamati a fare e le pratiche di pietà che dovevano svolgere quotidianamente (opuscolo *pro manuscripto* intitolato *Per gli amici eucaristici consacrati alla S. Madre di Dio*, senza data, pp. 3 ss.).

<sup>86</sup> ADM, ASAM, 143, 1077, lettera di Montini a Bigi datata 22 marzo 1956. Anche in questo caso l'arcivescovo invitava il sacerdote ad intendersi con il prevosto della parrocchia in cui il gruppo operava.

<sup>87</sup> A nome di mons. Enrico Nicodemo, presidente della Commissione della CEI incaricata di pronunciarsi sui Focolarini, Alberto Castelli, segretario della CEI, il 21 marzo 1960 chiedeva

già conosceva, per un primo approccio a Roma, ai tempi della Segreteria di Stato, e per il tramite di una famiglia bresciana che vi aveva aderito<sup>88</sup>. Ed è un caso per il quale la parola «fermenti» è particolarmente calzante, viste non solo le novità che lo connotavano ma anche le resistenze che tali novità si erano procurate, ai vertici della gerarchia ecclesiastica – basti pensare alla CEI – non meno che presso la base ecclesiale<sup>89</sup>. In realtà i pareri erano discordanti, e lo stesso Montini si confrontava con posizioni molto diverse, di cui, in qualche modo, doveva tener conto. La sua valutazione risentiva poi, inevitabilmente, della convinzione che «la via maestra per il servizio di Cristo» fosse quella stabilita dalla Chiesa, che ancora non contemplava esperimenti di questo tipo<sup>90</sup>. Il riferimento, in questo passaggio, era alla presenza di sacerdoti e di religiosi all'interno dei Focolari, che Montini giudicava inopportuna o perlomeno prematura, in attesa di un pronunciamento della commissione incaricata dalla CEI di valutare la questione, la quale, di lì a qualche tempo, si sarebbe detta contraria alla partecipazione del clero e dei religiosi al Movimento<sup>91</sup>. Ma

a Montini una relazione sul lavoro del movimento nella diocesi di Milano. Montini inviava un dattiloscritto che conteneva le notizie che era riuscito a raccogliere, dal quale si desume che, con il consenso di Schuster, nel 1950 erano stati costituiti a Milano due Focolari, uno femminile e uno maschile (ADM, ASAM, 106, 99, dattiloscritto intitolato «I Focolari a Milano»). Notizie sui Focolari milanesi e sulle persone che si erano consacrate e facevano vita comune sono anche nel materiale raccolto in occasione della *visitatio ad limina* del 1961: al ramo maschile facevano riferimento 35 persone, di cui 7 «interni», e a quello femminile 39, di cui 9 «interne» (ADM, ASAM, 323-25/B).

<sup>88</sup> Si trattava della famiglia Folonari, legata a Montini da rapporti di parentela. In Archivio si conserva corrispondenza scambiata con alcuni membri di questa famiglia, come Speranza Devoto Folonari, che interpellava Montini per chiedere il suo consenso, ad esempio, alla partecipazione di focolarini ad iniziative organizzate in diocesi (ADM, ASAM, 181, 1022).

<sup>89</sup> Tra le carte della Segreteria dell'arcivescovo si trovano alcune lettere anonime, una della quali firmata «Un Consiglio Dirigenti Lombardi dell'Azione Cattolica» e risalente all'8 febbraio 1959, di dura critica nei confronti del Movimento dei Focolari, accusato di «spietata propaganda» a danno delle associazioni cattoliche, di mancanza di «senso di sottomissione alla Chiesa» e di esaltazione e fanatismo. Ai Focolari si ascriveva, inoltre, una sorta di tentazione protestante, una libertà di rapporti fra maschi e femmine che veniva giudicata severamente e l'esagerazione con cui «adorano questa Chiara Lubich» (ADM, ASAM, 128, 575).

<sup>90</sup> Montini lo scriveva a un antico fucino, che gli aveva chiesto consiglio circa la volontà del figlio di entrare nel movimento dei Focolari diventando sacerdote: «Non mi pare sia da incoraggiare l'intenzione del caro giovane di aggregarsi ad un gruppo, certamente fervoroso e ben intenzionato, ma tuttora non approvato dalla Chiesa e non bene qualificato a qualche determinato servizio. Le forme poi di cui tale gruppo si riveste, non sono, come Ella dice, del tutto tranquillizzanti. Per me la via maestra per il servizio di Cristo è ancora quella del ministero pastorale sotto la guida e nella comunione del Vescovo» (ADM, ASAM, 189, 1807, lettera del 7 aprile 1959 a Cesare Sempio).

<sup>91</sup> Il cardinale Siri, presidenti della CEI, il 9 febbraio 1960 scriveva a Montini che, «per volontà dei Superiori, i Sacerdoti diocesani o religiosi, i Religiosi e le Religiose non possono appartenere al Movimento detto dei 'Focolarini', e non debbono partecipare a manifestazioni, pubbliche o private, indette da tale Movimento. Per eventuali deroghe, si ritiene possano aversi norme in un prossimo futuro» (ADM, ASAM, 106, 99). A una religiosa che si rivolgeva all'arcivescovo lamentando l'incomprensione della madre superiora e manifestando il proprio desiderio di aderire al movimento, Montini replicava che doveva «trovare nel Suo Istituto, nello spirito che lo anima,

non era solo questo il motivo della cautela dell'arcivescovo di Milano. Varie segnalazioni, infatti, gli arrivavano da persone i cui parenti erano stati coinvolti nella vita dei Focolari e che, preoccupate, gli chiedevano consiglio. Proprio Montini, nel '57, si era fatto interprete delle apprensioni di chi, pur stimando i singoli coinvolti, era in dubbio sulla collocazione ecclesiale dei Focolari. In una lettera al cardinale Pizzardo, segretario della Congregazione del Sant'Offizio, Montini, sebbene sottolineasse il «grande fervore religioso» dei focolarini che aveva conosciuto, scriveva che «non si comprende[va] ancora bene se questo movimento a[vesse] scopi determinati», autorità costituite e riconosciute, nonché norme direttive chiare. «V'è qualche aspetto – aggiungeva – che lascia qualche dubbio su l'insieme del movimento»<sup>92</sup>.

In effetti frenate e aperture di credito si alternano nella corrispondenza di Montini, come quando l'arcivescovo doveva parare l'attacco di padre Gemelli, che era stato sollecitato da un genitore la cui figlia era entrata nell'orbita focolarina. Montini rispondeva che la persona di cui si interessava il rettore dell'Università Cattolica «per età e per giudizio, [era] in grado di scegliere liberamente la via che ella crede[va] convenirle»<sup>93</sup>. Si trattava, certo, di uno spiraglio significativo, che implicava una fiducia non scontata nella libertà di opzione, purché fosse esercitata con consapevolezza e con cognizione di causa. Montini, dunque, mostrava una certa disponibilità a tenere aperta la questione senza arrivare prematuramente alle conclusioni, che rischiavano di essere negative; al tempo stesso, però, riteneva che la natura del fenomeno andasse esaminata accuratamente, per fugare dubbi persistenti, non cancellati dalle molte sollecitazioni che gli venivano da aderenti al movimento, a cominciare dall'assistente ecclesiastico don Paolo Foresi, che gli scriveva ripetutamente perché in lui intravedeva un possibile appoggio<sup>94</sup>. Una prima bozza di statuto era

nelle regole che lo sostengono, nelle persone che lo dirigono l'alimento di quel fervore [della carità] e la forma della propria santificazione. Il bene, che osserviamo negli altri, ci sia di esempio, non di distrazione» (ADAM, ASAM, 123, 495, lettera del 5 maggio 1960 indirizzata a Giuseppina Cazzaniga).

<sup>92</sup> Anche Montini si interrogava sulla devozione dei focolarini per Chiara Lubich, sul fatto che non si sapeva a quale autorità si riferissero e sulla tendenza a «parla[re] sempre di sé». Il rettore di Venegono, notava, aveva scoraggiato la propaganda degli aderenti al movimento all'interno del seminario (ADM, ASAM, 187, 1598, lettera del 19 luglio 1957). L'intervento di Montini presso Pizzardo era successivo a una lettera di don Pasquale Foresi, assistente ecclesiastico del Movimento, che lo metteva al corrente della situazione «romana» dei focolarini (dopo un incontro con padre Lombardi, suggerito dal cardinale Ottaviani) e gli chiedeva di riallacciare i rapporti. Sulla lettera la penna di Montini scriveva «non rispondere»; un altro appunto a mano dice «scrivere al S. Offizio per informazione» (ADM, ASAM, 128, 575, lettera del 27 ottobre 1956).

<sup>93</sup> Lettera a Gemelli del 23 settembre 1958 (ADM, ASAM, 122, 474). Gemelli gli aveva scritto richiamando «la riprovazione di numerosi Vescovi, per il modo con il quale [i Focolari] circuiscono e dominano le signorine» (lettera del 10 settembre 1958). La persona in questione, come si desume dalla corrispondenza, aveva 36 anni.

<sup>94</sup> Don Foresi era stato nominato assistente ecclesiastico dei Focolari dall'arcivescovo di Trento Carlo Ferrari, che nel 1947 aveva riconosciuto l'«Opera di Maria» fondata da Chiara Lubich. Nella corrispondenza di Montini si trovano parecchie lettere di Foresi, che informava l'arcivescovo dell'*iter*



stata inviata al Sant'Offizio il quale, prima ancora della CEI, si stava occupando dei focolarini. Da Foresi la riceveva, nel '59, anche Montini. A Milano, tuttavia, essa suscitava ulteriori perplessità, perché Pignedoli ne rilevava la genericità e la mancanza di «una linea concreta di attività proprie e specifiche», paventando anzi il pericolo «che i Focolarini divent[asser]o una “chiesa” nella Chiesa, aperta solo a parole, ma chiusa di fatto in una vita propria e sottomessa solo a parole ai Vescovi»<sup>95</sup>. Il risultato era l'«atteggiamento di attesa» di Montini<sup>96</sup>, cui faceva riscontro la sospensione di giudizio prima del Sant'Offizio e poi della commissione della CEI, che ritardava la prospettiva di un'approvazione canonica. Montini, comunque, faceva presente che una diffusione dei Focolari in diocesi era subordinata all'esame che lui stesso intendeva fare degli scopi e delle attività del Movimento<sup>97</sup>.

In ogni caso, l'arcivescovo non voleva pregiudicare l'esito dell'indagine in corso, che avrebbe potuto anche sfociare in una disposizione – come scriveva – non del tutto sfavorevole<sup>98</sup>. In realtà la commissione della CEI nel 1960 espresse un parere fortemente critico, ravvisando nei focolarini «un movimento infetto

seguito dal movimento per arrivare alla redazione di uno statuto per il quale richiedere il riconoscimento della gerarchia ecclesiastica (ADAM, ASAM, 128, 575, in particolare la documentazione del 1959). Montini era contattato anche da Igino Giordani, che aveva aderito ai Focolari.

<sup>95</sup> ADAM, ASAM, 128, 575, appunto dattiloscritto siglato da Pignedoli e datato 9 aprile 1959. Tra le carte di Montini si trova una lettera a Foresi datata 11 aprile 1959, su carta intestata dell'arcivescovo, che riproduceva le osservazioni di Pignedoli. Ad esse era aggiunto questo passaggio: «L'idea che muove il vostro proposito è quella della ricerca dell'unità. È da chiedersi se proprio per questa via non si sbocchi piuttosto ad una nuova frazione che ad una vera collaborazione con l'unità della Chiesa». Sulla lettera, tuttavia, è scritto a mano che non è stata spedita. A questa documentazione è accluso un dattiloscritto in più pagine intitolato «Compendio di alcune norme fondamentali da servire per le costituzioni dell'Istituto secolare 'Cuore Immacolato di Maria'».

<sup>96</sup> Lettera di Foresi a Montini del 9 febbraio 1959 (ADAM, ASAM, 128, 575). Il sacerdote chiedeva suggerimenti all'arcivescovo, non dimenticando che nel passato aveva aiutato i Focolari. Evidentemente si riferiva al periodo in cui Montini aveva lavorato alla Segreteria di Stato, durante il quale aveva avuto contatti con il Movimento ottenendo un'udienza alla fondatrice Chiara Lubich.

<sup>97</sup> In Archivio si conserva la brutta copia di una lettera di Montini a Foresi, datata 4 febbraio 1959: «Io non dubito del vostro fervore e delle vostre buone intenzioni, come so del bene che avete compiuto – scriveva l'arcivescovo –. Ma non posso nascondere la perplessità che mi resta nell'animo a riguardo del vostro movimento, che ancora non ha una figura così definita da meritare senza altro la fiducia e l'appoggio di chi ha la responsabilità delle anime nel campo di Dio [...]. Affinché il movimento sia riconosciuto occorre un'approvazione canonica, esplicita; tanto più che, come Ella saprà, da diverse parti, anche auto[revoli,] sono tuttora sollevate riserve circa cotesto movimento. E quand'anche l'approvazione canonica fosse data al Movimento stesso, sarebbe necessario che ne fossero ben esaminati gli scopi e si sapesse quali propositi di attività si prefigge, prima che se ne possa autorizzare lo svolgimento in Diocesi». La lettera presenta correzioni manoscritte di Montini (ADM, ASAM, 128, 575).

<sup>98</sup> Lo scriveva al vescovo di Brescia Giacinto Tredici (ADM, ASAM, 234, 512, lettera del 22 marzo 1960). Più ottimista si mostrava in una lettera spedita a Speranza Devoto Folonari il 9 maggio 1960, alla quale scriveva di credere che il problema del rapporto tra sacerdoti e religiosi, da una parte, e Focolari, dall'altra, potesse concludersi con una «definizione» che avrebbe «fini[to] favorevolmente ogni questione» (ADM, ASAM, 181, 1022).

da pseudo misticismo naturalistico che costitui[va] un pericolo per la genuinità della dottrina, per la saldezza della disciplina e per l'onestà del costume», e come tale non solo non poteva «essere approvato e incoraggiato, ma, a giudizio della Commissione non p[oteva] nemmeno essere corretto e riformato, ma d[oveva] essere sciolto in tutte le sua strutture e manifestazioni»<sup>99</sup>. Montini, presente all'assemblea plenaria della CEI del novembre 1960 dove venne presentata la relazione della commissione, espresse un punto di vista più sfumato: «Non discute i rilievi, che dimostrano come vi siano cose gravi dottrinali e pratiche, che non possono essere tollerate», si legge nella proposta di verbale che l'arcivescovo mandò al segretario della CEI riassumendo il suo intervento. «Tuttavia sembrano troppo recise alcune affermazioni, come il giudizio che i Focolarini siano irreformabili». Anche la «terapia» suggerita dalla commissione, e cioè lo scioglimento, sembrava a Montini inadeguata: «Forse è troppo semplicistica e radicale», affermava, «anche se si fosse di fronte a recidivi. Dalla discussione è risultato che quasi tutti i Presenti sono persuasi che il male va stroncato. Ma sarà difficile, con un semplice provvedimento di soppressione, convincere i focolarini dei loro torti»<sup>100</sup>. Ciò che Montini metteva in discussione non erano i rilievi critici, bensì il metodo suggerito per far fronte al problema. L'arcivescovo condivideva la preoccupazione per il sentimentalismo che – si sosteneva nelle conclusioni dell'inchiesta – inficiava la religiosità dei focolarini; inoltre temeva quella sorta di «suggestione collettiva» che diversi osservatori avevano colto nelle iniziative del movimento<sup>101</sup>. Non credeva, tuttavia, che si trattasse di una causa persa: qualche tentativo migliorativo si poteva e, forse, si doveva provare.

<sup>99</sup> Conferenza Episcopale Italiana, Commissione per i “focolarini”, Assemblea generale, Roma, 17-19 novembre 1960, p. 2/B (ADM, ASAM, 318, 11): si tratta del dattiloscritto, in molte pagine, che costituisce il verbale «riservato» dell'assemblea generale della CEI, contenente le conclusioni della commissione. È presente nelle carte di Montini essendo stato inviato all'arcivescovo da Alberto Castelli, segretario della CEI. Per il dibattito sui focolarini all'interno della CEI si veda F. Sportelli, *La Conferenza Episcopale Italiana (1952-1972)*, Galatina, Congedo, 1994, pp. 137-142. La CEI ne aveva già discusso nella seduta plenaria del 1959. Sino allora se ne era occupato il Sant'Ufficio, ma dopo tale discussione Giovanni XXIII rimise la pratica alla commissione presieduta da Nicodemo, arcivescovo di Bari, e composta da Luigi Boccadoro, vescovo di Montefiascone, Luigi Carlo Borromeo, vescovo di Pesaro, Giuseppe Carraro, vescovo di Verona, Placido Cambiaghi, vescovo di Crema, e dal segretario generale della CEI Castelli.

<sup>100</sup> «Però molti lo accetteranno se il male sarà reso noto», aggiungeva Montini: ADM, ASAM, 318-13, dattiloscritto intitolato «Proposte di ritocchi ai VERBALI della C.E.I. del Novembre 1960». L'arcivescovo lo inviava a Castelli con lettera del 27 dicembre 1960. Insieme a Montini, i cardinali Lercaro e Fossati erano intervenuti per attenuare un giudizio così severo. Si veda Sportelli, *La Conferenza Episcopale Italiana*, cit., p. 142.

<sup>101</sup> Lo dimostrano i segni apposti a mano dall'arcivescovo al verbale che gli aveva mandato Castelli (ADM, ASAM, 318, 11). Un altro elemento che lo faceva pensare era la tendenza ad identificare la volontà di Dio con quella di Chiara e di chi dirigeva il movimento, e dunque l'aspetto carismatico che la relazione della CEI aveva evidenziato. A Iginio Giordani scriveva che l'«appunto che si fa[ceva] al movimento [era] quello di non avere una fisionomia precisa e riconoscibile e d'essere piuttosto 'carismatico' che veramente ecclesiastico» (ADM, ASAM, 128, 575, lettera del 14 novembre 1960).

Quindi proponeva di «contestare le accuse che si fanno; di rendere pubblica la critica e la condanna; di dare altra direzione ecclesiastica». I focolarini, in questo modo, avrebbero dovuto difendersi per dimostrare la fondatezza religiosa ed ecclesiale della loro prospettiva. Uno scioglimento immediato, invece, a Montini pareva non solo doloroso per tanti, ma anche inefficace<sup>102</sup>.

La via prospettata da Montini risultò essere quella più opportuna. Prendendo atto delle conclusioni negative dell'inchiesta della CEI, il Sant'Offizio si fece carico della questione, ma non procedette allo scioglimento, chiedendo invece relazioni difensive e una chiarificazione sostanziale circa la «fisionomia» del movimento<sup>103</sup>. L'arcivescovo di Milano, nel frattempo, manteneva il più stretto «riserbo», dal momento che i Focolari – come scriveva a un ex-fucino che gli chiedeva consiglio – non avevano «ancora trovato un [...] regolare e soddisfacente orientamento»<sup>104</sup>. Probabilmente Montini continuò però ad occuparsene, o perlomeno i focolarini – come dimostra la sua corrispondenza – lo tennero informato delle proprie vicende<sup>105</sup>.

#### 4. *Dall'Azione Cattolica al movimento: Gioventù Studentesca e Gioventù Lavoratrice*

Se i Focolari apparivano come un movimento che si era sviluppato al di fuori della pastorale tradizionale, e per di più con uno stile aggregativo del tutto inedito e proprio per questo difficilmente valutabile, non così si può dire di un fenomeno che era nato e cresciuto dentro l'associazionismo cattolico e che poteva essere considerato, come era, un esperimento di Azione Cattolica. Il

<sup>102</sup> Sportelli, *La Conferenza Episcopale Italiana*, cit., p. 142.

<sup>103</sup> Lo si apprende da una «personale-riservata» di Foresi a Montini del 28 ottobre 1961, dove il sacerdote raccontava del sostegno ricevuto dall'episcopato tedesco, nonostante la bocciatura della CEI (ADM, ASAM, 128, 575).

<sup>104</sup> ADM, ASAM, 202, 3211, lettera a Lelio Ferrari del 31 gennaio 1962. Nel corso del 1962 il Sant'Offizio portò a termine il suo esame: i focolarini avevano manifestato il desiderio di organizzarsi come Pia Associazione «Opera di Maria», con l'intenzione di trasformarla poi in istituto secolare. Il Sant'Offizio ne aveva esaminati gli statuti, rimettendoli alla Congregazione del Concilio (competente per le pie associazioni) e comunicando che potevano essere attuati in via di esperimento. Rimaneva in vigore il divieto di far parte del movimento per sacerdoti e religiosi (ad eccezione dei focolarini che manifestavano la vocazione al sacerdozio). Inoltre veniva nominato un visitatore «incaricato di vigilare, con pieni poteri, sull'attuazione degli Statuti e su tutto il Movimento, per un periodo di prova» (ADM, ASAM, 128, 575, lettera del cardinale Ottaviani al cardinale Pietro Ciriaci, prefetto della Congregazione del Concilio, 23 marzo 1962). Montini, divenuto papa, avrebbe seguito l'evoluzione del movimento, contribuendo alla definizione della sua identità e alla ricerca di una forma istituzionale peculiare, all'interno dell'ecclesiologia del Concilio Vaticano II.

<sup>105</sup> Nelle lettere si parla di un'udienza concessa a Foresi nel febbraio del 1963 (ADM, ASAM, 128, 575, lettera del sacerdote del 22 febbraio 1963).

riferimento, naturalmente, è alla Gioventù Studentesca di don Luigi Giussani<sup>106</sup>, nata qualche tempo prima dell'entrata in diocesi di Montini e poi sviluppatasi durante il suo episcopato, con il coinvolgimento di migliaia di studenti non solo a Milano, ma in diverse città italiane. Arrivando in diocesi, Montini si era subito mostrato assai interessato al problema della pastorale nelle scuole pubbliche. Si trattava anzi, come scriveva a Pignedoli, di un pensiero che lo assillava, perché voleva garantire agli studenti delle scuole superiori milanesi «un'assistenza più efficace e sistematica. È questo il campo», osservava con la sensibilità di un antico fucino, «in cui si determina ora l'orientamento giovanile, anticipato su quello universitario, com'era un tempo; è ora insidiatissimo da correnti avversarie». Ancora grande, infatti, era il numero dei giovani che la Chiesa non riusciva a raggiungere. «Le scuole pubbliche ritornano ad essere scuole laiche, quando non siano pervase da correnti comuniste», affermava l'arcivescovo<sup>107</sup>. Il Montini educatore, che sin dai tempi della FUCI aveva riservato energie umane e intellettuali alla comprensione dei giovani e della loro psicologia<sup>108</sup>, dimostrava ancora una volta di non volersi sottrarre al confronto con la realtà giovanile, questa volta milanese, colta nei luoghi in cui essa quotidianamente si formava. Ben si comprende, allora, la considerazione che l'arcivescovo riservò a Gioventù Studentesca, rinata nel '54 come iniziativa «specializzata» della GIAC per i giovani delle scuole superiori milanesi e che, in un momento di crisi

<sup>106</sup> A collocare GS dentro l'AC era anche Pignedoli, in occasione dell'Assemblea generale dell'AC ambrosiana svoltasi il 18 ottobre 1959 (S. Pignedoli, *Richiamo alla cattolicità*, «Direttive. Organo ufficiale della Presidenza Diocesana dell'A.C.», 1, 1960, pp. 7-9). La GS di Giussani ridava vita alla vecchia Gioventù Studentesca creata da Giancarlo Brasca subito dopo la seconda guerra mondiale la quale, inizialmente vivace, con Filippo Hazon e Sergio Zaninelli perse dinamismo e cessò le attività. Al proposito si veda Caimi, *L'associazionismo giovanile nell'esperienza di Montini arcivescovo*, cit., pp. 69-71, che fa riferimento al punto d'avvio di questa esperienza, vale a dire al dibattito sull'apostolato d'ambiente scaturito dalla preoccupazione di «specializzare» le proposte formative per renderle rispondenti alla reale situazione di vita di studenti e lavoratori, come era accaduto in Francia e in Belgio. GS aveva ripreso le attività con la settimana estiva di Gressoney del '54, cui aveva partecipato, come relatore, Giuseppe Lazzati. Nominato nel '53 vice-assistente della GF per le studentesse e poi divenuto assistente dell'Ufficio studenti della GIAC, don Giussani divenne responsabile dell'attività studentesca dell'AC milanese. Per la GS di don Giussani rimando a M. Camisasca, *Comunione e Liberazione. Le origini (1954-1968)*, Cinisello Balsamo, San Paolo, 2001, pp. 91 ss., e a A. Savorana, *Vita di don Giussani*, Milano, Rizzoli, 2013, pp. 127 ss. La ricostruzione più recente e documentata è quella di M. Busani, *Dall'organizzazione al movimento. Gioventù Studentesca dal dopoguerra alla crisi del 1965*, Tesi del Dottorato di ricerca in Storia e Letteratura dell'età moderna e contemporanea, Facoltà di Scienze della formazione, Università Cattolica del Sacro Cuore, Anno Accademico 2013-2014, in corso di stampa per i tipi di Studium.

<sup>107</sup> ADM, ASAM, 234, 509, lettera a Pignedoli del 5 luglio 1955. Per l'attenzione dell'arcivescovo alla situazione delle scuole pubbliche milanesi si veda G. Adornato, *L'episcopato Montini: catechesi e insegnamento religioso nella scuola*, «Notiziario» dell'Istituto Paolo VI, 54, 2007, pp. 63-108.

<sup>108</sup> Cfr. L. Maglio, G.B. Montini e la realtà giovanile milanese. *Linee di fondo per una pedagogia pastorale*, «Civiltà ambrosiana», vol. 1, n. 5, 1984, pp. 353-361. Su Montini educatore cfr. anche Caimi, *L'associazionismo giovanile nell'esperienza di Montini arcivescovo*, cit., e Montini-Paolo VI, *La pedagogia della coscienza cristiana*, cit.

dei settori giovanili dell'AC, perlomeno a Milano<sup>109</sup>, dimostrava non soltanto una notevole capacità di tenuta, ma di saper attrarre anche studenti che per la prima volta, attraverso GS, si accostavano al cristianesimo<sup>110</sup>.

La Gioventù Studentesca di don Giussani aveva avuto origine ed era cresciuta nell'alveo della GIAC; al tempo stesso, tuttavia, presentava peculiarità che, con la progressiva chiarificazione dell'impostazione pedagogica di Giussani, tendevano a distinguerla dal contesto associativo in cui era sorta. L'episcopato di Montini corrisponde appunto al decennio in cui avvenne questo non scontato percorso di precisazione, di cui i protagonisti – arcivescovo compreso – presero coscienza gradualmente. Nel 1964, in occasione del decennale di Gioventù Studentesca che coincideva con la penultima fase del Concilio, dentro GS era appunto maturata la percezione che si stava contribuendo alla costruzione di una pagina inedita della vita della Chiesa. L'«epoca nuova che i padri conciliari aprono – scriveva un giessino – sarà consegnata ai giovani che domani avranno il compito di “fare la Chiesa”». Proprio per questo la GIAC aveva «suscitato la Gioventù Studentesca, dimostrando così di intendere ‘la Chiesa come

<sup>109</sup> Lo raccontava all'arcivescovo nel '55 don Francesco Olgiati, che per lunghi decenni era stato uno dei punti di riferimento più importanti della Gioventù cattolica ambrosiana. Olgiati notava che, tra i sintomi di questa crisi, vi era la scarsità delle vocazioni. Le cause andavano ricercate, a suo dire, nel fatto che gli assistenti della GIAC nel secondo dopoguerra avevano dovuto occuparsi di una serie di emergenze politiche e sociali, impegnandosi a favore del partito, del sindacato e delle ACLI e finendo per mettere in secondo piano la formazione religiosa, morale e culturale che era necessaria per ravvivare la Gioventù cattolica (ADM, ASAM, 208N, 5, lettera manoscritta a Montini datata 2 febbraio 1955).

<sup>110</sup> Nelle carte di Montini si conserva, tra le prime tracce documentarie relative a GS, un lungo dattiloscritto intitolato «Relazione sulla situazione degli Studenti medi superiori delle scuole statali di Milano e sull'attività formativa della Gioventù Studentesca», che si riferisce all'anno scolastico 1954-1955 ed è stata redatta dagli «Assistenti ecclesiastici di G.S. Don Luigi Giussani e don Giampiero Maggiora» (ADM, ASAM, 104, 55; il dattiloscritto è firmato a mano da don Maggiora, che a quel tempo seguiva GS). Da questa relazione si evince che Gioventù Studentesca, definita «opera apostolica» dell'AC, era alimentata da uno spirito missionario declinato soprattutto nella forma della testimonianza e che tale predisposizione stava dando frutti positivi, perché il movimento era in fase di espansione. Non per niente Giussani e Maggiora chiedevano una sede dedicata a questo tipo di apostolato d'ambiente e distinta da quella dell'AC milanese (alla quale gli studenti che non provenivano dall'associazionismo cattolico si sarebbero accostati con difficoltà) e sostenevano che lo sviluppo di GS imponeva la presenza di almeno tre sacerdoti assistenti, disposti a fare vita in comune e a seguire il movimento. Il lavoro di GS nelle scuole prevedeva i raggi settimanali («la presenza organizzata, in ogni scuola, dei cattolici militanti», punto di partenza delle iniziative organizzate da GS nell'ambito delle scuole), l'assistenza religiosa (ritiri, esercizi spirituali), la predisposizione di giornali fatti da studenti e per studenti (si pensi a «Corriere 4 studentesco»), il Circolo cinematografico studentesco (seguito da don Giuseppe Gaffuri), i corsi di cultura (atti a integrare «la mancata formazione scolastica, specialmente sul piano religioso, filosofico, estetico e sociale», e a suscitare «l'interesse per lo studio personale attraverso la discussione libera e serena col Maestro ed un'adeguata indicazione bibliografica»), nonché il turismo, le vacanze e gli scambi di studenti cattolici di varie nazionalità. GS diceva di sentire la necessità di collegarsi con le persone e gli enti che erano interessati all'educazione e al mondo della scuola, dagli insegnanti di religione ai rami giovanili dell'AC e alla FUCI. Montini avrebbe assegnato a GS la sede di via Statuto 2.

storia' e non come museo»<sup>111</sup>. Storicizzare la vita della Chiesa, tuttavia, non era operazione così assodata nella temperie ecclesiale degli anni Cinquanta. E infatti la nascita di GS all'interno dell'associazionismo di AC non era in tutto e per tutto riconducibile alla tradizione diocesana. Che si trattasse di un «movimento d'ambiente» che presentava elementi rilevanti di novità era chiaro sin dall'inizio, elementi che, a buon diritto, collocavano GS tra quei «fermenti» che l'arcivescovo voleva monitorare. Nella testimonianza resa da don Giussani per il processo di canonizzazione di Paolo VI troviamo, condensati, alcuni motivi di vicinanza e, insieme, di perplessità dell'arcivescovo nei confronti di GS. Il sacerdote sosteneva che l'iniziativa pastorale di maggior rilievo dell'arcivescovo era stata la Missione del '57, tra i cui frutti vi era un rinnovato interesse tra i giovani, soprattutto studenti, con un incremento improvviso di Gioventù Studentesca.

La Missione – aggiungeva Giussani – portò alla luce fermenti nuovi, dettati da un desiderio di autenticità maggiore e dignità razionale della fede, capace perciò di essere singolare alternativa alla cultura laica. L'Arcivescovo decisamente sostenne le fatiche di tentativi nuovi, anche rischiosi. Mi chiamò dopo circa un anno di convivenza e mi obiettò la collusione di ragazzi e ragazze nelle varie iniziative, specialmente turistiche: “Di questo i prevosti di Milano si lamentano” e aggiunse che questi prevosti si lamentavano soprattutto del fatto che, polarizzando i giovani, li astraeva dalle parrocchie. Esposi le mie ragioni di fronte all'opposizione. Il Cardinale concluse esattamente così: “Non capisco bene le sue idee e i suoi metodi; ma ne vedo i frutti: vada avanti così[”]. Mi commuove ancora oggi il pensiero della sua lealtà di uomo e di guida della comunità messo di fronte a fatti buoni: li preferì di fronte a qualsiasi preconcetto<sup>112</sup>.

Nella testimonianza di Giussani emergono le inquietudini di Montini per quella «benedetta promiscuità»<sup>113</sup> che caratterizzava l'esperienza di GS sin dalle sue origini e che la differenziava dalla rigida divisione per sessi vigente nell'Azione Cattolica. Vi era poi la concorrenza che GS faceva alle parrocchie, le quali faticavano a rimanere un punto di riferimento per i ragazzi delle scuole superiori, proprio nel momento in cui Gioventù Studentesca lievitava grazie a un numero crescente di aderenti. In GS si notava che «normalmente la parrocchia non dispone[va] di un metodo sufficiente per contrastare l'influsso delle componenti sociali non cristiane dell'ambiente della scuola»; proprio per questo erano state create «comunità studentesche» che, collegate tra loro, avevano dato origine al movimento. Quest'ultimo, tuttavia, non era pensato in contrasto con la struttura parrocchiale, bensì come «strumento per salvare

<sup>111</sup> G. Contri, *Il decennio di Gioventù Studentesca a Cattolica*, «Diocesi di Milano», n. 11, 1964, p. 696. Per il rapporto fra GS e il Concilio si veda Bocci, «*La Chiesa in quanto tale*», cit., pp. 187-281.

<sup>112</sup> Congregatio de Causis Sanctorum, *Beatifications et canonizationis Servi Dei Pauli VI (Ioannis Baptistae Montini) Summi Pontificis (1897-1978), Positio super vita et virtutibus*, 2 voll.; Romae, 2002, vol. 2, p. 236.

<sup>113</sup> ADM, ASAM, 104, 55, lettera di Montini a Giussani del 16 giugno 1963.

i germi cristiani da essa trasmessa nei ragazzi» e per raggiungere i giovani che le parrocchie non riuscivano «più a impegnare in una riscoperta viva del cristianesimo». Dunque la prima GS si poneva come un «tratto provvisorio»<sup>114</sup>, perché riservato – come Montini sottolineava – agli studenti delle scuole superiori, un tratto, però, che i giessini entrati nelle università e nel mondo del lavoro faticavano ad abbandonare, ritenendo che la proposta di Gioventù Studentesca fosse in grado di sostenere una fede adulta e consapevole.

Insieme alle caratteristiche di GS che suscitavano l'apprensione dell'arcivescovo vi erano i motivi di prossimità, che spiegano il favore con cui Montini guardò al movimento guidato da Giussani, non facendosi trattenere da pregiudizi e ostilità che in diocesi non mancavano. A propiziare tale affinità vi era la predisposizione educativa nei confronti di una fascia di età che si collocava tra l'adolescenza e la maturità, tipicamente giessina ma ben presente anche in Montini; e vi era la capacità, di Montini e di Giussani, di cogliere non solo la «crisi» già diffusa nel mondo giovanile della seconda metà degli anni Cinquanta, ma anche «alcuni nuovi fermenti che, ben diretti» – come si legge in un documento di GS –, «potrebbero rappresentare un valore cristiano»<sup>115</sup>. In effetti l'arcivescovo seguiva con favore la crescita di Gioventù Studentesca<sup>116</sup>, che sapeva corrispondere alla sua ansia pastorale per i «lontani», ricercati da Montini non con atteggiamento da giudice o da censore, ma con l'animo di chi

<sup>114</sup> Contri, *Il decennio di Gioventù Studentesca*, cit., p. 696.

<sup>115</sup> La crisi per GS si declinava nei termini dello scetticismo, del disorientamento ideale, della «scarsa coscienza della realtà: poca comprensione per la miseria e la disoccupazione» e del «divertimento senza alcun criterio di scelta morale». I fermenti positivi da valorizzare erano invece il «desiderio di essere parte più attiva nella scuola, attraverso un contatto più vivo con gli insegnanti ed uno studio più personale», «un inizio d'interessamento più concreto alla scelta della professione, al lavoro, alla vita», «un desiderio di sincerità e la ricerca di qualche valore che possa trarre dallo scetticismo» (ADM, ASAM, 104, 55, «Relazione sulla situazione degli Studenti medi superiori», cit.). Questa diagnosi, avanzata dalla GS di Giussani alle origini della propria storia, è paragonabile, ad esempio, ad alcuni passaggi del discorso che Montini fece ai dirigenti della GIAC ambrosiana l'11 agosto 1955 (G.B. Montini, *Psicologia dei giovani cattolici di ieri e di oggi*, «Rivista diocesana milanese», n. 7, 1955, pp. 360-367).

<sup>116</sup> Nel '59 Giussani gli presentava «accorata domanda» perché a GS fosse accordato un altro sacerdote, che collaborasse a un «compito di apostolato divenuto ormai troppo impegnativo e vasto». La «corrispondenza degli studenti, copiosa al di là delle previsioni – scriveva –, se documenta la validità concreta del metodo, crea l'urgente problema di rendere stabile l'opera di assistenza, perché i giovani possano essere seguiti almeno là dove volentieri convergono». Nei ragni settimanali si raccoglievano infatti, in una quarantina di scuole, oltre 1.500 studenti fra i quindici e i diciannove anni. Giussani elencava gli impegni cui doveva far fronte: corsi dirigenti, raduni di studio, ritiri, esercizi, attività missionarie, opere caritative, cura dei gruppi di studenti orientati alla vita religiosa, e tutto ciò moltiplicato in diverse città della diocesi. GS fino a quel momento aveva potuto contare sulla collaborazione di qualche sacerdote, ma aveva bisogno della disponibilità di chi potesse seguirla sistematicamente, affiancandosi a don Giussani. Quest'ultimo, dunque, proponeva come «particolarmente adatto» don Giovanni Padovani, coadiutore in una parrocchia cittadina e già impegnato nella pastorale giovanile (ADM, ASAM, 104, 55, lettera del 19 maggio 1959). Montini venne incontro alla sua richiesta, destinando appunto Padovani a GS in modo che al movimento fossero assicurati continuità e incremento.

vuole aiutare l'interlocutore a trovare risposta a partire dalle proprie domande, senza chiedere un'accettazione passiva della fede<sup>117</sup>. Uno degli elementi di maggior convergenza tra l'arcivescovo e don Giussani si trovava appunto su questo terreno, e venne sviluppato da entrambi attraverso il recupero della dimensione del «senso religioso» come qualità strutturale della natura umana, una sottolineatura, questa, che accantonava la riluttanza per un tema ancora in odor di modernismo e che arricchiva l'attenzione alle premesse razionali della fede con la riscoperta della religiosità quale «proprietà originaria» dell'uomo<sup>118</sup>. La categoria di «senso religioso», come è noto, venne lanciata da Montini in diocesi con la lettera quaresimale del '57 e fu ripresa in tante occasioni da Giussani, come una delle ispirazioni centrali della sua visione educativa<sup>119</sup>. Non per niente i giessini si trovarono in prima fila nella Missione di Milano, finalizzata a risvegliare la sensibilità religiosa e la curiosità metafisica dei milanesi e dunque dedicata a «Dio Padre» e non ai doveri sacramentali e alla precettistica morale che erano al centro delle missioni tradizionali<sup>120</sup>. L'intervento compatto e numeroso di GS alla Missione, guidato da Giussani che, nel Comitato organizzativo, era responsabile per il mondo studentesco, fu rilevato con favore dall'arcivescovo. «La partecipazione – si legge negli Atti della Missione – fu numerosa

<sup>117</sup> Adornato, *Nuove piste di ricerca*, cit., p. 127. Per il rapporto fra tradizione cristiana e «forme nuove» necessarie ad esprimerla, ben presente nell'impostazione giessina e che implicava la messa «in crisi» della prima, «per poterne scoprire i valori ed abbandonare quello che valore non è, per poter scoprire la corrispondenza con ciò che si è e [...] liberarsi da ciò che poteva corrispondere alla situazione solo di altri tempi», si veda L. Giussani, *Appunti di metodo cristiano*, testo del 1964 ora in *Il cammino al vero è un'esperienza*, Torino, SEI, 1995, pp. 130-131.

<sup>118</sup> M. Borghesi, *Introduzione* a G.B. Montini, L. Giussani, *Sul senso religioso*, Milano, BUR, 2009, pp. 9 ss. Borghesi rileva parecchie consonanze tra la lettera *Sul senso religioso*, redatta da Montini nel '57, e il testo di Giussani *Il senso religioso*, pubblicato nel '58 a cura della presidenza diocesana della GIAC. Il testo di Giussani aveva preso spunto dalla pastorale di Montini che, a sua volta, aveva confermato alcuni stimoli presenti nel magistero teologico assunto da Giussani a Venegono, a cominciare da quello di Giovanni Colombo. Questo lavoro sarebbe stato poi rivisto e ampliato: importanti soprattutto le edizioni del '66 (una vera e propria rielaborazione) e del 1986 (l'espressione più compiuta di Giussani su questo argomento e uno dei testi più importanti per le riflessioni degli aderenti al movimento di Comunione e Liberazione, che ha sviluppato l'eredità di GS a partire dalla fine degli anni Sessanta).

<sup>119</sup> Quanto Giussani non dipese dalla «folgorante intuizione» di Montini che dedicò la lettera quaresimale del '57 al senso religioso, si chiede Ennio Apeciti? «Quanto l'arcivescovo non dipese dalle sollecitazioni di un suo prete? Nell'un caso o nell'altro, una cosa rimane certa: c'era allora, tra il vescovo e i suoi presbiteri, un ascolto attento, che suscitava e stimolava una reciproca attenzione, un affetto cordiale» (E. Apeciti, *L'insegnamento di Giovanni Battista Montini: il Concilio Vaticano II dalla cattedra di sant'Ambrogio a quella di san Pietro*, in M. Invernizzi, P. Martinucci (edd.), *Dal «centrismo» al Sessantotto*, Milano, Ares, 2007, pp. 402-403). Per il significato conferito da Montini al «senso religioso» si veda G. Moretto, «*Quel tanto di discussione filosofica, di cui l'anima modera ha bisogno, per ritornare religiosa*». *Giovanni Battista Montini e la pedagogia del senso religioso*, «Humanitas», vol. 52, nn. 5-6, 1997, pp. 738-768.

<sup>120</sup> Cfr. G. Adornato, *La Chiesa e i lontani: un bilancio a trent'anni dal grande esperimento della Missione di Milano del 1957*, «Studi e fonti di storia lombarda. Quaderni milanesi», n. 14, 1987, pp. 88-97, e Rumi, *La Missione di Milano: oltre i confini della tradizione*, cit., p. 169.



(8000) studenti e l'uditorio fu molto esigente. I risultati positivi sono in gran parte dovuti alla continua assistenza religiosa specializzata»<sup>121</sup>. Non mancava, insomma, una sorta di circolazione reciproca tra il magistero di Montini e l'impostazione pedagogica infusa da Giussani in GS, che favoriva la stimolazione vicendevole. La Missione aveva messo in evidenza i bisogni pastorali della città, percepibili soprattutto a livello giovanile. Al contempo, lo straordinario sviluppo di GS, particolarmente apprezzata da Montini proprio in quella occasione, contribuiva a sollecitare l'arcivescovo sul tema dei lontani<sup>122</sup>.

La volontà di superare il «perbenismo religioso» che nascondeva, dietro l'apparenza di numeri ancora relativamente grandi, una distanza crescente tra l'associazionismo cattolico teso a curare la formazione interna, da una parte, e la maggioranza della popolazione della diocesi, dall'altra<sup>123</sup>, era dunque elemento niente affatto secondario nella consonanza che univa l'arcivescovo all'assistente di GS. Arrivare alle coscienze era l'imperativo di entrambi, così come entrambi credevano che a vincere quella lontananza servisse non una fede formalistica, ridotta a consuetudine e a obbedienza ad istanze soprattutto morali, bensì un cristianesimo vissuto in pienezza e in profondità, capace di valorizzare la vita intera<sup>124</sup>. Probabilmente è questo uno degli elementi più rilevanti della vicinanza di Montini a Gioventù Studentesca, proprio nel momento in cui l'arcivescovo si stava interrogando sullo stato di salute dell'Azione Cattolica, preoccupato per la «stanchezza» e la «minor vivacità spirituale» che si poteva percepire tra le sue file<sup>125</sup>. «Abbiamo bisogno di un cristianesimo vero, adeguato al tempo moderno», aveva detto Montini entrando in diocesi<sup>126</sup>. Tale istanza ben si incrociava con l'esperienza giessina, che faceva perno sulla convinzione di Giussani circa la necessità che la comunicazione della buona novella implicasse un'intuizione pedagogica rinnovata, capace di presentarla «in termini il più adatti possibile alla mentalità e ai bisogni del tempo»<sup>127</sup>. Far conoscere Gesù

<sup>121</sup> *La Missione di Milano 1957. Atti e documenti*, a cura dell'Ufficio studi dell'Arcivescovado di Milano, 1959, p. 450.

<sup>122</sup> Adornato, *Nuove piste di ricerca*, cit., p. 125.

<sup>123</sup> Apeciti, *L'insegnamento di Giovanni Battista Montini*, cit., p. 401.

<sup>124</sup> L. Giussani, *Risposte cristiane ai problemi dei giovani*, opuscolo preparato per la catechesi nell'anno sociale 1955-1956, pubblicato nel '55 a cura della GIAC e ristampato nel 1992 nel Quaderno n. 16 di «Litterae Communionis» (supplemento alla rivista di CL).

<sup>125</sup> Le parole sono di Luigi Olgiati, assistente diocesano della GIAC, che faceva eco a una riflessione dell'arcivescovo mentre notava che l'AC presentava una preoccupante «mancanza di ardore apostolico», «una certa mediocrità ed un certo assopimento» (ADM, ASAM, 102, 31, appunti dattiloscritti mandati a Montini con lettera del 21 luglio 1959). Nelle carte di Montini sono diversi i rimandi alle preoccupazioni di Montini per l'Azione Cattolica, sebbene lo stesso arcivescovo, come è noto, non perdesse occasione per rilevarne la centralità. Al 1962 risale una lettera «confidenziale» indirizzata al sostituto Dell'Acqua in cui Montini esprimeva forti critiche nei confronti della direzione nazionale dell'AC, pur aggiungendo che a risolverne la «crisi» non sarebbero bastate nuove nomine (ADM, ASAM, 226, 128, lettera del 27 febbraio 1962).

<sup>126</sup> Seveso, *Cristianesimo e società civile*, cit., pp. 39-41.

<sup>127</sup> Non indulgendo in un'astratta apologia del cristianesimo, Giussani rifletteva sullo

Cristo: questo il mandato che Montini affidava agli assistenti della GIAC, con l'augurio che i giovani da loro raggiunti fossero «grati perché – diceva – voi li avete avvicinati a questo contatto fulminante con la presenza di Cristo, [...] voi siete stati coloro che li avete fatti incontrare con questa fortuna»<sup>128</sup>. Molti giessini testimoniavano, appunto, che era quel che a loro era successo incontrando Gioventù Studentesca.

La «paterna sollecitudine»<sup>129</sup> con cui Montini seguiva GS è dunque ben spiegabile ed è percepibile nelle fonti a disposizione. «La seguo con grande interesse, con affezione grande, pregando molto, trepidando un poco, fiducioso sempre ch'Ella, ed i Suoi collaboratori e amici, sapranno essere guide brave e sicure della schiera carissima e crescente dei nostri Studenti», scriveva l'arcivescovo a Giussani in occasione di un convegno studentesco organizzato da GS nel '60, con il concorso di duemila ragazzi<sup>130</sup>. Fiducia e trepidazione nei confronti dell'esperimento erano, appunto, i due sentimenti che si incrociavano in Montini, due stati d'animo compresenti, che riflettevano sia l'ammirazione per la tensione missionaria e per il coraggio con cui i giessini manifestavano l'appartenenza religiosa in un ambiente come quello della scuola che era contagiato dal laicismo, sia il timore che i tratti di novità potessero inficiare la prospettiva del movimento<sup>131</sup>. La cura di Montini per GS è ben documentata: fra tutti i «fermenti» seguiti dall'arcivescovo, si può dire che quello giessino – stando alla quantità e alla qualità della documentazione – l'ha davvero sollecitato, non ultimo per il fatto che ha interessato tantissimi giovani, a cominciare da coloro che non frequentavano né le parrocchie né le associazioni cattoliche e che GS riusciva non solo ad avvicinare, ma a coinvolgere nell'esperienza di fede.

Tra le attività di GS più apprezzate da Montini vi era senz'altro l'apostolato nella Bassa milanese, iniziato nel '58 e pensato per persone che generalmente erano distanti dal cristianesimo e dalla vita della Chiesa, le cui condizioni di miseria e di degrado erano ben note all'arcivescovo anche grazie ai sacerdoti della Fontana. In Bassa i giessini, con la partecipazione di compagni a volte non cristiani, ogni domenica svolgevano un lavoro di animazione incentrato sul catechismo, che veniva spigato ai bambini non a partire dagli «schemi tradizionali, ma piuttosto [da] alcune semplici e fondamentali idee del

scetticismo dei ragazzi che incontrava. Gli premeva avvalorare il «desiderio» profondo implicito in ogni «interesse umano», da lui letto come attrattiva con la quale «Dio ci chiama a sé» (L. Giussani, *Risposte cristiane ai problemi dei giovani*).

<sup>128</sup> Montini, *Dare ai giovani un'autentica sensibilità religiosa*, cit., p. 503. Per la pastorale giovanile di Montini si veda Caimi, *L'associazionismo giovanile nell'esperienza di Montini arcivescovo*, cit., pp. 45 ss., che parla di «meditata e prudente innovazione».

<sup>129</sup> ADM, ASAM, 104, 55, lettera di Montini a Giussani del 27 ottobre 1960.

<sup>130</sup> ADM, ASAM, 104, 56, lettera del 2 marzo 1960. Il convegno era dedicato al tema «Vivere le dimensioni del mondo» e aveva visto l'intervento, tra gli altri, di Giorgio La Pira.

<sup>131</sup> Adornato parla di una «linea che contempera compiacimento e vigilanza». Sottolinea inoltre la «paternità» di Montini verso Giussani, il quale la ricambiava «con un profondo senso di rispetto della sua autorità» (Adornato, *Parte terza*, cit., p. 285).

Cristianesimo: Dio, Gesù Cristo, la Chiesa»<sup>132</sup>. Inoltre si rivolgevano ai giovani e tentavano di intercettare l'interesse degli adulti, mettendosi a disposizione, dove esistevano, degli oratori organizzati dai parroci. Si trattava, nelle intenzioni di GS, di un'iniziativa finalizzata soprattutto all'educazione alla carità di chi se ne faceva carico, frutto di un «incontro ben più vasto ed esauriente, quello con la comunità della Chiesa e con la Sua proposta di salvezza» e dunque strumento per rafforzare la «coscienza ecclesiale» di chi vi prendeva parte<sup>133</sup>.

È un lavoro magnifico – commentava Montini –: l'educazione alla carità, la testimonianza personale e concreta d'un cristianesimo vissuto e innestato nella realtà sociale che più gli è vicina per il bisogno e la ricettività, lontana per dimenticanza e sovente per avversione. È fenomeno che rivela capacità operative della gioventù di oggi; è esperimento che apre speranze sia per la nostra pedagogia al sacrificio e all'amore, sia per il ricupero alla speranza e al costume cristiano di popolazioni, a cui non è ancora stato benefico lo sviluppo civile della società moderna<sup>134</sup>.

Sono molte, insomma, le attestazioni di stima di Montini nei confronti di GS, che l'arcivescovo aveva affidato alla cura di Pignedoli e soprattutto di don Enrico Manfredini, nominato nel '58 assistente generale dell'AC milanese e legato, sin dai tempi del seminario, a don Giussani. Manfredini fu anzi il tramite fondamentale fra il sacerdote e la Curia, nonché «il supremo difensore e interprete delle sue istanze di fronte alle critiche e alle accuse di tanta parte del mondo cattolico milanese»<sup>135</sup>.

È a partire dal 1960, come testimoniano le carte, che qualche nube sembra offuscare l'orizzonte dei rapporti tra l'arcivescovo e Gioventù Studentesca. All'origine di tale increspatura vi sono le critiche e le sollecitazioni di chi rappresentava settori dell'associazionismo cattolico che si sentivano minacciati dalla diffusione di GS e che faticavano a capirne l'impostazione educativa. «Incoraggiare – e assistere l'opera di D. Giussani», recita la prima voce di un elenco di punti stilato dalla mano di Montini in previsione di un incontro con

<sup>132</sup> Dattiloscritto intitolato «Relazione sull'attività dei gruppi giovanili nel Basso Milanese», mandato a Montini da Enrico Manfredini, delegato arcivescovile per l'AC, nel maggio 1961 (ADM, ASAM, 104, 55).

<sup>133</sup> La citazione viene dalla lunga relazione dattiloscritta mandata da Giussani e Padovani a Montini, con lettera del 1° giugno 1963 (ADM, ASAM, 166N, 1806). Gli studenti coinvolti erano più di 1.500 ed erano sostenuti da un centinaio di universitari legati a GS e da alcuni lavoratori. I luoghi di tale apostolato nel 1963 erano quarantasei. La Curia sosteneva economicamente l'impegno di GS in Bassa. Nel '63 l'arcivescovo, poco prima di entrare in conclave, inaugurò la mostra fotografica di GS sulla Bassa, realizzata da Elio Ciol e organizzata all'Ambrosianum (Savorana, *Vita di don Giussani*, cit., pp. 246-247). Il significato attribuito all'esperienza di GS nelle periferie, non soltanto milanesi, è segnalato nel volume di L. Giussani *Il senso della caritativa*, edito a Milano da GS nel 1961, che è appunto il frutto del lavoro dei giessini impegnati in Bassa.

<sup>134</sup> ADM, ASAM, 104, 55, lettera del 18 maggio 1960 a Manfredini. L'apprezzamento dell'arcivescovo sfociava, tra l'altro, nei ripetuti incontri con i giessini che avevano aderito all'iniziativa della Bassa, come quello del 1° maggio 1961.

<sup>135</sup> Camisasca, *Comunione e Liberazione. Le origini (1954-1968)*, cit., p. 250.

Giussani e Padovani. Segue però un secondo punto: «Non deve fare opera contro l’Azione Cattolica e la Fuci, in particolare»<sup>136</sup>. Evidentemente era a questo livello che cominciava ad esserci qualche problema. Altre, tuttavia, le questioni che interrogavano Montini: voleva infatti sapere se Giussani «sta[va] preparando un invio di Signorine in Brasile per fare le missionarie. Se sì – annotava –, bisogna vedere bene ogni cosa: l’impresa è di tale responsabilità che non deve essere permessa senza previo esame d’ogni circostanza»<sup>137</sup>. Il riferimento, come è noto, è al progetto che proprio allora era allo studio di Giussani e che prevedeva di inviare alcuni giovani in missione, complici monsignor Aristide Pirovano, missionario del PIME e vescovo di Macapà, e Marcello Candia, che stava progettando di lasciare la propria impresa per divenire, a sua volta, missionario in Brasile<sup>138</sup>. Nel bilancio steso dall’arcivescovo nella primavera del ’60 compariva inoltre il tema delle relazioni tra Giussani e gli altri insegnanti di religione delle scuole milanesi: nella loro assistenza extra-scolastica agli studenti tali sacerdoti – scriveva Montini – non dipendevano da Giussani: potevano «con lui accordarsi, ma d[ovevano] essere lasciati liberi»<sup>139</sup>. Quest’ultima osservazione voleva rispondere, probabilmente, all’alternativa, se non alla contrapposizione, che in alcune scuole milanesi si era creata tra gli «incaricati» di GS e gli insegnanti di religione che li affiancavano nella cura dei ragazzi. Nel tentativo di far fronte al problema era stata creata una Consulta, presieduta da Pignedoli, che diede avvio ad incontri periodici tra i docenti di religione<sup>140</sup>.

Man mano che il tempo passava, tuttavia, aumentavano le pressioni di chi metteva in discussione GS e si appellava all’arcivescovo perché facesse chiarezza. È il caso, ad esempio, del vescovo di Crema Placido Cambiaghi,

<sup>136</sup> ADM, ASAM, 104, 55, appunto manoscritto intitolato «Circa la G.S.» e datato 6 maggio 1960. Sull’appunto è annotato: «Parlato con D. Giussani e D. Padovani 16.V.60». Anche Adornato colloca in questa fase la presa di distanza tra la FUCI e GS (*Parte terza*, cit., p. 285).

<sup>137</sup> ADM, ASAM, 104, 55, appunto manoscritto «Circa la G.S.», cit.

<sup>138</sup> Camisasca, *Comunione e Liberazione. Le origini (1954-1968)*, cit., pp. 194-204. Del gennaio precedente era il convegno «Vivere le dimensioni del mondo», finalizzato a «proporre agli studenti milanesi un’apertura cosciente e cordiale ai valori di ogni cultura e ai bisogni dell’umanità» (*ibid.*, pp. 165-166). Nel 1960 Giussani visitò l’Amazzonia, invitato da Pirovano che aveva partecipato al convegno. Il progetto, tuttavia, iniziò a concretizzarsi l’anno successivo con l’invio di alcuni giessini a Belo Horizonte, per partecipare al convegno dell’Unione degli studenti cattolici brasiliani. A partire dal ’62 i rapporti si intensificarono, coinvolgendo più stabilmente alcuni universitari legati a GS nell’iniziativa missionaria in Brasile. Si veda anche Savorana, *Vita di don Giussani*, cit., pp. 275-288. Nelle carte di Montini si trova un promemoria mandato da Manfredini a Macchi il 15 dicembre 1961 e pensato per tenere al corrente l’arcivescovo. In esso si legge che il progetto del Brasile nasce da una «preoccupazione educativa», perché un’educazione non sarebbe pienamente cristiana «se la cattolicità della Chiesa non diventa fattore costitutivo della mentalità stessa del giovane. D’altra parte – si notava – è solo attraverso l’impegno con dei fatti che il giovane viene educato più facilmente e più precisamente»: ADM, ASAM, 103, 37, dattiloscritto intitolato «Promemoria sul progetto di interscambio studenti Milano - Belo Horizonte (Brasile)».

<sup>139</sup> ADM, ASAM, 104, 55, appunto intitolato «Circa la G.S.», cit.

<sup>140</sup> Lo spiega Busani, *Dall’organizzazione al movimento*, cit. Della Consulta Giussani era il segretario. Gli incontri avevano cadenza mensile.

che raccoglieva «impressioni» suscitate in un suo collaboratore dai contatti con i giessini della città<sup>141</sup>, oppure di don Giovanni Barbareschi, assistente della FUCI, che denunciava una presunta «emancip[azione] dalla famiglia» dei giessini e un ipotizzato «distacco dalla Chiesa»<sup>142</sup>; ancora, è il caso di qualche genitore che, preoccupato, disapprovava il coinvolgimento delle figlie nelle attività della Bassa<sup>143</sup>. Montini probabilmente non sottovalutava tali insistenze; chiedeva infatti consiglio ai suoi collaboratori che, come Giovanni Colombo, ora vescovo ausiliare al posto di Pignedoli, suggerivano di «inalveare» le esuberanze giovanili e di levigare il «gergo» giessino, proponendo però, al contempo, di accordare «fiducia» a GS, che era da «incoraggiare e da aiutare»<sup>144</sup>. «A questo punto», si notava in un appunto dattiloscritto che rispondeva alle critiche di Cambiaghi e che era stato preparato da persona che ben conosceva l'assistente di GS, «mi sembra che Don Giussani, sotto la guida (per es.) di Mons. Giovanni Colombo o di Mons. Carlo Colombo dovrebbe fissare delle linee concrete per la G.S., eliminando tutte le esuberanze che possono nuocere. Dopo un certo periodo di rodaggio mi pare si possa fissare qualcosa di stabile, anche se non ancora definitivo»<sup>145</sup>. In effetti proprio in quel momento, in parallelo allo sviluppo di GS e alla creazione di una struttura organizzativa del movimento che raccoglieva gli «incaricati» e

<sup>141</sup> La «riservata personale» di Cambiaghi è datata 2 gennaio 1961 e trasmette le impressioni di un assistente diocesano della GIAC, don Zeno Bettoni (ADM, ASAM, 104, 55). In questa missiva sono presenti molti degli addebiti che, da allora in poi, sono stati fatti a GS e alla nascente CL, ripresentati, spesso senza mediazioni interpretative, in quadri di sintesi e in giudizi sommari proposti da opuscoli e da volumi pubblicati a partire dagli anni Settanta. Tra le critiche sollevate da Cambiaghi, vi erano l'insistenza di GS sull'«esperienza» dell'incontro con Cristo (effettivamente centrale nel movimento, dove si presentava il cristianesimo come un fatto, un evento legato all'Incarnazione di cui il credente doveva poter fare esperienza) e una presunta mancanza di «sostanza teologica», che poteva sfociare nel soggettivismo e nell'esistenzialismo; e poi il «narcisismo» («pare che chi parla stia ad ascoltarsi»), una «specie di messianismo» e lo stretto legame personale con Giussani. Si parlava anche di «semifocalarismo». Utilizza questa documentazione anche Marta Busani in *Dall'organizzazione al movimento*, cit., cui si rimanda per la contestualizzazione di tali critiche all'interno del clima cattolico milanese.

<sup>142</sup> ADM, ASAM, 104, 55, appunto manoscritto che probabilmente fa riferimento a un incontro con Barbareschi del 6 febbraio 1961.

<sup>143</sup> Si veda la lettera firmata da «un gruppo di mamme» e datata 1° settembre 1961 (ADM, ASAM, 104, 55).

<sup>144</sup> ADM, ASAM, 104, 55, appunto dattiloscritto intitolato «Impressioni su G.S.», su cui, a penna, è apposta la data 8 febbraio 1961 e la sigla «GL» (Giovanni Colombo). In un altro dattiloscritto, conservato nella medesima collocazione archivistica ma non datato e non firmato (forse attribuibile a Manfredini), si trova la risposta agli addebiti avanzati da Cambiaghi: anzitutto Giussani, che l'estensore dell'appunto conosceva personalmente, sembrava esente dalle critiche avanzate dal vescovo di Crema. La «G.S. – si notava – è ancora in fase di fermentazione tumultuosa, e questa fermentazione tumultuosa spiega, forse, esuberanze ed intemperanze, soprattutto di linguaggio, forse anche di qualche atteggiamento [...]. Don Giussani ha un po' un atteggiamento messianico, sa affascinare». Proprio per questo i preti assorbiti da compiti diversi dalla pastorale giovanile a volte faticavano a capirlo.

<sup>145</sup> *Ibid.*

i primi ex-giessini<sup>146</sup>, Giussani cominciava a precisare le basi metodologiche della sua proposta educativa<sup>147</sup>. Lo suggeriva lo stesso Manfredini, il quale osservava che il sacerdote conosceva «bene la teologia ed [aveva] una vivissima percezione della sensibilità giovanile: [avrebbe] pot[uto] produrre cose notevoli, utili anche ad altri». Sarebbe stato opportuno – si ribadiva – «raccolgere attorno a G.S. l'attenzione e la collaborazione degli insegnanti di religione». Quanto al problema dei giovani legati a GS che si iscrivevano all'università, si ipotizzava di costituire, sotto la direzione del delegato arcivescovile e del presidente diocesano di AC, «l'esperimento unitario dei gruppi di facoltà», che avrebbe raccolto gli studenti cattolici presenti negli atenei milanesi<sup>148</sup> articolandosi in tante «comunità» quante erano le facoltà. Lo scopo – scriveva Manfredini – era «la testimonianza cristiana nell'ambiente universitario»<sup>149</sup>.

<sup>146</sup> ADM, ASAM, 104, 55, lettera di Giussani e Padovani a Montini del 18 aprile 1961. Nel '61 gli «incaricati», «struttura portante del Movimento», erano circa 160. Per lo sviluppo di GS e la maturazione della sua impostazione pedagogica negli anni che vanno dal '58 al '61 si veda Busani, *Dall'organizzazione al movimento*, cit.

<sup>147</sup> Si pensi ai tre libretti firmati da Giussani *Gioventù Studentesca: Riflessioni sopra un'esperienza* (Milano, Gioventù Studentesca, 1959), *Tracce d'esperienza cristiana* (Milano, Edizioni della Presidenza diocesana della GIAC e di GS, 1960) e *Appunti di metodo cristiano* (Milano, Gioventù Studentesca, 1964): frutto delle «scuole GS» di quegli anni, hanno avuto numerose edizioni.

<sup>148</sup> ADM, ASAM, 166N, 1805, dattiloscritto intitolato «Pro memoria su: Gioventù Studentesca», datato 7 ottobre 1961, che fa conoscere le osservazioni del delegato arcivescovile di AC e di sacerdoti e laici da lui consultati. Ci si augurava un dialogo costante tra i professori di religione e gli assistenti di GS: questi ultimi dovevano informare i primi del loro metodo e delle linee programmatiche del movimento, chiedendo suggerimenti e collaborazioni. Pensando ai «gruppi di facoltà», si scriveva che sarebbe stato opportuno raccomandare a GS «piena, costante e docile collaborazione, anche se insorgessero, come è prevedibile, delle difficoltà. A dire il vero, G.S. non ha mai mancato di deferenza né di docilità verso la Presidenza Diocesana – si aggiungeva –: ma la raccomandazione può essere utile soprattutto in vista della difficoltà del tentativo che ci si propone di attuare». Altre le «linee di lavoro» cui GS avrebbe dovuto uniformarsi: agli incaricati avrebbe dovuto «essere impartita una formazione teologica sistematica», sia pure «nelle forme e nei modi che saranno giudicati più adatti al Movimento»; don Giussani doveva «dare ai giovani un testo (se ce ne fosse uno che s'intoni al suo metodo) o delle dispense (scritte da lui, o raccolte dalle sue lezioni, come ha fatto per altri opuscoli che circolano in G.S.)»; per le ragazze dovevano essere stabilite alcune «soste» spirituali distinte da quelle dei ragazzi; occorreva inoltre «qualificare, sul piano catechistico e apostolico, i giovani e le signorine che [andavano] ogni domenica nella Bassa».

<sup>149</sup> ADM, ASAM, 166N, 1805, dattiloscritto intitolato «Schema di accordo sui “Gruppi di Facoltà”», che Manfredini inviava a Montini con lettera del 21 novembre 1961, nella quale scriveva di averlo redatto in base alle «osservazioni di tutti gli interessati, facendo tesoro, specialmente, delle osservazioni espresse» da mons. Costa, assistente nazionale della FUCI, durante un'udienza con il cardinale. Nello schema si prevedeva che i gruppi di facoltà fossero guidati da un «nucleo» di persone impegnate, «unite dalla preoccupazione di vivere il mistero della Chiesa, soprattutto nella partecipazione alla liturgia e nello sforzo di conoscere e comunicare la parola di Dio». Ogni gruppo avrebbe dovuto avere momenti di preghiera comuni, riunioni periodiche finalizzate a riflettere sull'esperienza universitaria, attività caritative e attività culturali. Erano previsti sacerdoti assistenti per ogni gruppo e un Centro incaricato di elaborarne i programmi annuali, composto dalla FUCI, «a titolo particolare», e poi da GIAC, GF, Congregazioni mariane e GS, quest'ultima «a motivo degli Universitari presenti in essa come “incaricati” e per quelle intese sul piano del

Questa prospettiva, tuttavia, aveva già suscitato le apprensioni dell'assistente nazionale della FUCI, monsignor Franco Costa, che si appellava a Montini perché arginasse GS<sup>150</sup>.

Di fronte a un contesto ecclesiale in cui iniziavano a comparire incomprensioni e antagonismi, Giussani e Padovani, vedendo crescere esponenzialmente le adesioni a GS e registrando la «ricchezza di vita cristiana» testimoniata da molti ragazzi, chiedevano la «comprensione» dell'arcivescovo, convinti che la fiducia del pastore della diocesi fosse indispensabile al loro impegno e che le deficienze osservabili nei comportamenti dei giessini si dovessero non all'ispirazione pedagogica del movimento, ma alla scarsità del numero di sacerdoti che fornivano adeguata assistenza<sup>151</sup>. «Non si può ormai arrestare lo sviluppo del movimento senza minacciare la stessa sua natura – notavano –: o lo si abbandona [del]

metodo che agevolino l'inserimento» nei gruppi di facoltà delle matricole provenienti da GS. La FUCI avrebbe avuto una «posizione prominente, a causa delle sue specifiche finalità»; le altre associazioni sarebbero state «corresponsabili» nella direzione dei gruppi. La presidenza del Centro sarebbe stata affidata, ad *experimentum*, alla Presidenza diocesana di AC. In una lettera indirizzata a don Macchi Giussani chiariva la posizione sua e di Padovani: concordavano sul «tentativo», che avrebbe potuto «far trovare alla Fuci stessa nuova vitalità ed apertura». Facevano però notare che gli «incaricati» di GS erano «estremamente impegnati nel loro tempo libero. Perciò per quanto riguarda la partecipazione a singoli raduni in campo universitario, faranno quello che possono, – come del resto noi stessi diciamo ai responsabili di associazioni di A.C. o scouts» (ADM, ASAM, 166N, 1805, 30 novembre 1961). Sulla nascita e gli sviluppi dei gruppi di facoltà rimando alla ricostruzione di Busani, *Dall'organizzazione al movimento*, cit.

<sup>150</sup> Adornato, *Parte terza*, cit., p. 285. Si veda la lettera di Costa del 22 luglio 1960, indirizzata a Montini: l'assistente nazionale della FUCI scriveva che la Federazione avrebbe potuto accettare la collaborazione di altri, ma non riteneva giusto che l'AC, dopo averle affidato l'apostolato universitario, «desse vita ad altri movimenti universitari cattolici» o ne limitasse i compiti, chiamandola a collaborare a «iniziative che sembrano naturalmente sue». Metodi che erano validi in altri ambienti per Costa erano inadatti alle università, dove la FUCI aveva l'esclusiva da sessantacinque anni, con risultati che, per l'assistente, erano stati rilevanti (ADM, ASAM, 104, 54).

<sup>151</sup> ADM, ASAM, 166N, 1805, lettera manoscritta (con calligrafia di Giussani) del 17 dicembre 1961, con la quale si inviava a Montini un corposo resoconto annuale sull'attività di GS. «Solo nella Sua comprensione la nostra azione può vivere – scrivevano i due sacerdoti –; solo nella Sua fiducia noi ci sentiamo liberi; della Sua benevolenza abbiamo più bisogno che del pane quotidiano». Nel resoconto si osservava che, mentre i rapporti di GS con la Presidenza diocesana e con la GIAC erano di cordialità e di sintonia, con la Gioventù Femminile mancava una vera e propria collaborazione. Le differenze tra la FUCI e GS sembravano comunque di sostanza. L'impostazione di Barbareschi, infatti, per Giussani e Padovani non era capace «dell'incidenza necessaria per rinnovare una situazione così depressa, e neanche capace di richiamo adeguato per i più impegnati». Il «metodo» di GS si ispirava a due direttive fondamentali: «dal punto di vista del mistero cristiano, solo la presenza della comunità vissuta e quindi unitariamente espressa è richiamo e sorgente efficace di conversione in un ambiente»; «dal punto di vista pedagogico, solo l'impegno di fatto, fedele e integrale, può generare convinzioni e giudizi precisi come spirito cristiano». Dal momento che la vitalità di GS era innegabile ed era provata dalla sua diffusione in tante città italiane, per i due sacerdoti la collaborazione con altri sarebbe stata feconda e duratura se fosse nata non da una convergenza estrinseca e occasionale, ma dalla condivisione del metodo. Quanto al numero ristretto di sacerdoti che potevano fornire assistenza a GS, si chiedeva che le nomine degli insegnanti di religione tenessero conto della loro disponibilità a seguire i gruppi di GS.

tutto o ci si deve rassegnare a vederlo crescere»<sup>152</sup>. L'arcivescovo teneva conto di queste osservazioni, rafforzate dalle buone impressioni che GS suscitava in vescovi e sacerdoti che operavo in diversi contesti italiani e che, seguendo i giovani affidati alle loro cure, erano entrati in contatto con la GS milanese<sup>153</sup>. Non per niente Montini avrebbe fatto fronte alle insistenze di Costa, cui era legato dalla sensibilità fucina, con il richiamo al «principio di libertà così caro alla FUCI e che lui stesso aveva difeso ai tempi della persecuzione fascista»<sup>154</sup>.

Il problema del coordinamento delle associazioni e degli enti che, in diocesi, si occupavano dell'apostolato laicale, in special modo tra i giovani, rimaneva però al centro delle preoccupazioni dell'arcivescovo, che continuava ad interrogarsi, del pari, sulle esperienze aggregative che non rientravano in tutto e per tutto nei canoni tradizionali. Nel febbraio del '62 Montini istituiva dunque la Consulta diocesana dell'apostolato dei laici, incaricandola di favorire l'unità e la disciplinata collaborazione tra le diverse organizzazioni laicali<sup>155</sup>. Tra gli esperimenti non riconducibili ai quadri pastorali tradizionali vi era ormai anche un'altra iniziativa legata a Gioventù Studentesca, che si stava diffondendo negli uffici, nelle aziende e in alcuni quartieri periferici, attorno alle parrocchie, e che però sembrava porsi come vero e proprio «movimento». Si trattava di Gioventù Lavoratrice, nota con la sigla GL, che coinvolgeva numerosi giovani che avevano incontrato GS negli istituti tecnici e che, diplomati, erano entrati nel mondo del lavoro, collegati al territorio più stabilmente anche perché impegnati nella costruzione di nuove famiglie. Ad alimentare GL, spesso, vi erano fratelli e amici dei giessini che frequentavano gli oratori milanesi e che avevano conosciuto GS attraverso qualche sacerdote che si occupava dei giovani. GL era nata nel '61 come strumento missionario promosso dalla Presidenza della GIAC, che voleva riorganizzare il proprio Ufficio lavoratori, da tempo inattivo, e coordinare alcuni tentativi precedenti, dando loro impostazione unitaria<sup>156</sup>. «Ci appare sempre più urgente una presenza cattolica nell'ambiente

<sup>152</sup> *Ibid.*

<sup>153</sup> Nella corrispondenza di Montini sono conservate parecchie attestazioni di stima, provenienti appunto da vescovi e sacerdoti (come anche da genitori) che avevano conosciuto GS attraverso i ragazzi e la partecipazione ad iniziative di ritiro o di carità organizzate dal movimento.

<sup>154</sup> Adornato, *Parte terza*, cit., p. 285. Si veda pure Camisasca, *Comunione e Liberazione*, cit., p. 248. La notizia è presente anche nella testimonianza resa da Giussani per la canonizzazione di Paolo VI: durante un incontro cui avevano partecipato Giovanni Colombo e Manfredini, che aveva dato modo a Costa di chiedere la soppressione di GS, «l'Arcivescovo concluse: "Se voi della FUCI reclamate sempre la libertà per i vostri tentativi, perché non lasciare la stessa libertà a Gioventù Studentesca?". Così salvò tutto il futuro di questo organismo» (*Positio super vita et virtutibus*, cit., pp. 236-237).

<sup>155</sup> Adornato, *Parte terza*, cit., p. 286.

<sup>156</sup> Per GL rimando a Camisasca, *Comunione e Liberazione*, cit., pp. 235-244, e a Busani, *Dall'organizzazione al movimento*, cit., che ricostruisce la nascita di Gioventù Lavoratrice all'interno dell'associazionismo giovanile ambrosiano e nazionale. GL, la cui Presidenza aveva sede in via Sant'Antonio 5, vale a dire nella sede dell'AC diocesana, fu affidata dalla GIAC ad Elio Sermoneta, un giovane legato alla parrocchia dei Santi Nereo e Achilleo, dove operava don Vanni



dei giovani lavoratori», scriveva all'arcivescovo Alberto Antoniazzi, presidente diocesano della GIAC. «Stiamo perciò radunando qualche sforzo frammentario – tentato qua e là da giovani di A.C. – in un movimento organico, che dovrebbe rappresentare l'azione missionaria' della G.I.A.C.». GL si rivolgeva a lavoratori non iscritti ad associazioni cattoliche, vale a dire più del 90% dei giovani lavoratori, proponendo loro «una concezione cristiana della vita, non la soluzione di particolari problemi (sociali, sindacali, assistenziali), per i quali rimanda[va] invece ai movimenti competenti». L'impostazione di GL, dunque, era esaminata insieme alla Presidenza diocesana di AC, in contatto con le ACLI e con l'Ufficio di pastorale sociale<sup>157</sup>.

E tuttavia, che cosa fosse o dovesse essere Gioventù Lavoratrice e come dovesse operare, sul doppio binario delle parrocchie e del mondo del lavoro, era argomento di vivace discussione. Manfredini, coinvolto insieme a Brasca nella nascita di GL, non aveva ritenuto opportuno «soffocare la cosa, anche se suscita qualche problema – come scriveva a Montini –. Infatti i giovani avvicinati (circa un migliaio) non sono iscritti alle nostre associazioni e vengono interessati ai problemi religiosi e sono condotti ai SS. Sacramenti»<sup>158</sup>. Movimento o associazione, si legge però negli appunti di Montini, che riassumevano un'ampia istruttoria portata avanti a diversi livelli del mondo cattolico milanese? Azione Cattolica di ambiente o movimento missionario trasversale agli ambienti, fossero i luoghi di lavoro o i quartieri in cui GL si stava diffondendo? E perché non bastava l'AC, nei confronti della quale qualcuno coglieva, tra gli appartenenti

Padovani, e a Dante Ghezzi. Entrambi avevano esperienza di apostolato cristiano tra i giovani di periferia. Don Giussani, sollecitato da Montini ad occuparsi solo di GS, ne lasciò la direzione all'assistente diocesano della GIAC don Luigi Olgiati. I gruppi di GL, peraltro, erano fondati da responsabili della GIAC. E tuttavia era Giussani a tenere agli incaricati di GL, settimanalmente, una lezione di teologia sulla Chiesa. Inoltre Gioventù Lavoratrice si richiamava al metodo pedagogico giessino, incentrandosi sul momento del raggio e su un'intensa vita liturgica e sottolineando il valore dell'«esperienza di vita cristiana, di comunità ecclesiale». Con il termine «movimento» – spiegava Alberto Antoniazzi della Presidenza della GIAC milanese – si intendeva anzitutto esprimere «una preoccupazione comunitaria», che induceva non tanto a cercare una testimonianza individuale nell'ambiente di lavoro, «quanto a creare una presenza comunitaria, e ad inserire la comunità d'ambiente (cioè i vari 'gruppi' o 'raggi') in un movimento più ampio, che ne integri la capacità formativa ed apostolica e sia di tramite ad un inserimento sempre più consapevole e totale nella grande comunità della Chiesa». GL, poi, era attenta alle tre dimensioni cultura, carità e missione, che sin dalle origini caratterizzavano la GS di don Giussani, e partecipava all'iniziativa della Bassa e alle attività missionarie lanciate da GS (ADM, ASAM, 167N, 1808, dattiloscritto intitolato «La Presidenza diocesana della G.I.A.C. ed il movimento 'Giovani Lavoratori'», datato 24 febbraio 1962 e indirizzato da Antoniazzi a Montini).

<sup>157</sup> ADM, ASAM, 167N, 1808, «La Presidenza diocesana della G.I.A.C. ed il movimento 'Giovani Lavoratori'». Alla giornata di studio che si era svolta a Gazzada nel settembre del '61 e che aveva lanciato GL avevano partecipato 150 persone, tra cui un certo numero di ragazze. Erano presenti Giancarlo Brasca e Manfredini. Nel febbraio del '62 i giovani che facevano regolare riferimento a GL erano circa 600, raccolti in 14 gruppi presenti in aziende e in quartieri periferici. Il numero era però in crescita, grazie all'ampio orizzonte di simpatizzanti che si stava addensando attorno a GL.

<sup>158</sup> ADM, ASAM, 167N, 1808, lettera del 27 febbraio 1962.

a GL, una certa «sfiducia»? Gli aspetti positivi non mancavano, annotava Montini, ma GL poteva nuocere alle associazioni cattoliche tradizionali. Dalle ACLI venivano segnali di ostilità, sebbene Gioventù Lavoratrice sostenesse che il proprio ambito di impegno era diverso da quello aclista. E poi c'era la Gioventù Femminile, contraria al «promiscuo» che aveva contagiato anche GL e decisa a difendere la propria competenza sui movimenti giovanili femminili e a negare l'eventualità di alternative apostoliche all'Azione Cattolica e alla strutturazione parrocchiale, che dovevano rimanere epicentro obbligato di qualsiasi militanza negli ambienti<sup>159</sup>. Da «metodo di avvicinamento» GL – annotava Montini – si stava trasformando in «movimento comunitario»: non era escluso il rischio dell'autosufficienza, paventato da voci ostili a Gioventù Lavoratrice, un rischio che l'arcivescovo voleva evitare<sup>160</sup>. Alcuni parroci, peraltro, scorgevano in GL una volontà di antagonismo nei confronti delle parrocchie e delle associazioni di ramo, che avrebbero dovuto essere, al contrario, luogo di formazione naturale dei «vicini» i quali, poi, ben preparati, avrebbero esercitato con maggior decisione l'apostolato missionario verso i «lontani». Le iniziative «dal basso», si notava, erano pericolose, così come l'attentato all'unità di lavoro tra parroci e coadiutori e la stessa formazione di comunità cristiane d'ambiente, che richiamavano alla mente esperienze francesi i cui esiti erano messi in discussione. La comunità, si sosteneva, coincideva con la parrocchia, e non vi era alcun bisogno di nuove forme aggregative, anche se il panorama del mondo giovanile era sconcertante e non faceva ben sperare, essendo già molto distante dalla Chiesa e dal cristianesimo<sup>161</sup>. Critico, per motivi analoghi, monsignor Guido Augustoni, presidente del Collegio dei parroci urbani, che temeva l'allontanamento dei giovani dalle parrocchie, le quali – a suo dire – dovevano rimanere il centro di diffusione della GIAC<sup>162</sup>.

<sup>159</sup> Si veda il dattiloscritto intitolato «Apostolato negli ambienti di lavoro», attribuito da una scritta a penna a don Cesare Pagani e risalente al 1962. Si vedano anche le lettere di Maria Teresa Brambilla a Montini, del 26 maggio e del 4 settembre 1962, con allegata relazione dattiloscritta (ADM, ASAM, 167N, 1808).

<sup>160</sup> ADM, ASAM, 167N, 1808, appunti manoscritti, alcuni datati 14 febbraio 1962. Accanto al nome di don Ezio Orsini, assistente provinciale delle ACLI, si legge: «Non vede come si possa». Antoniazzi notava che per Orsini il compito della GIAC era quello di dare uomini preparati alle ACLI, evitando il tema dei rapporti tra evangelizzazione e azione sociale. Tra le carte della Segreteria dell'arcivescovo si trovano anche alcuni dattiloscritti, che non recano l'indicazione né della data né dell'autore, in cui erano evidenziati più ampiamente alcuni interrogativi concernenti GL, il suo metodo pedagogico e la scelta, che sembrava da farsi, tra AC di ramo o AC d'ambiente. In altri documenti si prospettavano ipotesi per risolvere il problema del rapporto tra GL e le parrocchie e per chiarire il profilo istituzionale del nascente movimento.

<sup>161</sup> Queste le considerazioni presenti in una lettera di un parroco, don Aldo Gesseca, a don Luigi Olgiati, assistente della GIAC (ADM, ASAM, 167N, 1808, 28 luglio 1962), che durante la quattro giorni assistenti del febbraio 1962, svoltasi a Sesti Levante, aveva preso le difese sia di GS sia di GL. Si veda Busani, *Dall'organizzazione al movimento*, cit.

<sup>162</sup> «Non accondiscendiamo forse un po' troppo a continui esperimenti?», aggiungeva Augustoni. «La Francia non ci può insegnare qualcosa? Bisogna intervenire con decisioni drastiche». Augustoni, che deprecava la formazione di «chiesuole» e di «pseudo comunità» e

L'ipotesi di un riconoscimento di GL da parte dell'arcivescovo, che cominciava a circolare<sup>163</sup>, suscitava dunque un'alzata di scudi. Una conferma autorevole, infatti, comportava l'inserimento definitivo di GL nell'Azione Cattolica e, soprattutto, l'attestazione della bontà della sua impostazione educativa e, di conseguenza, dello stesso metodo di GS, che GL aveva acquisito. La Presidenza della Gioventù Femminile faceva notare che tale approvazione non doveva essere scontata, dal momento che vi era una differenza tra l'indirizzo pedagogico di GL e quello di AC, il primo incentrato sull'«esperienza», soggettiva e comunitaria, il secondo sulla fede, sui sacramenti e sul Corpo mistico. Scegliere per la forma del «movimento», affidando ad essa e non a «gruppi di militanti» la «penetrazione missionaria» negli ambienti, significava – si diceva – optare per il primo metodo, a scapito del secondo<sup>164</sup>. Tale dialettica tra fede ed esperienza della fede, sottolineata da alcune voci cattoliche che, forse inconsciamente, riportavano a galla echi irrisolti della crisi modernista, evidentemente metteva in discussione non solo la sopravvivenza di GL, ma la valutazione dell'impostazione specifica di GS, che molti faticavano a capire e a condividere. Certo, GS prima e GL dopo avevano dato nuovo slancio missionario all'apostolato giovanile, un dato che non si poteva disconoscere e che era considerato con circospezione da chi dubitava dell'opportunità dei due esperimenti. Le strutture parrocchiali, ancora solide, avevano scarsa incidenza negli ambienti di lavoro, come lo stesso Montini aveva rilevato, auspicando che l'annuncio evangelico fosse esteso ai lavoratori<sup>165</sup>. Se però l'AC fosse stata investita da una rinnovata istanza missionaria – si ribadiva nella GF – non ci sarebbe stato più bisogno di GL.

Nell'estate del '62, in preparazione del sinodo minore del settembre successivo, si poneva insomma, in maniera più dirimpente che nel passato, il problema della natura di entrambi gli esperimenti, come pure quello del loro coordinamento con la GIAC e dell'autonomia di cui, insieme ad altre opere prodotte dal mondo cattolico, avevano in qualche modo sino allora goduto<sup>166</sup>. In agosto si teneva,

difendeva l'autorità dei parroci, rilevava che si trattava pur sempre del metodo di GS, cui occorreva dare «maggior sensibilità parrocchiale» e «maggior presenza sacerdotale» (ADM, ASAM, 167N, 1808, lettera del 21 marzo 1962).

<sup>163</sup> Si veda Busani, *Dall'organizzazione al movimento*, cit.

<sup>164</sup> «Qui gente che parte soprattutto dai fatti, dall'esperienza, dal mettersi insieme – scriveva Maria Teresa Brambilla –, là gente che parte da una fede consapevole, dal Battesimo e dalla Cresima, dal Corpo Mistico [...]. Una mancata distinzione finirebbe per ridurre le associazioni giovanili di A.C. a Movimento (e per di più promiscuo!)» (ADM, ASAM, 167N, 1808, relazione allegata alla lettera del 4 settembre 1962). Una valutazione negativa veniva anche dalla FUCI, che chiedeva a Montini il ridimensionamento di GS, accusata di puntare sui sentimenti e sull'azione, a discapito dell'impegno intellettuale e della ricerca della verità (Busani, *Dall'organizzazione al movimento*, cit.).

<sup>165</sup> A. Acerbi, *Giovan Battista Montini, da assistente della FUCI ad arcivescovo di Milano*, Bologna, Centro stampa Di Risio, 1988, pp. 34-35.

<sup>166</sup> Si veda il dattiloscritto di parecchie pagine, intitolato «Progetto di coordinamento tra le opere cattoliche giovanili per un più efficace apostolato tra i ragazzi ed i giovani», che

in arcivescovado, una riunione presieduta da Montini e con la partecipazione di Manfredini e degli assistenti coinvolti nella pastorale giovanile, in assenza però di don Giussani, che era in Brasile. All'ordine del giorno, insieme alla «questione dell'avvicinamento e dell'educazione giovanile cristiana», vi era un punto relativo a «giudizi e suggerimenti circa le due nuove formazioni GS – GL»<sup>167</sup>. Montini, pur richiamando gli intervenuti alla necessità di tenere a mente i «fini» e la «realità teologica» cui si connettevano, lasciava libero il dibattito che, come testimoniano le sue note, faceva emergere punti di vista diversi, sia sulla valutazione della situazione giovanile, sia sul coordinamento tra i nuovi movimenti e i luoghi educativi tipici della tradizione ambrosiana. Manfredini partiva dal dato di fatto che «la Parr[occhia] non basta da sé – nasce perciò il “movimento”». GS gli sembrava esperimento «positivo», anche se il suo metodo era da integrare con un'apertura verso la parrocchia e la GIAC; quanto a GL, gli pareva «da favorire» e «da perfezionare». Nondimeno, riteneva necessaria una parola autorevole che dicesse «se si p[oteva] continuare, o no». I nuclei aziendali delle ACLI erano finalizzati alla risoluzione dei problemi specifici del mondo del lavoro e dunque non potevano dedicarsi all'«annuncio religioso», di cui GL si era fatta carico. «Non è movimento esplosivo e esaltato», affermava Manfredini, che difendeva Gioventù Lavoratrice dall'accusa di aver messo la gerarchia ecclesiastica di fronte ai «fatti compiuti». Diversa la posizione di don Orsini, delle ACLI, per il quale ogni ambiente aveva bisogno di un metodo specifico; era quindi sbagliato applicare la metodologia giessina ai lavoratori. Barbareschi, pur esprimendo un «giudizio positivo» su GS, riconfermava le sue obiezioni sul promiscuo e sullo «sradicamento dalla famiglia», mentre Luigi Olgiati, assistente della GIAC, definiva GS «come azione missionaria nell'ambiente» e collocava GL «in fase sperimentale». Don Pagani, legato alla Gioventù Femminile, voleva salvaguardare il ruolo dei sacerdoti. Se GS era «positiva», doveva però riconoscere i suoi limiti, respingendo le contaminazioni dell'ambiente in cui operava, a cominciare dalla coeducazione. Il giudizio su GL era invece duro: «Sembra doversi sopprimere», annotava Montini. Don Vanni Padovani interveniva per ricordare che GS stava tentando di «migliorare» rispetto agli addebiti che le erano mossi, anche se le «obbiezioni sulla promiscuità» non gli parevano fondate, come pure quelle sulle tensioni con le famiglie dei giessini.

contiene la proposta articolata dalla GIAC milanese (ADM, ASAM, 208N, 2). In realtà GS e la GIAC ambrosiana erano collegate da un crescente rapporto di affinità, che aveva contribuito a trasfondere nella stessa GIAC spunti educativi maturati in GS (Busani, *Dall'organizzazione al movimento*, cit.).

<sup>167</sup> ADM, ASAM, 208N, 2, appunti manoscritti di Montini, datati 23 agosto 1962 (il giorno in cui si svolse la riunione). Nello stringato resoconto che Montini faceva dei diversi interventi compaiono i nomi, tra gli altri, di Manfredini, Olgiati, Barbareschi, don Lorenzo Longoni (dell'Ufficio diocesano oratori), Pagani, Augustoni, Orsini e Padovani.

GS, sosteneva, era «strumento miss[ionario] dell'A.C.»; GL, a sua volta, aveva «bisogno di sentirsi apprezzata»<sup>168</sup>.

La discussione, tuttavia, doveva esser stata ben più accesa di quanto facciano pensare gli appunti di Montini. Lo testimonia una lettera di Padovani, del giorno successivo, in cui il collaboratore di Giussani esprimeva la propria amarezza «per l'inadeguata origine che gran parte» degli interventi aveva tradito; «le critiche e gli appunti rivolti a Gioventù Studentesca – scriveva – nascevano [...] da osservazioni frammentarie, da incontri episodici, da impressioni non controllate, invece che da una conoscenza adeguata del movimento nel suo spirito e nei suoi gesti autentici». Padovani raccontava del suo «profondo smarrimento, in un momento in cui le gravi decisioni da prendere richiederebbero – da parte di tutti coloro che in qualche modo vi collaborano – un'autentica capacità di chiarezza». Prima di qualsiasi decisione, in ogni caso, andava ascoltato don Giussani, visto che GS era stata al centro del dibattito<sup>169</sup>. «Dispiacere» e disappunto esprimeva anche Olgiati, che si era sentito messo sotto accusa dall'«anonimo gran parlare» dei giorni successivi alla riunione<sup>170</sup>. Lo stesso Manfredini rimandava di qualche tempo le proprie considerazioni su quanto era successo, non sentendosi «l'animo tranquillo per farlo con tutta serenità»<sup>171</sup>.

Se si tiene conto di un contesto così poco sereno, dove le posizioni erano ormai divaricate e si faceva fatica a formulare ipotesi che tenessero conto dei diversi punti di vista, acquista maggior rilevanza la decisione presa dall'arcivescovo in occasione del sinodo minore del 27 settembre 1962. Prima del sinodo, Giussani e Padovani avevano preparato una replica scritta alle accuse mosse a GS, che inviavano a Montini per «chiarire – gli scrivevano – quale sia la nostra posizione di coscienza di fronte alle perplessità» manifestate da Montini. «Se il Vescovo non accettasse più G.S.», assicuravano, «dall'oggi al domani noi scioglieremo

<sup>168</sup> *Ibid.*

<sup>169</sup> Nella lettera emergono alcuni passaggi del dibattito che si era svolto in arcivescovado: «Si è definita come una “evasione” l'iniziativa missionaria di G.S. in Brasile, “disincarnata e astratta” la nostra metodologia, carente di spirito di sacrificio la nostra impostazione ascetica, esclusivista o settaria l'educazione alla comunità [...]. Non si tratta tanto della validità dei giudizi – affermava il sacerdote –, ma della oggettività e della completezza dei dati che si vogliono impugnare! Noi non vorremmo insomma che la difficoltà che sempre sorge dal nuovo, l'ardore con cui si difendono altre posizioni, la gradualità inevitabile dei risultati da noi raggiunti e, soprattutto, la difficoltà con cui avvengono certi raccordi, impedisca[no] a taluno persino di constatare con lealtà quello che il nostro movimento in realtà è» (ADM, ASAM, 208N, 2, lettera del 24 agosto 1962).

<sup>170</sup> ADM, ASAM, 208N, 2, lettera dell'8 ottobre 1962 di Olgiati a Montini. Il sacerdote diceva che più volte, in quei «mesi di sofferenza», era stato sul punto di chiedere all'arcivescovo di sollevarlo dall'incarico di assistente della GIAC. Ora si rimetteva alla decisione di Montini, anche se la GIAC – scriveva – stava vivendo un momento di ripresa, «soprattutto nella genuinità della impostazione e nella vivacità dell'apparato organizzativo», tanto è vero che i gruppi delle altre diocesi facevano riferimento all'esperienza milanese e che i seminaristi di Venegono provenivano in maggioranza proprio dalla GIAC.

<sup>171</sup> ADM, ASAM, 166N, 1804, lettera a Montini del 17 settembre 1962.

tutto». Allo stesso tempo, tuttavia, chiedevano a Montini, con tono accorato, che non fosse «anche solo diminuita una attività apostolica e pastorale che l'esperienza mostra[va] così carica di frutti reali. Il pericolo di male applicazioni, che altri tentasse, potrebbe essere circoscritto – osservavano – da precise responsabilità date alla Gioventù Studentesca centrale»<sup>172</sup>. Pure Manfredini, a pochi giorni dal sinodo, articolava più chiaramente le ragioni del suo «giudizio di massima favorevole» su GS e GL, un giudizio «più sicuro» sulla prima e meno sulla seconda la quale, «essendo agli inizi, non presenta[va] ancora una fisionomia definita». Manfredini era convinto che le parrocchie milanesi non fossero più in grado di raggiungere i «lontani» e che dovessero essere ricondotte «all'essenza» della loro missione, con l'aiuto di iniziative capaci di dilatarne l'azione. L'evangelizzazione dell'ambiente, continuava, era «di gran lunga più incisiva e più continua» se portata avanti da cattolici che non agivano solo come singoli, ma come appartenenti alla comunità cristiana. Proprio per questo GS e GL, sia pure in misura diversa, gli sembravano valide, prefiggendosi «di recare un annuncio cristiano essenziale (il Kerygma) in modo forte, chiaro, esplicito, senza attenuazioni». Si trattava di un'«intuizione di fondo» che, con i debiti adattamenti, era applicabile oltre i confini della scuola. Per il delegato arcivescovile il tentativo dei due movimenti era certo perfettibile, anche perché doveva trovare il modo di raccordarsi con le associazioni preesistenti. E tuttavia, aggiungeva,

<sup>172</sup> Il riferimento potrebbe essere a GL, che tuttavia non era menzionata. I due sacerdoti aggiungevano di aver cercato, «come movimento nato dall'Azione Cattolica», di «essere sempre molto fedeli nella dipendenza dalla Presidenza Diocesana. Il richiamo ad una rigorosità più precisa e completa in tal senso ci troverà ubbidienti e lietamente ubbidienti». Raccontavano poi di essersi sempre riferiti a Giovanni Colombo, come Montini aveva loro raccomandato (ADM, ASAM, 166N, 1804, lettera del 14 settembre 1962). In allegato alla missiva, inviavano l'elenco delle letture consigliate ai giessini (volumi di argomento biblico, teologico, patristico, liturgico, di spiritualità, di morale e concernenti la dottrina sociale della Chiesa) e un dattiloscritto in più pagine che rispondeva alle critiche sollevate contro l'impostazione pedagogica di GS. I punti trattati riguardavano i rapporti con le parrocchie e l'AC, le attività promiscue e il valore dell'«esperienza», rilevato in GS perché si riteneva che solo «un impegno con la realtà cristiana» potesse aiutare a «capire le idee che intellettualmente la esprimono. La lunga pratica fra i giovani – osservavano – ci ha reso evidente come normalmente alle “parole” cristiane – anche dotte – non corrisponda nella loro coscienza alcun richiamo concreto: i giovani quindi sono normalmente portati a sentire la dottrina cristiana astratta e senza significato per la loro esistenza, oppure a intenderla razionalisticamente. La nostra preoccupazione è un 'innanzitutto': innanzitutto occorre sviluppare l'area di contatto fra la realtà cristiana obbiettiva e la persona intera del giovane: allora anche la dottrina sarà capita nei suoi sensi veri [...]. Siccome la realtà cristiana è la Chiesa, noi diciamo normalmente che l'esperienza del cristianesimo si compie impegnandosi con quella vita comunitaria che rende presente la Chiesa nel proprio ambiente. L'esperienza della comunità – come la sottolineiamo – si oppone energicamente ad una situazione sentimentale ('gruppo di amici', corrispondenza di simpatia etc.), così come si oppone dal profondo ad ogni chiusura [...]. Per noi è impossibile psicologicamente pensare di continuare senza la assoluta sicurezza dell'appoggio dell'autorità. Un dubbio solo su questo ci rende impossibile l'intensità stessa del lavoro. Come in questi giorni».

i nuovi movimenti d'ambiente, pur destando tante giuste preoccupazioni, possono, se ben guidati, aiutare la Parrocchia, l'Azione Cattolica, il Clero stesso a rinverdire i metodi, a comprendere meglio la mentalità dei lontani, ad adeguarsi con maggiore sensibilità ai bisogni spirituali del nostro tempo, a reclutare energie per la vigna del Signore. In fondo, quella che ci tiene in ansia e in discussione mi pare una crisi di crescita. Crescere è un fatto positivo: è la fioritura della vita, sia pure fra stenti e rischi.

Manfredini ricordava le molte vocazioni religiose che stavano fiorendo in GS e in GL. Per definire i rapporti con l'AC parrocchiale e diocesana, era necessario – a suo dire – precisare il campo di azione dei movimenti d'ambiente. GL, ad esempio, avrebbe dovuto limitarsi a operare nelle aziende ed essere seguita da un assistente centrale e da assistenti per ciascun raggio. Particolare attenzione bisognava avere per i quartieri periferici, dove l'evangelizzazione affidata alle parrocchie doveva essere più incisiva<sup>173</sup>.

Il delegato arcivescovile interveniva dunque per sostenere i due movimenti; probabilmente, però, la sua lettera arrivava a Montini solo il giorno dopo il sinodo<sup>174</sup>. È quindi plausibile che la «schiarita totale d'orizzonte» prodotta dal sinodo<sup>175</sup> dipendesse anzitutto dalla decisione dell'arcivescovo, che pure conosceva le posizioni di coloro che erano intervenuti nelle discussioni di quei mesi. Montini volle infatti che, durante il sinodo, monsignor Oldani, vicario generale della diocesi, leggesse una disposizione intitolata «Norme circa la formazione cristiana della Gioventù», che aveva scritto di suo pugno e sottoposto preventivamente al parere di Augustoni<sup>176</sup>. Attraverso questa disposizione, che faceva il punto sulle problematiche dibattute tra i sacerdoti diocesani, riuscendo a valorizzare al tempo stesso sia i suggerimenti di Manfredini sia, in parte, quelli di Augustoni, l'arcivescovo evidenziava la necessità di un'«autentica formazione cristiana» della gioventù e rilevava che la «forma pastorale ordinaria» rimanevano gli oratori e le associazioni di AC, articolate in maschili e femminili. Alla GIAC e alla GF, da non ritenersi superate, occorreva dare, «con metodi specificatamente adeguati, profondità di vita religiosa, costanza di coerenza cristiana, e audacia di testimonianza e di conquista missionaria», in modo che fossero risvegliate e rinnovate. «Quanto all'apostolato specializzato

<sup>173</sup> ADM, ASAM, 166N, 1804, dattiloscritto intitolato «Note sulla riunione del 23 agosto 1962», allegato alla lettera a Montini del 17 settembre. Quanto alla promiscuità, Manfredini scriveva che era ammessa solo come un dato di fatto dipendente dal contesto in cui si operava e che doveva essere tollerata nelle iniziative connesse alla testimonianza cristiana d'ambiente. Inoltre in GL si doveva favorire la partecipazione alle ACLI, alla CISL e alla DC, «secondo la vocazione e le attitudini di ciascuno».

<sup>174</sup> Sulla lettera, datata 17 settembre 1962, è scritto a mano «ric[evuta] 28.9.62» (ADM, ASAM, 166N, 1804).

<sup>175</sup> Così la definiva Manfredini, vedendo nella decisione di Montini l'occasione di recuperare «serenità e fiducia, dopo settimane di incertezza e di angoscia» (ADM, ASAM, 166N, 1804, lettera a Montini del 27 settembre 1962).

<sup>176</sup> Si veda Busani, *Dall'organizzazione al movimento*, cit.

giovanile d'ambiente' di scuola e di lavoro, specialmente: ne riconosciamo innanzi tutto la necessità e l'efficacia», faceva leggere Montini;

la Parrocchia ha bisogno di dilatare la sua azione anche là dove non arriva il suo ministero ordinario, ha bisogno di coordinare il suo sforzo apostolico con altre Parrocchie e con altre istituzioni, ha bisogno di adattare i metodi di penetrazione e di evangelizzazione alle condizioni particolari e alle esigenze specifiche di ambienti speciali, dove si svolge tanta parte della vita moderna. È programma che dovremo studiare e sviluppare. Riconosciamo intanto ed elogiame i buoni risultati ottenuti da un generoso esperimento di apostolato d'ambiente, Gioventù Studentesca, augurando che abbia sempre a conformarsi ai criteri educativi della Chiesa. Desideriamo che questa ed altre forme di apostolato d'ambiente non si pongano come alternative di metodo e di organizzazione rispetto alle associazioni di Azione Cattolica e alle sue varie iniziative missionarie, ma si propongano piuttosto la convergenza dello sforzo apostolico verso l'autentica comunità ecclesiale, ch'è in pratica la Parrocchia, e la Diocesi. Disponiamo pertanto che i Sacerdoti, i Religiosi ed i Laici cattolici, prima di avviare una iniziativa d'apostolato d'ambiente, la quale si proponga d'assumere forma collettiva, di gruppo o di movimento, chiedano debita autorizzazione, anche per evitare gli inconvenienti dell'arbitrio, della molteplicità e dell'altrui danno<sup>177</sup>.

Davanti ai sacerdoti milanesi riuniti per il sinodo, Montini, dunque, riconosceva GS come «esperimento di apostolato d'ambiente», di cui elogiava i risultati riconoscendone la necessità e l'efficacia. Pur notando che l'associazionismo giovanile tradizionale aveva bisogno di essere risvegliato e rinnovato e che l'azione parrocchiale doveva sapersi confrontare con i luoghi e le condizioni specifiche della vita moderna, l'arcivescovo non faceva diretto riferimento a GL, che però richiamava implicitamente all'obbedienza e alla convergenza con la più ampia comunità ecclesiale, le cui coordinate di fondo rimanevano la parrocchia e la diocesi. Montini, comunque, collocava GS tra gli esperimenti riconosciuti e apprezzati dalla Chiesa, purché si conformassero ai suoi «criteri educativi». Quest'ultima condizione, non presente nel manoscritto originario, era stata aggiunta per sollecitazione di Augustoni, il quale, però, avrebbe voluto un riferimento più specifico e più forte all'accordo con l'AC e con le parrocchie, che Montini alleggeriva. Augustoni, peraltro, gli aveva chiesto di rimarcare la competenza dei parroci anche nei confronti di altre associazioni cattoliche che erano proliferate al di fuori del controllo parrocchiale e che, come il FAC, erano sorvegliate speciali o erano state scoraggiate dall'arcivescovo. Inoltre, il presidente del Collegio dei parroci urbani avrebbe voluto che Montini invitasse la GF e la GIAC a sviluppare un piano apostolico negli ambienti di lavoro, in

<sup>177</sup> ADM, ASAM, 166N, 1804, dattiloscritto intitolato «Norme circa la formazione cristiana della Gioventù», su cui è apposta a mano la data 27 settembre 1962 e che presenta diverse correzioni manoscritte di Montini. Nella stessa posizione archivistica si conservano altre copie di questa disposizione, compresa la prima versione manoscritta stesa dall'arcivescovo. In chiusura del testo, Montini ribadiva la distinzione fra associazioni maschili e femminili e ricordava che la coeducazione era consentita solo nell'apostolato d'ambiente e non era da favorire intenzionalmente. La disposizione è stata pubblicata come supplemento alla «Rivista diocesana milanese» (11, 1962, *Sinodo minore 1962, Norme circa la formazione della Gioventù*, pp. 57-59).



accordo con le parrocchie, con l'Ufficio pastorale e con chi già operava negli ambienti, un invito che però non si trova nella disposizione letta da Oldani<sup>178</sup>.

Ancora una volta, insomma, Montini dimostrava prudenza ma anche attitudine valorizzatrice, stabilendo alcune norme che i movimenti d'ambiente dovevano rispettare ma non dando in tutto e per tutto credito a chi voleva affossare GL e, con essa, il metodo educativo giessino. L'arcivescovo ne recepiva le preoccupazioni, ma le temperava tenendo conto dell'apprezzamento di Manfredini e di Olgiati, che conoscevano da vicino i due esperimenti e li stimavano, pur ritenendo necessarie alcune correzioni di tiro. Montini, tuttavia, credeva che dietro i «problemi organizzativi» vi fossero questioni «spirituali» da affrontare, che lo «tenevano in angustia non poca», come confessava a Manfredini. «Mi sarebbe, sì, di sollievo sapere che si avviano ad una equilibrata soluzione – annotava –. Ma restano molte cose ancora da vedere». Tra i problemi irrisolti per l'arcivescovo c'era appunto GL. Quanto a Giussani, doveva «contenere la Sua attività nel campo che gli [era] assegnato»<sup>179</sup>. Quest'ultima notazione faceva parte del modo con cui l'arcivescovo affrontava le iniziative non riconducibili alla pastorale ordinaria che non intendeva bloccare *a priori*, per valutarne fino in fondo l'efficacia apostolica. Il caso di GS e di GL fa anzi emergere un tratto tipico dell'approccio di Montini ai sacerdoti che in diocesi alimentavano qualche «fermento», un tratto che, però, nel caso di GS era rafforzato e ingrandito dall'incidenza che essa aveva in termini numerici e di testimonianza cristiana. Che all'esperimento, allora, fosse lasciata la libertà di svilupparsi e di mostrare la bontà della propria proposta, dentro uno spazio che, nondimeno, doveva essere mantenuto nei limiti dell'ambito che gli era stato attribuito. Non era scontato – scrive Marta Busani – che l'arcivescovo riconoscesse «la bontà e la necessità di nuove forme di apostolato d'ambiente», le quali, oltre a tutto, sin dagli anni Cinquanta erano state guardate con sospetto dall'Azione Cattolica italiana<sup>180</sup>. A Manfredini, qualche tempo dopo,

<sup>178</sup> ADM, ASAM, 166N, 1804, dattiloscritto che riporta i suggerimenti mandati da Augustoni a Montini con lettera del 20 settembre 1962, dove si scriveva che tali chiarificazioni erano necessarie per «non generare equivoci di interpretazione, e per non lasciare le cose come stanno».

<sup>179</sup> ADM, ASAM, 166N, 1804, lettera del 28 settembre 1962. Manfredini rispondeva il 29 settembre, dicendosi a sua volta persuaso che la questione di GL non era risolta e chiedendo aiuto per «poterla avviare a soluzione. Mi avvedo che molti parlano per sentito dire, mentre spesso mancano di interpellare o di proporre un approfondimento della questione a don Olgiati e a me, che non rifiutiamo una collaborazione serena da nessuno». Il delegato assicurava che avrebbe raccomandato a Giussani di contenere la sua attività nell'ambito che gli era stato assegnato e raccontava che il sacerdote nel passato aveva tenuto conto delle sue osservazioni, istituendo ad esempio un corso di teologia per gli incaricati di GS e potenziando le iniziative formative per le ragazze. «Ultimamente [...] – aggiungeva – mi è sembrato particolarmente docile e disponibile al problema della collaborazione con la F.U.C.I., sia nel Circolo che nei Gruppi di Facoltà. Mons. Carlo Colombo [...] potrebbe confermare le mie impressioni. Naturalmente don Giussani ha il suo temperamento: spesso molti non ne tengono conto e lo aggrediscono, non sempre a ragione, in modo da provocarne le reazioni più vivaci. Sono persuaso, tuttavia, che sia profondamente docile».

<sup>180</sup> Busani, *Dall'organizzazione al movimento*, cit.

Montini avrebbe scritto che «la novità p[oteva] essere quella di considerare venuto il momento per passare dalla Parrocchia e relative opere all'apostolato d'ambiente», da ritenersi «coesistente all'impegno di formazione e di apostolato nell'ambito locale». Clero e associazioni, pertanto, avrebbero dovuto sostenerlo, e la stessa Curia l'avrebbe favorito attraverso l'Ufficio di pastorale sociale, che l'avrebbe coordinato<sup>181</sup>. Gioventù Studentesca si ritrovava dunque innestata nell'impianto pastorale diocesano, come esperimento promettente che doveva essere guardato come tale. Si trattava di un'indubbia apertura, che mostrava un arcivescovo sensibile a cambiamenti ormai irreversibili, anche se sempre in bilico tra la persuasione che i tempi nuovi richiedessero strumenti rinnovati e la convinzione, parallela, che fosse necessario mettere in sicurezza l'impianto tradizionale fondato su argini pedagogici invalicabili – si pensi alla ribadita eccezionalità del promiscuo –, con il rifiuto di contaminazioni modernizzanti che, nell'ottica di Montini, avrebbero potuto sminuire la solidità educativa delle iniziative per la gioventù<sup>182</sup>. Eppure l'arcivescovo, già nei discorsi alla GIAC della metà degli anni Cinquanta, aveva espresso una prospettiva che, in tema di educazione alla moralità, si poteva dire consentanea all'animo con cui Giussani proponeva la coeducazione<sup>183</sup>. All'atto pratico, però, le riserve rimanevano e Montini procedeva con cautela, non nascondendo la sua trepidazione, attenuata da un interesse sincero per l'esperimento giessino il quale, tra l'altro, si stava distinguendo per un atteggiamento non remissivo di fronte alla china laicizzante presente in molti licei milanesi, sopportata passivamente da tanti cattolici con dispiacere dell'arcivescovo<sup>184</sup>.

In ogni caso, GS aveva ora una corsia preferenziale in cui operare, che tra l'altro le permetteva di intensificare la collaborazione con la GIAC. «Ancora più dopo il Sinodo ultimo – scrivevano Giussani e Padovani – desideriamo solo corrispondere il più fedelmente e generosamente possibile a ciò che Vostra

<sup>181</sup> ADM, ASAM, 104, 55, 11 novembre 1962.

<sup>182</sup> Scoppola ha scritto che Montini si è affacciato alla realtà della secolarizzazione intuendone i rischi e i problemi, ma forse non ne ha esplorato sino in fondo le potenzialità, rimanendo «in bilico sulla modernità» (P. Scoppola, *Paolo VI e l'impegno dell'intellettuale*, in *Educazione, intellettuali e società*, cit., pp. 183-184).

<sup>183</sup> Nel discorso ai dirigenti della GIAC dell'11 agosto 1955, Montini aveva ricordato che i giovani «non gradi[vano] più un ordine conseguito con la forza esteriore», perché avevano sviluppato il senso della personalità umana e della dignità interiore. Di fronte a un mondo giovanile che faceva fatica a riconoscere l'autorità, la «soluzione psicologica» non stava nel rinnovare imposizioni esteriori, che lasciavano il tempo che trovavano, ma nel «suscitare il senso interiore della legge consonante con la legge esteriore [...]. Noi dobbiamo educare i giovani all'esercizio del dovere liberamente compiuto. Obbedire per amore» (Montini, *Psicologia de giovani cattolici*, cit., pp. 365-366). Per Montini, come per Giussani, un'intensa sensibilità religiosa avrebbe prodotto, di per se stessa, una più salda centratura morale.

<sup>184</sup> ADM, ASAM, 164, 1751, lettera di Montini a Giussani del 12 febbraio 1963. L'arcivescovo si augurava che «il coraggioso intervento di G.S.» risvegliasse «l'attenzione e l'interesse delle Famiglie, degli Educatori e di tutti coloro a cui sta a cuore l'avvenire morale e cristiano della nostra gioventù».

Eminenza si aspetta da noi»<sup>185</sup>. Il dialogo tra l'arcivescovo e i due sacerdoti, che non rimaneva alla superficie dei problemi ma voleva far emergere i fondamenti delle rispettive posizioni, sarebbe continuato sino all'elevazione di Montini al soglio pontificio<sup>186</sup>. A Roma per i lavori conciliari, l'arcivescovo si rivolgeva di nuovo al «Caro e Rev. Don Luigi Giussani, e al suo Collaboratore D. Giovanni Padovani» con una lunga lettera in cui, di nuovo, esprimeva compiacenza e incoraggiamento per i propositi che li ispiravano e fiducia «nella bontà dei principii e degli scopi che – scriveva – informano le vostre intenzioni, nella fedeltà che professate alla Chiesa, alle sue autorità e alle sue istituzioni [...]. Mi sta a cuore il vostro esperimento, e non desidero di meglio ch'esso abbia esito positivo sempre migliore», assicurava. Proprio per questo faceva alcune raccomandazioni, che puntavano a inserire GS «nel quadro più vasto del ministero diocesano» ribadendo le indicazioni già evidenziate al sinodo. Chiedeva cioè che il loro lavoro non interferisse con «quello di altre istituzioni ufficialmente riconosciute e raccomandate», vale a dire le parrocchie e l'Azione Cattolica, cui GS avrebbe dovuto destinare i giovani «più idonei» a servirle. Con parole per nulla ovvie, visti i dubbi dottrinali che erano emersi su tale aspetto, Montini esprimeva apprezzamento per il «senso comunitario» cui GS educava gli studenti. Si trattava, in ordine di tempo, della prima approvazione di un aspetto che era decisamente rilevante nell'impostazione giessina. «È un'idea luminosa», scriveva l'arcivescovo. «E sarà veramente educatrice e benefica, se avrà motivo e forza nella carità, nel principio soprannaturale, che da umana la fa diventare cristiana, e che la realizza nella capacità di superare l'individualismo proprio dell'età e della psicologia di chi studia». L'orizzonte comunitario, aggiungeva, doveva essere pienamente ecclesiale e «universale», e dunque missionario, una caratteristica che già connotava molte iniziative di GS. Seguivano le consuete raccomandazioni sul promiscuo e poi un appunto su Gioventù Lavoratrice: «Non mi sento di proibire ciò che già esiste», scriveva Montini che non voleva turbare chi vi apparteneva. «Ma non posso approvare ch'essa si affermi come la formula normale e preferita d'apostolato d'ambiente o di associazione giovanile nel campo del lavoro». Dunque Giussani e Padovani circoscrivessero il loro operato alla scuola, «un campo immenso, dagli innumerevoli bisogni, dalle inesauribili risorse», dove avrebbero potuto alimentare una «pedagogia cristiana più completa e moderna»<sup>187</sup>. Attraverso

<sup>185</sup> ADM, ASAM, 167N, 1810, lettera a Montini del 5 ottobre 1962.

<sup>186</sup> Marta Busani nota che si intensificava così un dialogo tra Montini e Giussani, che permetteva al sacerdote di chiarire alcuni aspetti della metodologia pedagogica di GS (*Dall'organizzazione al movimento*, cit.).

<sup>187</sup> ADM, ASAM, 104, 55, copia della lettera inviata dal Vaticano l'11 novembre 1962. La missiva, di cui si conserva anche la versione manoscritta, si concludeva con la «trepidazione» di Montini per gli sconfinamenti dei due sacerdoti sul campo altrui che, a suo dire, potevano nuocere alla profondità e alla stabilità del loro lavoro, facendone un'«opera chiusa». Ma «la vostra ansia di bene – aggiungeva – vi preserverà da ogni dissipazione e da ogni pretesa di sufficienza, e vi conserverà e perfezionerà nel vostro esemplare e umile coraggio [di] apostoli della nostra

Manfredini, l'arcivescovo faceva avere questa lettera agli assistenti di GIAC e GF, evidentemente perché aveva «un certo valore normativo»<sup>188</sup> e perché servisse a rasserenare l'orizzonte diocesano.

I primi mesi dell'anno successivo, vale a dire gli ultimi della presenza in diocesi di Montini, rimasero però contrassegnati da tensioni e incomprensioni, cui si aggiungeva il timore dell'arcivescovo che, dentro le associazioni di AC, si diffondessero prospettive che gli sembravano da disapprovare. Vi erano già state avvisaglie nella FUCI<sup>189</sup>, per non parlare della disillusione con cui Montini affrontava il tema della Base democristiana<sup>190</sup>. La testimonianza di GS nelle scuole esprimeva invece un «atteggiamento coraggioso e idealmente coerente» che l'arcivescovo lodava<sup>191</sup>. Nondimeno, rimaneva aperta la questione

Gioventù Studentesca». Nello stesso giorno Montini scriveva a Manfredini, mandandogli la lettera indirizzata a Giussani e Padovani e affrontando di nuovo la questione di GL, che gli dava «qualche apprensione, per la sua novità, per la imprecisione del suo programma, per le reazioni suscitate nel campo nostro». Ad inquietare l'arcivescovo, in realtà, era anche e soprattutto la mancanza di un «nostro piano per avvicinare ed educare la Gioventù Lavoratrice». Tale piano pastorale doveva «ammettere un pluralismo di iniziativa e di metodi», nel quale però l'attività parrocchiale fosse in prima linea. Quanto all'apostolato d'ambiente, l'AC doveva fare opera di «allenamento» senza porsi «come esclusiva», ma come «base normale dove si forma la coscienza e la capacità di apostolato». Da potenziare, inoltre, gli «incontri aziendali» collegati alle ACLI, che erano da raccordare con i parroci. E tuttavia i giovani dovevano avere «un loro proprio apostolato», le cui «prime sorgenti» dovevano rimanere la GIAC e la GF. «Una 'Gioventù Lavoratrice' che non partisse da queste basi – affermava Montini – costituirebbe un movimento nuovo, fuori dai quadri e perciò autonomo e non responsabile, senza alimento assicurato, destinato ad assorbire forze senza poi poterle immettere ordinatamente nella comunità parrocchiale o cattolica o sociale riconosciuta». Dunque GL non era né da riconoscere né da incoraggiare, anche se l'arcivescovo non intendeva sopprimerla: poteva «rimanere come prolungamento missionario della GIAC», un «suo esperimento di apostolato d'ambiente», che però doveva lasciare alla GF la cura delle ragazze che lavoravano.

<sup>188</sup> Busani, *Dall'organizzazione al movimento*, cit.

<sup>189</sup> Si veda copia della lettera a Barbareschi del 24 agosto 1962, siglata probabilmente da Macchi, che faceva sapere la preoccupazione di Montini per una pubblicazione il cui tono e le cui affermazioni facevano pensare a «una mentalità laicista veramente pericolosa» (ADM, ASAM, 104, 54).

<sup>190</sup> Sono vari i riscontri documentari in questo senso. Basti qui ricordare la lettera del 27 dicembre 1960 mandata da Montini ad Alberto Castelli, segretario della CEI, che in un passaggio sottolineava le riserve dell'arcivescovo: «È doloroso che i 'nostri' (se pur tali sono ancora quelli che si qualificano della 'Base' e non pochi loro seguaci) non tengano alcun conto delle nostre esortazioni, e siano in posizione perfettamente antitetica al giudizio comune dell'Episcopato circa il pericolo d'intesa col Socialismo, in queste presenti condizioni; per loro non è pericolo, ma speranza e scopo da raggiungere senza timori e pentimenti» (ADM, ASAM, 318, 13).

<sup>191</sup> ADM, ASAM, 164, 1751, lettera a Giussani del 2 febbraio 1963. Montini si riferiva ad alcuni episodi verificatisi nei licei cittadini, che avevano visto i gesuiti opporsi ai tentativi di «mortificare le convinzioni religiose tradizionali» e di impedire «una formazione culturale cristiana» (Giussani a Montini, 22 gennaio 1963). «Gradirò averne qualche più completa notizia – scriveva Montini –. Non voglio intanto tacere la compiacenza e la consolazione che tale dirittura spirituale e morale reca all'animo mio ed a quello del nostro campo cattolico». Dopo aver letto la documentazione inviata da Giussani, l'arcivescovo gli mandava una nuova lettera in cui, tra l'altro, scriveva: «Mi è gradito notare la chiarezza della professione cattolica di G.S., la coraggiosa

di GL, affrontata da Montini nei colloqui con i responsabili della pastorale giovanile diocesana, in vista di una decisione definitiva che però pareva ancora prematura. L'arcivescovo evidentemente, pur auspicando il rinvigorimento della «spiritualità del lavoro», compito affidato alle ACLI, non era meno sensibile all'urgenza di favorire la rinascita di una «presenza cristianamente operativa» che GL, appunto, offriva agli impiegati milanesi, per l'addietro refrattari ad ogni coinvolgimento. Quanto agli operai, GL non li aveva implicati, se non saltuariamente. Definita da Olgiati «precisazione metodologica» e «azione missionaria» della GIAC<sup>192</sup>, GL aveva conseguito risultati sorprendenti per gli stessi promotori, moltiplicandosi «quasi per generazione spontanea» e con la «premura di suscitare una cosa viva piuttosto che formulare uno schema». Proprio per questo, per l'assistente della GIAC si poneva il problema «di imbrigliare meglio per valorizzare», correggendo i limiti dell'esperimento, a cominciare da una qualche incomprendenza per associazioni e parrocchie, che era capibile tenendo conto del fatto che spesso gli aderenti erano giovani e per di più convertiti, che avevano scoperto altrove «un cristianesimo fervido»; vi erano poi certe «caratteristiche di iniziazione», come l'intensità, l'immediatezza e gli accenti autoritari a volte percepibili nei raggi, caratteri che dovevano indurre gli appartenenti al movimento, in un secondo tempo, a cercare la maturità della vita cristiana in parrocchie e associazioni capaci di accoglierli. Per Olgiati, tuttavia, non si poteva negare l'efficacia di GL, «dovuta anche alla serietà di impostazione». Si trattava allora di trovare formule di collaborazione che potenziassero la «complementarietà» tra i movimenti e le associazioni parrocchiali, non rinunciando però alla libertà, che era e doveva rimanere la caratteristica dell'azione missionaria di Azione Cattolica<sup>193</sup>.

e devota dedizione ai principii cristiani, e la fervorosa volontà di contribuire, anche con sacrificio, alla loro buona testimonianza» (12 febbraio 1963).

<sup>192</sup> ADM, ASAM, 102, 31, dattiloscritto intitolato «Pro memoria su la G.L. (Giovani Lavoratori)», inviato da Olgiati a Montini con lettera del 4 gennaio 1963. L'assistente della GIAC ribadiva che GL mirava a incontrare «i giovani là dove normalmente vivono per proporre loro l'annuncio evangelico, e quindi sul terreno antistante ogni scelta sindacale e politica, le quali sarebbero poi state presentate a chi si fosse fatto cristianamente più maturo, come doverosa concretizzazione dell'amore verso il prossimo». L'obiettivo era quello di creare «cristiani consapevoli: fine, questo, squisitamente religioso e tipico dell'Azione Cattolica e che ben difficilmente può raggiungere, specialmente nei riguardi di chi è religiosamente lontano, una organizzazione che ha le sue scelte sindacali e politiche». Quanto al metodo prescelto da tale esperimento missionario, vale a dire «una comunità di giovani che credono e fanno soprattutto quello che è essenziale: la verità, la carità, la liturgia», a detta di Olgiati non era inteso «come un temporaneo confluire insieme di persone, ma come un "modo di vivere" che fosse proposta per i lontani e aiuto per i vicini». La descrizione di Olgiati riprendeva alcuni passaggi presenti nei libretti con i quali Giussani stava spiegando il metodo di GS.

<sup>193</sup> *Ibid.* Olgiati, che faceva alcune proposte concrete, concordava sull'opportunità di «limitare l'espressione del "movimento" alla città di Milano», ma ipotizzava di estenderlo tentando «raggi di operai».

I dubbi sulla natura di Gioventù Lavoratrice tuttavia permanevano, alimentati dall'ostilità di settori cattolici che, sino allora, avevano avuto l'appannaggio esclusivo del mondo del lavoro. La Presidenza diocesana delle ACLI tornava all'attacco, accusando GL di distogliere i giovani dall'impegno sociale e sindacale<sup>194</sup>. «Disagio e critiche» nei confronti di GS e di GL si dovevano anche all'impressione che le «concrete e specifiche direttive» delle autorità preposte da Montini all'assistenza dei giovani sembravano non del tutto corrispondenti allo «spirito» che si credeva ispirasse i discorsi pubblici sia dell'arcivescovo, sia del pontefice, soprattutto «in relazione al Concilio». Al contrario, l'azione dei cattolici avrebbe dovuto essere «adeguat[a] ai caratteri del mondo moderno», conformandosi a «pluralismo ideologico e culturale», laicità delle strutture sociali, rispetto «per il lento cammino delle anime verso la verità» e «dialogo per la concordia civica e la pace sociale». L'«invadenza» di GS – si affermava – aveva altre preoccupazioni e proprio per questo non avrebbe dovuto godere dell'appoggio dell'autorità diocesana, che era invitata a redigere una «carta educativa per la gioventù» dalla quale i suoi delegati non potessero prescindere<sup>195</sup>. L'arcivescovo, però, non raccoglieva la richiesta, appellandosi invece, ancora una volta, al consiglio di Giovanni Colombo, il quale ribadiva la valutazione favorevole a GS già espressa nel '61. Quanto a GL, il rettore dei seminari diocesani sosteneva di non avere «informazioni sufficienti per esprimere un giudizio», suggerendo di circoscriverne l'azione, «ad esperimento», alla «città di Milano e periferia... dove ogni altra organizzazione d'ispirazione cattolica fa[ceva] troppo scarsa presa»<sup>196</sup>. La documentazione analizzata dimostra che le apprensioni di Montini non riguardavano né le persone, né le loro intenzioni o le opere da loro prodotte. Semmai gli pareva da accertare la bontà del metodo, e per verificarla chiedeva aiuto a vescovi che avevano avuto a che fare con i giessini<sup>197</sup>. I toni di Montini, in ogni caso, continuavano ad essere pacati. La

<sup>194</sup> Si veda Busani, *Dall'organizzazione al movimento*, cit.

<sup>195</sup> ADM, ASAM, 166N, 1804, dattiloscritto intitolato «Circa la gioventù cattolica milanese disagio e critiche (a 'G.S. e G.L.')», datato 1963 e non firmato, anche se attribuibile all'ambiente fucino.

<sup>196</sup> Il 15 marzo 1963 Montini gli aveva inviato le lettere dell'11 novembre 1962 da lui indirizzate l'una a Giussani e Padovani e l'altra a Manfredini, pregandolo di restituirgliene insieme ai «Suoi consigli per me – scriveva – preziosissimi». Colombo rispondeva con un appunto manoscritto, da lui siglato e datato 29 maggio 1963, dove richiamava la questione della «promiscuità dei ragazzi e delle ragazze» sia in GS sia in GL, che andava considerata attentamente, delimitandola «con chiarezza e fermezza ai momenti necessari». Di GS scriveva che mostrava «molti aspetti positivi e incisivi»; era movimento che andava «vigilato, sì, ma [...] sorretto, incoraggiato, guidato, aiutato». Entrambi i movimenti erano per lui da coordinare con l'AC: gli assistenti dell'uno e dell'altro dovevano dipendere dall'assistente della GIAC (ADM, ASAM, 166N, 1804).

<sup>197</sup> Si veda la lettera spedita a mons. Vittorio Maietta, vescovo di Nicastro, spedita dal Vaticano il 1° novembre 1963 (ADM, ASAM, 166N, 1804). Il vescovo di Nicastro aveva già espresso un giudizio molto positivo circa l'aiuto offerto dai giessini ad alcune parrocchie della sua diocesi, congratulandosi con il metodo di Giussani che aveva «saputo educare dei giovani così meravigliosi» (ADM, ASAM, 208N, 1, lettera a Padovani del 20 settembre 1962).

notazione non è secondaria, perché nei primi mesi del '63 la sua corrispondenza presenta accenti forti, che fanno emergere considerazioni negative, e proprio per questo addolorate, su porzioni dell'associazionismo cattolico che, come la FUCI, gli erano particolarmente care e che, mentre denunciavano la difficoltà di collaborare con gli studenti provenienti da GS, si mettevano in luce con opinioni e comportamenti biasimati da Montini<sup>198</sup>.

Il risultato del nuovo giro di consultazioni sui due movimenti approdava al lasciassare, sia pure non ufficiale, accordato a GL per l'attività nella città di Milano, alla nomina di Olgiati ad assistente del movimento lavoratori e a una nota di Oldani nella «Rivista diocesana milanese», che proibiva la coeducazione nelle parrocchie e in AC, ammettendola però come valida e necessaria nei movimenti d'ambiente. Ciò significava non bloccare il proselitismo di GL e, soprattutto, consentiva a GS di svilupparsi, e non solo a Milano<sup>199</sup>, diffondendosi in molte città come «movimento [...] dipendente» dagli «uffici diocesani di Azione Cattolica»<sup>200</sup>. Si trattava – notava un ex-giessino impegnato nella GIAC nazionale – di un atto di «longanimità» che permetteva la continuità dell'esperimento<sup>201</sup>, a differenza di altri tentativi che, non rientrando negli schemi pastorali ordinari e suscitando forti perplessità nell'arcivescovo, erano stati scoraggiati. A ciò si era arrivati nonostante le ostilità che incombevano sul destino di GS e sebbene lo stesso arcivescovo continuasse a ritenere necessaria la precisazione di alcuni elementi non secondari della metodologia

<sup>198</sup> Si veda la lettera di Montini a Barbareschi del 2 febbraio 1963 (ADM, ASAM, 123, 499). In essa il cardinale esprimeva il proprio disappunto per il contegno tenuto dai fucini nei confronti di una pubblicazione di Einaudi dedicata ai *Canti della nuova resistenza spagnola*, contegno che seguiva alcune prese di posizione le quali denunciavano – sosteneva Manfredini in una lettera del 30 gennaio precedente – una preoccupante contaminazione laicista. «Il fatto – scriveva Montini – viene dopo altri del genere, che mi fanno pensare ad un orientamento ideologico e pratico fuori strada. Non posso riconoscere la Fuci in simili atteggiamenti, nei quali si rispecchia invece uno strano conformismo alle più scoperte manovre politiche e dottrinali di irriducibili nemici di Dio e della Chiesa. Come mai? come mai? Cotesta è testimonianza? cotesta è milizia cattolica? cotesta è franchezza fucina? Bisogna che ne parliamo, anche per dare conforto a un dispiacere che l'amore rende acuto». Dei dubbi di Montini sulla «sottomissione alla Chiesa» dei fucini parlava anche il presidente della FUCI Fabrizio Onida in una lettera dell'11 febbraio 1963 (ADM, ASAM, 104, 54). Si deve ricordare che, all'inizio del '63, l'arcivescovo, come presidente dell'Istituto Giuseppe Toniolo di studi superiori, aveva emanato alcune norme relative alle funzioni degli assistenti ecclesiastici che operavano in Università Cattolica, con lo scopo di bloccare i tentativi di autonomia degli studenti, un'autonomia che Onida difendeva come il criterio di fondo cui doveva ispirarsi l'Intesa universitaria (ADM, ASAM, 123, 499, lettera del 24 gennaio 1963). Per le norme emanate da Montini rimando a M. Bocci, *L'Istituto Toniolo nei suoi presidenti: dal conte Lombardo a Carlo Colombo*, in A. Carera (ed.), *Giuseppe Toniolo. L'uomo come fine. Con saggi sulla storia dell'Istituto Giuseppe Toniolo di studi superiori*, Milano, Vita e Pensiero, 2014, p. 449.

<sup>199</sup> Si veda Busani, *Dall'organizzazione al movimento*, cit., la quale ricorda che il problema della coeducazione si sarebbe ripresentato durante l'episcopato di Giovanni Colombo.

<sup>200</sup> Così si legge nella corposa relazione dattiloscritta sull'attività di GS nell'anno scolastico 1962-1963, mandata da Giussani e Padovani a Montini con lettera del 16 febbraio 1963 (ADM, ASAM, 208N, 1).

<sup>201</sup> ADM, ASAM, 104, 55, lettera di Giorgio Feliciani a Montini, del 21 febbraio 1963.

di don Giussani. Non per niente, pochi giorni prima di entrare in conclave Montini gli scriveva un'ultima lettera, con la quale inviava riconoscimenti e incoraggiamenti per GS, affrontando però un punto delicato, perché centrale nell'ispirazione pedagogica del sacerdote e perché, se mal inteso, poteva aprire il varco a deviazioni soggettivistiche collegabili alla condanna dell'«esperienza religiosa» a suo tempo comminata dalla *Pascendi* e utilizzata ora dai nemici di GS, per screditarla agli occhi della gerarchia. Era il tema dell'«esperienza cristiana come fonte della verità cristiana», di cui l'arcivescovo aveva già parlato con Giussani paventando che altri, «inesperti del metodo» e meno solidi dottrinalmente di quanto fosse l'assistente di GS, ne derivassero conseguenze da lui non volute. Occorreva dunque chiarirne il significato, riaffermando «la scala obbiettiva delle verità e dei valori». Seguiva la consueta preoccupazione per la promiscuità vigente in GS, cui si aggiungevano i timori concernenti i giessini che da qualche tempo erano in Brasile, un'impresa missionaria, questa, che a Montini sembrava «rischiosa», se non fosse stata «sufficientemente assistita e diretta»<sup>202</sup>.

Poco prima del suo distacco dalla diocesi, l'arcivescovo chiedeva dunque a Giussani di specificare meglio il cuore della sua impostazione pedagogica, ritenendo che tale passaggio fosse indispensabile a una collocazione definitiva di GS nel contesto ecclesiale. La questione non era per nulla marginale: toccava, infatti, il punto saliente del percorso di fede proposto ai giessini, che Giussani

<sup>202</sup> ADM, ASAM, 104, 55, lettera di Montini a Giussani del 16 giugno 1963. Questo il testo integrale della missiva: «Caro Don Giussani! Abbiamo sempre discorsi e commenti da fare, riconoscimenti, incoraggiamenti, benedizioni da dare; ma il tempo mi è stato, anche in queste circostanze, avaro oltre ogni dire. Ho qui un bel mucchio di documentazione su 'Gioventù Studentesca', che mi dà tante consolazioni: Ella può immaginare; e qualche trepidazione, che già Lei confidai, specialmente per ciò che altri derivano, oltre i buoni confini ch'Ella vuol mantenere, e che forse va oltre il segno delle Sue intenzioni: alludo specialmente all'esperienza cristiana come fonte della verità cristiana; come metodo pedagogico può anche andar bene, se un maestro lo guida e sa poi mettere a posto, anche nella mente dei giovani, la scala obbiettiva delle verità e dei valori; ma quel primato dell'esperienza, teorizzato come assoluto, non è ammissibile; e seguaci inesperti del metodo possono darvi espressione dottrinale inesatta. Ella sa e tutto e tutto comprende; per l'amore che porta all'opera Sua e più per quello che ha così forte nel cuore per nostro Signore, sia bravo e vigilante! Così per quella benedetta promiscuità di azione fra ragazzi e ragazze, lo so che Ella è esigente e finemente educato; ma è facile che in altri centri, imitatori del metodo, si decada nella applicazione e si venga teorizzando di coeducazione, con tante pericolose e deplorevoli flessioni. Anche qui, vigilare! non consenta che siano attribuite a 'G.S.' e a Lei interpretazioni estensive non approvabili. E il viaggio in Brasile? da parte mia, nulla in contrario: si voglia intendere con chi tratta queste cose qui in Curia. Ma anche a questo riguardo dica paterni e responsabili i miei timori, non angusti e incomprensivi: non è impresa troppo rischiosa? è sufficientemente assistita e diretta? i Vescovi locali ne fanno garanzia e vi accordano approvazione? Spero di vederLa presto, e non già per continuare la predica, ma per dirLe la mia fiducia e la mia affezione e per darLe la mia benedizione». Montini parlava di viaggio in Brasile perché Giussani gli aveva chiesto il permesso di recarvi qualche giorno, sentendo «doveroso controllare la situazione logistica ed economica, oltre che quella spirituale» degli ex-giessini che si stavano inserendo nella Chiesa di Belo Horizonte (lettera a Montini del 14 giugno 1963).



aveva iniziato ad assimilare alla scuola di Venegono, per poi riproporlo e svilupparlo come la via normale «di un effettivo itinerario spirituale personale», senza il quale gli pareva impossibile «pretendere di collaborare a edificare la chiesa»<sup>203</sup>. Peraltro si trattava di una sottolineatura non estranea alla sensibilità conciliare<sup>204</sup>. Lo stesso Montini, del resto, pur condannando «il soggettivismo religioso» moderno, sin dai tempi della FUCI aveva preso le distanze da «un oggettivismo religioso formale, asettico ed intellettualistico», avendo colto «un assunto fondamentale della controversia modernista», vale a dire il problema della «posizione del soggetto di fronte alla religione»<sup>205</sup>. Divenuto papa, nell'enciclica programmatica *Ecclesiam suam*, dell'anno successivo, avrebbe avvalorato la connessione fra esperienza personale e comunità ecclesiale, una connessione su cui Giussani stava insistendo<sup>206</sup>. Paradossalmente, dunque, è proprio da questo angolo visuale che si può notare un altro motivo di prossimità tra la Chiesa di Montini, realtà comunitaria e mistico-sacramentale che si svela nella liturgia, e l'esperienza di fede proposta da Giussani agli studenti di GS. In sostanza l'arcivescovo, che da tempo aveva avanzato una serie di precisazioni volte «a riservare all'oggettività e alla trascendenza del cristianesimo l'uso legittimo dell'espressione "esperienza"»<sup>207</sup>, ora chiedeva a Giussani di fare altrettanto. Un invito, questo, accolto dal sacerdote, che nell'estate del '63 preparò un opuscolo dedicato appunto a *L'esperienza* e lo mandò a Figini, censore ecclesiastico della diocesi, il quale lo approvò senza apportarvi modifiche<sup>208</sup>.

Gli interrogativi di Montini sulla GS di don Giussani e l'interesse con cui ne seguì l'evoluzione dicono molto del suo modo di essere vescovo. Anzitutto rivelano alcuni tratti specifici delle relazioni che, come «pastore-padre» della diocesi<sup>209</sup>, egli intrattenne con i suoi sacerdoti, relazioni che, nel caso dell'assistente di Gioventù Studentesca, volevano far fruttare l'apertura di credito a lui riservata. La questione di GS, poi, si connetteva al difficile equilibrio fra tradizione e rinnovamento cui, più volte, è stato ricondotto il magistero di

<sup>203</sup> L. Giussani, *Introduzione* all'edizione del 1977 di *Tracce d'esperienza cristiana*, Milano, Jaca Book.

<sup>204</sup> Si veda Bocci, «*La Chiesa in quanto tale*», cit., pp. 213-216, cui si rimanda per la concezione di «esperienza» sviluppata da Giussani.

<sup>205</sup> Marcocchi, *G.B. Montini. Scritti fucini*, cit., p. 23.

<sup>206</sup> Paolo VI, *Ecclesiam suam*, n. 39: «Il mistero della Chiesa non è semplice oggetto di conoscenza teologica, dev'essere un fatto vissuto, in cui ancora prima d'una sua chiara nozione l'anima fedele può avere quasi connaturata esperienza; e la comunità dei credenti può trovare l'intima certezza della sua partecipazione al Corpo Mistico di Cristo, quando si avveda che a iniziarla, a generarla, a istruirla, a santificarla, a dirigerla provvede, per divina istituzione, il ministero della Gerarchia ecclesiastica».

<sup>207</sup> Moretto, «*Quel tanto di discussione filosofica, di cui l'anima modera ha bisogno, per ritornare religiosa*», cit., p. 743.

<sup>208</sup> Cfr. Savorana, *Vita di don Giussani*, cit., pp. 300-301, e Camisasca, *Comunione e Liberazione*, cit., pp. 257-258.

<sup>209</sup> Adornato, *Nuove piste di ricerca*, cit., p. 111.

Montini. Ne risentiva la sua cura per il fermento giessino in fase di lievitazione, una cura che conferma un arcivescovo, al tempo stesso, consapevole del proprio ruolo di responsabilità e valorizzatore non del nuovo in quanto tale, ma di ciò in cui scorgeva un tentativo, per quanto perfettibile, di traduzione convincente e adeguata alle esigenze dei tempi di quelle stratificazioni dottrinali che per lui rimanevano intramontabili<sup>210</sup>. I binari dettati dalla tradizione dovevano però restare solidi e non scalfiti dalla temperie del momento, quale che fosse il grado di fascinazione esercitato dai molti volti del moderno presso frazioni più o meno ampie del mondo cattolico.

Il significato dell'attenzione riservata a Gioventù Studentesca, peraltro, si capisce ancor meglio alla luce dei rapporti che Montini intrattenne con gli altri fermenti presenti in diocesi e sui quali dovette esprimersi, si trattasse di piccoli gruppi, associazioni o movimenti allo stato ancora embrionale, che lo videro reagire diversamente, a seconda del rispetto che vi scorgeva per i criteri che guidavano il suo discernimento, vale a dire la solidità dottrinale e morale, la piena ecclesialità, il rispetto dell'autorità, la disponibilità alla collaborazione con le strutture diocesane, l'effettiva vitalità e la rispondenza alle esigenze spirituali dei tempi. E tuttavia il caso di GS era peculiare, perché presentava, in aggiunta, un elemento che la rendeva particolarmente interessante per Montini, vale a dire l'esser nata in seno all'Azione Cattolica e il concepirsi, nei suoi primi anni di vita, come fenomeno collegato all'associazionismo tradizionale. Con l'AC, del resto, GS aveva in comune non solo il legame genetico che ne faceva, per volontà dell'arcivescovo, l'espressione della Chiesa nelle scuole medie superiori, ma anche alcuni caratteri distintivi che Montini attribuiva all'Azione Cattolica, vale a dire la nascita dal basso e la libertà dell'adesione, accompagnate da un solido senso di appartenenza ecclesiale e dal riferimento all'autorità ecclesiastica; e poi la volontà di salvaguardare la tradizione della Chiesa nel confronto con una modernità, al tempo stesso, assetata di assoluto e inaridita dai limiti secolari in cui si era auto-confinata; ancora, la mancanza di una spiritualità propria, vista l'identificazione con la «comune appartenenza alla Chiesa una, santa, cattolica, apostolica», nonché la rinuncia a devozioni particolari per il privilegio accordato alla liturgia<sup>211</sup>. Tutte queste caratteristiche, peculiari all'AC di Montini, erano riscontrabili anche nella GS di Giussani, la quale, però, vi aggiungeva la progressiva puntualizzazione di un «metodo» pedagogico specifico che si segnalava per forti tratti di novità i quali, non per

<sup>210</sup> Adornato sostiene che la chiave di lettura dell'episcopato era «l'acuta consapevolezza del vescovo del proprio ruolo e dei propri doveri di responsabilità nella Chiesa e insieme della ferma volontà di perseverare nella fatica di leggere, interpretare e rispondere agli stimoli dell'attualità, non appiattiti sull'effimera apparenza di "novità" ma vissuti nella molteplice dimensione di "segni" di Dio nella storia»: *L'arcivescovo Montini. Nuove prospettive di ricerca*, in Vaccaro (ed.), *Il cristiano laico. L'eredità dell'arcivescovo Montini*, cit., p. 50.

<sup>211</sup> V. Soncini, «Pensare ed amare cattolicamente». *L'Azione Cattolica nei discorsi dell'arcivescovo Montini*, in *ibid.*, pp. 117-118.

niente, sono stati sottolineati dai testimoni che vi hanno aderito<sup>212</sup>. La peculiare combinazione fra ancoraggio al passato e apertura all'inedito contribuisce a spiegare l'intensità del coinvolgimento di Montini, un pastore – ha ricordato Manfredini – illuminato e lungimirante, che «non ha mai spento iniziativa che desse speranza di sviluppi futuri»<sup>213</sup>. Montini – ha notato Giorgio Rumi – «prendevo dalla storia quello che poteva fruttificare, ma per fare cose nuove [...], non era un regnante, era più un docente, un ricercatore, uno sperimentatore, uno scienziato che procedeva per tentativi, ma che era strettamente ancorato alla fede, alle certezze. Anzi, procedeva di certezza in certezza, da tesoro acquisito a tesoro da costruire»<sup>214</sup>. In effetti questa attitudine, che nasceva non dal venire meno delle convinzioni ereditate dal passato ma dalla persuasione che queste ultime avessero ancora molto da dire alla contemporaneità, è percepibile nell'approccio di Montini ai fermenti della Chiesa milanese: l'arcivescovo li valutava, appunto, in base alla capacità che avevano di far vibrare il tesoro del passato nel cuore dell'uomo contemporaneo, senza sbandamenti né dalla parte di un tradizionalismo incapace di risvegliare il senso religioso di chi era immerso nel mondo, né da quella di un progressismo che, per ansia di cogliere ciò che nel moderno è da valorizzare, rischiava di mettere in secondo piano il contenuto più specifico dell'annuncio evangelico. L'arcivescovo, insomma, ricercava negli esperimenti che doveva esaminare gli echi dei punti di riferimento che lo guidavano nel governo della diocesi, a volte trovandoli o magari intravedendoli, a volte, invece, riscontrando tratti che lo costringevano ad assumere atteggiamenti censori, nei quali, peraltro, si riconosceva a fatica. Anche su questo fronte, insomma, Montini cercava l'equilibrio, equilibrio nel giudicare ed equilibrio in chi doveva ricevere il giudizio. La speranza era quella di trovarsi alle prese con tentativi che la sua autorevole paternità avrebbe potuto confermare, una speranza non sempre realizzata, che però denota lo stato d'animo del pastore vigile e, al tempo stesso, premuroso per la sorte del suo gregge.

<sup>212</sup> Savorana, *Via di don Giussani*, cit., pp. 235 ss., che parla dell'«imporsi di un metodo» nuovo.

<sup>213</sup> E. Manfredini, *Le scelte pastorali dell'arcivescovo Montini*, in *Giovanni Battista Montini arcivescovo di Milano e il Concilio Ecumenico Vaticano II. Preparazione e primo periodo, Colloquio internazionale di studio, Milano, 23-25 settembre 1983*, Roma-Brescia, Studium-Istituto Paolo VI, 1985, p. 152.

<sup>214</sup> Rumi, *La Missione di Milano*, cit., p. 174.



# Juvenile Justice Measures in Italy: the creation and development of Communities for Minors

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**ABSTRACT:** Communities for minors were spread in Italy by the New Code of Criminal Procedure for Minors (Decree September 22, 1988) and by the subsequent Legislative decree (July 28, 1989). They were established across the country, with many differences at a local level, as branches experimented with different approaches and strategies, all with a view to improve their effectiveness. They were characterized by a comfortable and reassuring pattern of internal relationships, sufficiently open to encourage and support the autonomy of the minors, the strengthening of their social skills and their working abilities, and also to promote their re-integration into society. The article aims to show how the juvenile penal system changed in the 20<sup>th</sup> century: from a previous system involving institutionalized treatment, linked to the principles of isolation and depersonalization, to the development of services based on the education, protection and promotion of the individual. It then reconstructs stages in the development of the institutions of Communities for Minors, with particular reference to the community of Bologna and Reggio Calabria, reconstructing their operations in the treatment of juvenile deviance and setting them in their social and political context both local and national. The article tries to deal with the complexity of the subject through a methodology which involves operating at several different levels: the scientific literature, the analysis of the national laws on the management and re-education of deviant minors and the documents produced by the Department of Justice for Minors.

**EET/TEE KEYWORDS:** Young offenders; Reform of juvenal penal system; Culture of rights; Communities for Minors; XX<sup>th</sup> Century.

### 1. *The juvenile delinquency between institutionalization and culture of rights*

The history of Communities, introduced by Decree on September 22, 1988, the New Code of Criminal Procedure for Minors, and the subsequent Legislative decree of the 28 July 1989 n. 272, *Norms of implementation, coordination and transitional provisions*, constitutes a paradigmatic ground that allows us not only to reflect on the combination of the «minor and criminal path», but also to reconstruct the significant stages in the development and evolution of the juvenile justice system in Italy in the twentieth century: from a previous system involving institutionalized treatment, linked to the principles of isolation and depersonalization, to the development of services based on the education, protection and promotion of the individual.

In centuries and decades gone by, the realities and experiences directed to minors did not lead to the issues at hand being addressed and the users in question were guided by the principles of segregation and correction, which was wholly contradictory to the real purpose of educating the minor by encouraging the promotion of individual responsibility. It is shown, for example, not only by the correction houses' dramatic pinnacle of growth in Italy<sup>1</sup>, but also by the manner in which the detention of minors in places of internment were managed up until the first half of the twentieth century. The institutions were characterized as a place where people were marginalized and dismissed from society as a security measure and as a way to control them. Entry to the institution was compulsory and all aspects of the inmates lives were controlled by a single authoritative figure; the educator overseer<sup>2</sup>. The individual went through a process of depersonalization and alienation<sup>3</sup>. Indeed the institution for minors were put on trial since the birth of the *Century of the Child*<sup>4</sup> by lawyers, scientists, philanthropists, feminists: there was the belief that the correctional institutions produced disastrous results in their correction of young offenders; and the houses' apparent inherent limitations were especially criticized. For this reason, with a significant play on words, they were named by many as «Institutes of corruption» instead of «Institutes of correction»<sup>5</sup>.

The influence of these views is also expressed in some forms of experimentation in the field of penal interventions, such as the establishment of institutions for

<sup>1</sup> R. Raimondo, *Discoli incorreggibili. Indagine storico-educativa sulle origini delle case di correzione in Italia e in Inghilterra*, Milano, FrancoAngeli, 2014.

<sup>2</sup> A. Tibollo, *La comunità per minori. Un modello pedagogico*, Milano, FrancoAngeli, 2015.

<sup>3</sup> S. Miragoli, V. Acquistapace, *Oltre l'istituto: i criteri di qualità dei centri residenziali socio-educativi per minori*, «Maltrattamento e abuso all'infanzia», vol. 10, n. 1, 2008, pp. 29-44.

<sup>4</sup> E. Key, *Barbets aarhundrede*, Stockholm, Albert Bonniers Förlag, 1900; It. trans. *Il secolo dei fanciulli*, Torino, Bocca, 1906.

<sup>5</sup> B. Montesi, *Questo figlio a chi lo do? Minori, famiglie, istituzioni (1865-1914)*, Milano, FrancoAngeli, 2000.

minors subject to conditional sentence (Patronage for minors), in order to create pilot projects to promote the notion of institutions taking charge, especially in terms of «prevention». In Italy the first of these institutions was founded in Rome May 10, 1906, thanks to the contribution of the Italian-Scottish feminist Lucy Bartlett, following the example United States' experimental model, which had been running since 1876<sup>6</sup>. The contribution of Lucy Bartlett led the Minister of Justice and Religious Affairs, Vittorio Emanuele Orlando, to give her, in 1908 a role in the Commission for the study of the delinquency in minors<sup>7</sup>, as well as a position on in the creation of the first code for juvenile delinquency and the subsequent establishment of the juvenile court. The commission relied on the presence of another woman, Ersilia Bronzini Majno, and other well-known members of the Italian judiciary and philanthropic world, who were actively engaged in favour of the problems relating to minor offenders, including Alessandro Doria, Enrico Ferri and Scipio Sighele. The «code» – the results of the work of the subcommittees – had some significant elements which were enhanced and strengthened further by a context of general interest in children's rights; the underlying principle was represented by the axiom «to prevent rather than suppress; to educate and rehabilitate rather than punish»<sup>8</sup>.

<sup>6</sup> The probation system is considered one of the most innovative institutions created to deal with the question of juvenile delinquency because it is strongly oriented towards balancing the need to punish a person who has committed a crime with reintegrating him into society through re-educative interventions. The system forced the prisoner to fulfil certain requirements which were designed to promote their social reintegration, which was supervised by inspection staff working with the minors under probation. Thus it was important to avoid subjecting the young offenders to a formal system, placing them under «probation» for a specified time during which they were obliged to behave in a socially acceptable manner, in particular following the rules laid down by the court concerning their direction in life in terms of schooling or work, for example. Furthermore, if their family could not guarantee their honesty and good conduct, minors were supported by a probation officer figure, who acted as a guide and source of support, as well as setting out the objectives to be achieved at this time. On the other hand, should the «test» produce favorable results, the judge could declare additional checks on the guilty minor unnecessary; if the results were unfavourable, he was forced to take further punitive measures, including placement of the minor in correctional institutions. C. Bartolini, *La messa alla prova del minore*, Padova, Egeo Edizioni, 2011. M.G. Basco, S. De Gennaro, *La messa alla prova nel processo penale minorile*, Torino, Giappichelli, 1997.

<sup>7</sup> The commission was divided into three sub-committees who worked for three years, from 1909 to 1912, building upon the scientific debates and professional experiences, gathering information from the associations, local governments and volunteers. The first sub-committee analyzed the conditions of urban and rural populations and the means by which they could prevent or stop juvenile delinquency (via schools, institutions responsible for hospitalization and care and organizations offering patronage). The second sub-committee sought to deal with the question of legitimate and illegitimate filiation; and, finally, the third sub-committee furthered the study of welfare measures in favour of abandoned children, problems arising from the sacred nature of the patria potestas and the discussion of different procedures within the penal system for minors. *La commissione per la delinquenza minorile*, 1909, pp. 61-66.

<sup>8</sup> Montesi, *Questo figlio a chi lo do? Minori, famiglie, istituzioni (1865-1914)*, cit., pp. 168-176.

The considerable transformation that took place in Italy in the field of juvenile criminal law continued to be extremely relevant in the course of the twentieth century. A significant milestone was marked by the introduction of the Juvenile Court, regulated by the decree July 20, 1934, n. 1404, and its subsequent amendments, which enshrined the distinction of legislative action aimed for the treatment of minors<sup>9</sup>; although, as is supported by multiple sources reported, the first sign of change in the treatment of deviance, which until then had been characterized by the use of punishment and correction<sup>10</sup>, came in 1956, with the laws of 25 July 1956 n. 88 and 27 December 1956 n. 1441<sup>11</sup>. At that time

It began to fall apart, at least in principle, the nineteenth-century conception of an intervention aimed primarily at correctional treatment of minors to welcome the results of research and studies in the field of human sciences, and especially sociology and psychology, had meanwhile highlighted the connection between social environment and deviant behavior<sup>12</sup>.

The real breakthrough came, however, in the 60s and 70s of the twentieth century, during which the «total institutions» were strongly and vigorously accused of wrongdoing and this denouement soon spread to the institutions for misfits and minor deviants. In fact the conditions of the facilities that welcomed minors were so negative that a description of institutions for adults<sup>13</sup> can also be applied to those for minors:

In the vast majority of institutions there is no real rehabilitation treatment [...]. Instead of the individualized treatment that the misfits need, they apply in its place a mass treatment that humiliates the individual, isolating him from society and, accordingly, it compels him to be antisocial<sup>14</sup>.

It became evident that there was an enormous contradiction within the institutions responsible for carrying out the re-educational intervention in segregated and impersonal spaces, rendering any prospect of promotion and development futile. The studies of Erving Goffman, for example, report on the

<sup>9</sup> D. Izzo, A. Mannucci, M.R. Mancaniello, *Manuale di pedagogia della marginalità e della devianza*, Pisa, Edizioni ETS, 2003, pp. 183-210. The Juvenile Court has been characterized by the prevalence of criminal and repressive purposes, in accordance with the needs expressed by the fascist regime, in force in those years.

<sup>10</sup> L. Milani, *Devianza minorile. Interazione fra giustizia e problematiche educative*, Milano, Vita e pensiero, 1995, pp. 179-182.

<sup>11</sup> These two laws went to substantially change the law n. 1404 of 1934 which established the Juvenile Court.

<sup>12</sup> P. Barone, *Pedagogia della marginalità e della devianza*, Milano, Guerini, 2001, p. 81.

<sup>13</sup> L. Pati, *L'educazione nella comunità locale. Strutture educative per minori in condizione di disagio esistenziale*, Brescia, Editrice La Scuola, 1990, pp. 170-174; B. Guidetti Serra, F. Santanera, *Il paese dei celestini. Istituti di assistenza sotto processo*, Torino, Einaudi, 1973.

<sup>14</sup> G. Senzani, *L'esclusione anticipata. Rapporto da 118 case di rieducazione per minorenni*, Milano, Jaka Book, 1970, p. 463.



highly impersonal aspects of places of imprisonment: the custody and correction houses, the work establishments and the pious institutions, both governmental and private, appeared to be the expression of a concentrated universe, completely isolated from the outside world, highly ritualized and rich in symbolic value, realised within the impenetrable confines of a formally administered regime<sup>15</sup>. The work and contributions of Franco Basaglia, the Italian psychiatrist and neurologist, were also very influential: in 1968, Basaglia published his dossier, *The denied institution*. This book became known internationally thanks to his work in a psychiatric hospital in Gorizia, which turned into a successful experiment within the therapeutic community in its reassessment of the role of the mentally ill, leading to the eventual implementation of a more humane approach to support. Basaglia inspired the Law of 13 May 1978, n. 180, *Findings and obligatory health treatment*<sup>16</sup>, which radically reformed Italian psychiatric hospitals, establishing the closure of «total institutions»<sup>16</sup>. The psychologist and psychoanalyst of German origin, Erik Homburger Erikson, fought in support of the thesis dealing with de-institutionalization, creating his own interpretative model which strongly focused on psychological aspects. His work *Identity: Youth and Crisis* (1968) emphasizes the importance of social and cultural factors: each individual can develop in a structured and coherent way in terms of personality only if they are fully recognized by social groups. The institutionalized subjects, especially minors, are at risk of assuming an identity that portrays them as different from the rest of the group and so they are destined to be doomed socially<sup>17</sup>.

This new awareness led to the irreversible loss of entire institutions and the start of a process of de-institutionalization which definitively established the end of the disciplinary and correctional treatment of minors, setting in motion the finding of alternatives and different solutions to past measures which had previously led to physical and psychological deprivation. On a legislative level, the new rules regulated the treatment of juvenile offenders and contributed decisively to the creation of new specialized institutions: or, more precisely, the characteristics of the former institutions, marked by rigid time structures and impersonal spaces, wholly isolated from the outside world in terms of both the urban context in which they were placed and the minors' familial background, changed into new institutions which offered educational services with the specific function of re-education<sup>18</sup>. These institutions paid particular attention to social

<sup>15</sup> E. Goffman, *Asylums. Essays on the social situation of mental patients and other inmates*, New York, Anchor Book, 1961; It. trans. *Asylums. Le istituzioni totali: i meccanismi dell'esclusione e della violenza*, Torino, Einaudi, 2003.

<sup>16</sup> V. Babini, *Liberi tutti. Manicomi e psichiatri in Italia: una storia del Novecento*, Bologna, il Mulino, 2009.

<sup>17</sup> E.H. Erickson, *I cicli della vita. Continuità e mutamenti*, Roma, Armando, 1984; Id., *Infanzia e società*, Roma, Armando, 1966.

<sup>18</sup> C. Girelli, M. Achille, *Da istituto per minori a comunità educative. Un percorso pedagogico*

context, associations with the region and educational agencies; in contrast to the formerly huge and dispersed nature of the institutions, the new structures afforded *houses* and where possible provided individual spaces that met the needs of individual children so that they could develop a sense of belonging. In this sense the first trials based on the new standards can be traced back to the notion of «focolarini», which became popular from the 1950s onwards. They welcomed minors subject to criminal proceedings, with some projects related to Ministry of Justice; they consisted of small groups of adolescents (10-12) with the presence of adults in educational roles, who were not simply guarantors of discipline<sup>19</sup>. It is important to remember that at that time «apartment groups» were created in Emilia Romagna<sup>20</sup>.

## 2. *Juvenile Justice Measures in Italy: the communities*

As previously discussed, the establishment of communities for minors in Italy was part of a climate of strong renewal in terms of the development of institutions devoted to the psycho-social treatment of disadvantaged people, newly orientated towards the promotion and development of the person. Valerio Ducci observed more factors of change in the foundation of communities: the economic and social planning developed in the 70s which promoted the centrality of the State in the social sphere; the debate over special adoption (1967), the advent of regions with ordinary statutes, and the consequent social policy reform. The work of some juvenile judges (Gian Paolo Meucci, Battistacci Giorgio and Alfredo Carlo Moro) promoted greater awareness of the rights and fundamental needs of young people<sup>21</sup>. We can add to this the considerable influence exerted by certain guidelines laid down by international law, for example the *Minimum Standard Rules for the Administration of Juvenile Justice* issued by the Sixth Congress of ONU in 1985, known as the Beijing Rules, and the recommendation drawn up by the Europe European Council (Strasbourg, 17 September 1987).

A greater emphasis on the role of community intervention for children at risk was granted by the Law of 4 March 1983, n. 184 «Discipline of the adoption and foster of children», where we can find the first explicit reference

*di deistituzionalizzazione*, Trento, Erickson, 2000.

<sup>19</sup> M.R. Rossi, *Il dibattito sull'istituzionalizzazione dei minori e la nascita delle prime comunità negli anni Settanta*, in G. Macario (ed.), *Quaderni: educare in comunità. Comunità per minori e progetto educativo*, Firenze, Edizioni della giunta regionale Toscana, 1992, p. 19.

<sup>20</sup> M.C. Bonini, *Diventare uguali: i minori dall'istituto ai gruppi-appartamento*, Roma, Coines, 1976.

<sup>21</sup> G. Barbanotti, P. Iacobino, *Comunità per minori. Pratiche educative e valutazione degli interventi*, Roma, Carocci, 1998, p. 17.

to community, even though a full definition is not provided. Article 2 of the law provides «placement in family-type community characterized by the organization and interpersonal relationships similar to those of a family» if the minor has not had the opportunity to be raised by their own family or fostered. This law emphasized that it was necessary to protect children's growth through placing them in a protective and reassuring environment and that this obligation continued even if the minor had committed a crime: the action therefore had to be based on the principles of rehabilitation and re-education as an interest and duty of the State<sup>22</sup>.

Furthermore, the application of the Decree of September 22, 1988, n. 448, and the subsequent decree of 28 July 1989 n. 272, *Norms of implementation, coordination and transitional provisions*, demand a more complete structure of the juvenile justice services by the allocation of relevant skills for the protection of minors through a legal procedure. The Italian juvenile justice system concerns boys and girls aged from 14 to 18 years who have committed offences of the civil or penal code. It is impossible to criminally charge a person aged less than 14 years. It is possible, though, to charge a youth aged from 14 to 18 years, providing that the person is not mentally ill, which has to be assessed case by case. Juvenile offenders cannot be sentenced to life imprisonment: this was a law created by the Italian Constitutional Court (Sentence n. 168/1994) which encompassed Art. 31 of the Italian Constitution, providing special protection measures for childhood and youth. Sentences are served in juvenile justice institutions until 21 years of age, and cognizance of Juvenile Court remains until 25 years of age<sup>23</sup>. The legislation provides the following precautionary measures against minors: «prescriptions» (art. 20), through which the court determines that the minor receive specific education and undertake training activities, «house arrest» (art. 21) sometimes with flexible restrictions, allowing movement from home to school (or other educational related activities) and «detention» (art. 23) where the minor was to be placed in a Juvenile Prison [Istituto Penale Minorile, IPM]. This measure was for offences with punishments exceeding 9 years and was to be justified for the risk of tampering with evidence, absconding, or repeating the offence. In the IPM there are minors subject to criminal measures, and also young adults who committed a crime when they were minors and – according to Italian law – may stay in juvenile prison until 21 years of age. The IPMs in Italy totaled 16, and were located in most Italian regions<sup>24</sup>. There were also alternative measures that could be decided by the Judge, for example probation.

<sup>22</sup> L. Milani, *Devianza minorile. Interazione tra giustizia e problematiche educative*, Milano, Vita e pensiero, 1995, p. 193.

<sup>23</sup> P. Meringolo, *Juvenile Justice System in Italy: Researches and interventions*, «Universitas Psychologica», vol. 11, n. 4, 2012, p. 1082.

<sup>24</sup> *Ibid.*, pp. 1082-1083.

The main purpose, so far as possible, is to avoid detention and use alternatives measures and strategies for social inclusion (Art. 1, and Art. 21 and 22). To protect minors' psychological and educational development, institutions must firstly focus upon the personality assessment (Art. 8 and 9) to better plan activities and to try to prevent minors' labeling risks. They must devise suitable treatments and avoid information about an individual's deviant behavior being disclosed (Art. 13, 14 and 15) – and ensure they protect closest social relationships, if existing and reliable, and increase their formal and informal social networks<sup>25</sup>.

The New Code of Criminal Procedure for Minors (1988) expressly refers to the «interest of the child», the «educational needs» and the «protection of children»; it also adopts the principle of «minimum offensiveness» as legal criteria to guide and influence the decisions and choices throughout the process regarding the child. These principles are strengthened by the accompaniment and support of minors and their families by social, local and ministerial services throughout the duration of the procedure in order to introduce the necessary tools to promote the first opportunity for exit from the criminal justice system. Thus there is a clear shift from the simple punitive treatment against the young deviant to the preparation of measures that could help to re-educate them, entrusting them «to the community to which they belong, in order that it welcome them and give an effective response to their right of education and social integration»<sup>26</sup>.

The important changes implemented within the juvenile justice system led to a greater involvement of local authorities as a set of individuals and institutions that had a duty to intervene in the prevention and treatment of deviance through the reintegration and socialization of minors. The code plays a fundamental role in the passage which article n. 9 defines as an «investigation about the personality of the minor», which becomes an obligation for judges to take heed of. Personality is the result of complex and educational actions; it is the outcome of a process in which the subjective and the cultural dimension become two important elements in the person that gradually develops<sup>27</sup>. It is a dynamic and interactive concept that illuminates the relationship between nature and culture in a complex way. Considered in these terms, the educational dimension can, in fact, be seen as an «ecological system», as a dimension that incorporates not only the family system, but all the different agencies and organizations of the region to promote the comprehensive and integral development of the individual<sup>28</sup>.

<sup>25</sup> *Ibid.*, p. 1082.

<sup>26</sup> V. Ducci, *Il processo di deistituzionalizzazione in Italia negli ultimi decenni*, «Centro Nazionale di Documentazione e Analisi per l'Infanzia e l'Adolescenza, Pianeta infanzia. Questioni e documenti. Dossier monografico: i bambini e gli adolescenti fuori dalla famiglia. Indagine sulle strutture residenziali educativo-assistenziali in Italia», vol. 10, 1999, pp. 234-247.

<sup>27</sup> A. Borsani, *Istituzioni e devianza minorile. Sanzione e diritto/dovere all'educazione*, Milano, FrancoAngeli, 1997, p. 62.

<sup>28</sup> *Ibid.*, p. 63.

### 3. *The origins and educational aspects of the community*

Communities for Minors were established across the country and were characterized by a comfortable and reassuring pattern of internal relationships, sufficiently open to encourage and support the autonomy of the minors, the strengthening of their social skills and their working abilities, and also to promote their re-integration into society. The opening of these institutions marks the start of increasingly pedagogical interventions, specifically an educational process aimed at rehabilitation.

Italy has public communities (depending on the Juvenile Justice Administration) or private communities. These are acknowledged by Regional Authorities. They are characterized by their less constrictive approach, which contrasts with that of detention in prison. It is, in fact, a form of intervention which pays heed to the minor's personality and developmental phase, allowing them to «get away [from the community] with regards to the requirements of study or work, or other useful activities for their education» (art. 22 c.3), in order to not interrupt the educational process. This must fulfill requirements such as family organization (272/89, art. 10), including the presence of other youngsters who are not in charge of justice, no more than ten people per group and employment of professional workers. These elements together produce the necessary and fundamental conditions to enable specific projects. The project, entailing practices such as re-education, aims to help minors understand the meaning of the criminal act or conduct which led them to become a «member» of the criminal justice system, which strengthens the acquisition of the process of empowerment. In addition, there is considerable focus upon interpersonal relationships – not only upon those between peers, but also with professionals.

The organization of the community, as established by law, provided indications which were too generic, and this then conflicted with the difficult relationship between theory and practice. As is reported by scientific literature<sup>29</sup>, judges, professionals and the services had great difficulty in even understanding the new laws and extensive changes which were required and implemented: there were many differences at a local level, as branches experimented with different approaches and strategies, all with a view to improving their effectiveness. As a direct result, a diverse range of experiences in the various Italian regions developed; every community was created and developed according to the operational requirements which had been stipulated according to the regions' specific characteristics and territory. The key word here is «experimentation»: the founding of the first community structures took place gradually from the early 1990s onwards as an experiment for the various Italian regions: the first

<sup>29</sup> G. De Leo, A. Dell'Antonio, *Nuovi ambiti legislativi e di ricerca per la tutela dei minori*, Milano, Giuffrè, 1993; P. Pazè (ed.), *I minori e il carcere*, Milano, Unicopli, 1989.

public communities were strictly linked to Centers for First Reception<sup>30</sup> (Centri di prima accoglienza, C.P.A.), as for example in the case of public communities of Bologna and Reggio Calabria.

The establishment of the Bolognese public community dates back to 1992 when it was opened under the name of “community in transit” and provided residence for up to four minors for a period of up to 21 days. From 1994 onwards the community was clearly divided from the Centres for First Reception to resolve the situation of the limited acceptance of the territory by the private community, or the lack of facilities specifically offered to adolescents.

The same situation arose in Reggio Calabria: the public community was formed in 1998. Its premises was expanded and divided by the Centres for First Reception from 2000 onwards, when the community was able to incorporate locals, who were welcomed by the Office of Social Service for Minors [Ufficio di Servizio Sociale per Minorenni, U.S.S.M].

Many other projects and initiatives, in addition to those aforementioned, were set up by the Juvenile Justice Service in order to experiment in different Italian regions<sup>31</sup>. Although each case is individual in nature, they are all united in one aspect: they take into account the advantages and disadvantages of a particular judgement in order to improve their effectiveness, promoting a strong synergy and connection with other local agencies.

An analysis on the Italian community facilities reported a similar structuring of time and activities for minors. The admission process ensured a detailed analysis of the individual case so that the most appropriate support could be provided and so that the judge could be given sufficient information to decide upon the most suitable course of action: the admissions were instructed to collect data and information on minors, construct psycho-educational profiles and create individual care plans (Progetto educativo personalizzato, P.E.I.)<sup>32</sup> determined by the interests and needs of the minor and to identify suitable

<sup>30</sup> These centres detain minors for up to four days. During their stay minors are observed by a specialized team (including psychologist, educator and youth worker), that writes a first report for the Juvenile Judge. These centers could be also organized as small custodial communities with a «family» structure and an educational core. After four days, the Judge decides on the minor's penalty, based on the following criteria: non-interruption of their educational process, reduction of harm caused by the proceedings, a quick judgment process and detention as a last choice.

<sup>31</sup> M. Camonico (ed.), *Ragazzi Fuori. Adolescenti e percorso penale. Pratiche di accoglienza nelle comunità socioeducative*, Roma, Coordinamento Nazionale Comunità di Accoglienza, 2009, pp. 191-196.

<sup>32</sup> The individual care plan is the pivotal focus of the work both for and with the child; it is a model of intervention to ensure the child, in a context which reproduces the dynamics of everyday life, a path of growth based on a thorough knowledge of the history of the child, his condition and his family and social context. «For each plan it is necessary not only to imagine and identify what they want to obtain, but also to carefully observe the concrete situation from which we start». F. Olivetti Manuokian, *Le comunità, organizzazioni riabilitative che producono dilemmi*, in C. Kaneklin, A. Orsenigo (edd.), *Il lavoro di comunità. Modalità di intervento con adolescenti in difficoltà*, Roma, NIS - La Nuova Italia Scientifica, 1992, pp. 25-42.

work placements in accordance with the plan of alternating training and work, which was developed in co-operation with local agencies. For the re-educational project to be a success, furthermore, it was of fundamental importance to involve families so that the organization could find out what could be done to aid the strengthening of parenting skills.

Life in the community is generally governed by an internal regulation system, a document which is read and signed by each minor at the time of entry. The regulations delineated the minors' duties, which, along with the work of the staff, played a leading role in the organization and internal management of the setting. The activities can be divided into two main categories:

- House maintenance and management;
- Activities promoting the process of responsibility to aid re-integration into society.

Training holds an essential role and can be seen in the organizational model, which requires the constant presence of rehabilitative activities (for example, various kinds of workshops: photography, carpentry, etc.) and in the experiences derived from community life. Daily interaction with important adults (staff) and peers, as well as the direct involvement and participation of minors in daily, structured tasks, present invaluable opportunities and possibilities for change and growth. The idea of the community was to discourage deviance, encourage the development of the minors' personalities and the strengthening of their social skills through the experimentation of freedom and through equality, within a shared space and time, and through community relations (through sharing, togetherness, inclusion and proximity). These are the general objectives of all the communities that in practice are assumed, as well as has been highlighted by the research of some authors, by the strong character of "situation" or better by the construction of the project according to the needs of the individuals rather than the adoption of a pre-established plan<sup>33</sup>.

For example in the community of Bologna a shift system for cleaning is expected to be respected by every youngster during the week and a precise activity plan and educational and formative path proposed for the minors. We can mention the project started within the community sponsored by the non-profit organization «Center Social Voluntary» [Centro Volontariato Sociale] operating for over thirty years in the District San Donato in Bologna. The center offers different techniques for learning the craft of carpentry and furniture restorer through the guidance of professional craftsmen in retirement. The work is done considering the time and learning method of each minor to come to the full realization of the product. Thanks to the individualization of the activity, trainers try to convey values such as respect, dignity and work;

<sup>33</sup> S. Casciotti, F. Curti Gialdino, V. De Orsi, U. Morganti, S. Tressanti, *Comunità educative per minori: indagine conoscitiva*, «Esperienze di giustizia minorile», nn. 1-2, 1995, pp. 12-131.

furthermore, cognitive processes related to self-esteem are stimulated in every minor increasing confidence both in themselves and in personal resources.

#### 4. Data

Significant investigations can be found analyzing data from Department of Juvenile Justice. One specific aspect refers to the number of juvenile offences committed each year, noting a slight increase in 2011 and 2012, and looking at Italian juvenile offences in particular. Table 1 shows the different trends between the number of charged minors. We can see that the percentage of Italian young males who commit offences is higher than foreign minors. There is also a great difference between male youth offenders and female youth offenders who are cared for by the justice system; females commit less offences than males. Another difference shows how foreign females commit more offences than Italian females.

The following tables (Table 2 and 3) show the most recent data for 2011, 2012, 2013 and 2014. If you look at the age of the minors and their country of origin, there were no substantial changes in the last four years; the vast majority of minors, both male and female, are between 16-17 years old and they come from countries in the European Union.

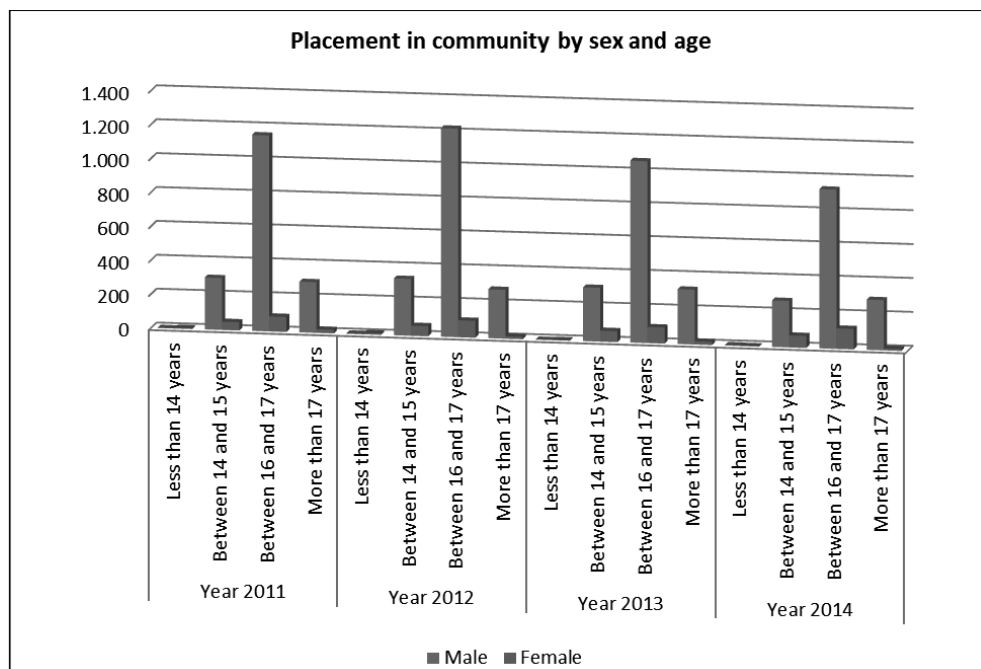
Tab. 1. Placements in the Community in the years 2005 to 2014, according to nationality and sex. National situation.

Years	Italian			Foreign			Total		
	m	f	mf	m	f	mf	m	f	mf
2005	926	42	968	801	157	958	1.727	199	1.926
2006	1.018	46	1.064	711	124	835	1.729	170	1.899
2007	1.173	46	1.219	706	130	836	1.879	176	2.055
2008	1.292	72	1.364	699	125	824	1.991	197	2.188
2009	1.358	61	1.419	609	72	681	1.967	133	2.100
2010	1.365	64	1.429	549	89	638	1.914	153	2.067
2011	1.447	86	1.533	604	93	697	2.051	179	2.230
2012	1.422	65	1.487	698	130	828	2.120	195	2.315
2013	1.287	80	1.367	681	115	796	1.968	195	2.163
2014	1.097	55	1.152	670	165	835	1.767	220	1.987

Source: Based on data from the Department of Juvenile Justice

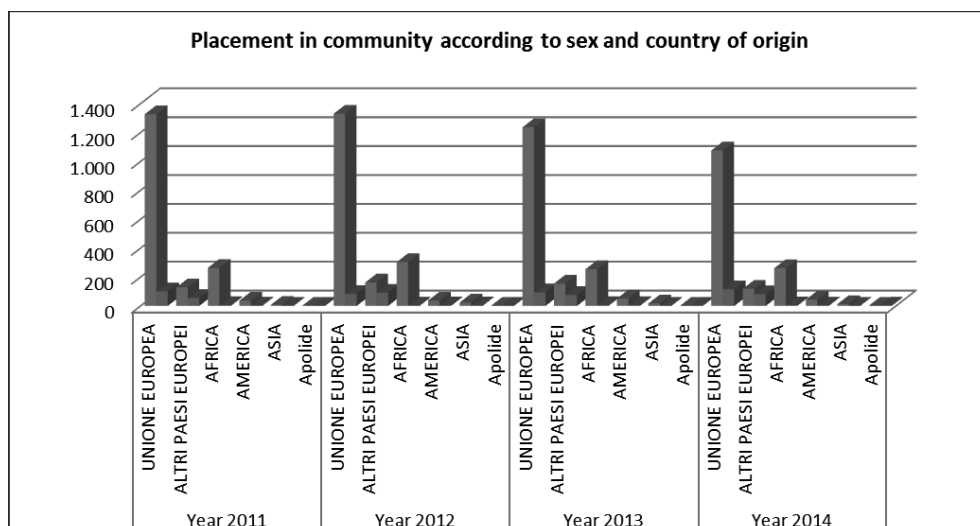


Tab. 2. Placements in the Community from 2011 to 2014, according to sex and age.



Source: Based on data from the Department of Juvenile Justice

Tab. 3. Placements in the Community from 2011 to 2014, according to sex and country of origin.



Source: Based on data from the Department of Juvenile Justice

The placement in the community, because of its educational and organizational system, is able to meld the educational needs of the minor with the limitation and control of the minor (that a criminal measure must always guarantee), avoiding the negative effects of institutionalization and can offer the minor a more suitable environment for his formation<sup>34</sup>. In fact, the placement in the community, for cases in which it is possible to consider this kind of measure, is a progressively increased response used by Judicial System: in 2013 the majority of minors, precisely 86%, are placed in such structures<sup>35</sup>. The majority of children were placed in private communities (86%) also due to the limited number of ministerial structures in the national territory: there are ten communities directly managed by the Administration of Juvenile Justice and they are mostly present in the South of Italy. The ten ministerial communities are placed in the following cities: Bologna, Caltanissetta, Catanzaro, Genoa, Lecce, Nisida, Potenza, Reggio Calabria, Santa Maria Capua Vetere, Salerno.

The history of Italian communities have additional development during the last decade of the XX century and the beginning of XXI century. The indications given by legislative order, that as we saw appeared to be too general, were built over the years by ministerial circulars with which they tried to give common guidelines to reality that they had already conformed, with particular reference to the selection of the staff and the treatment of minors, exemplified in the law n. 285 of 1997, which describes more explicitly the function of the community, thanks to the establishment of the Parliamentary Commission for Childhood and Adolescence and the National Observatory for Children, the result of a new focus to childhood as a subject of rights. It also important to remember the ministerial circulars of 16 June 2004 (Organization and technical management of the community), of 12 April 2013 (Intervention model and revision of the organization and operation of the service system of juvenile justice).

To conclude, in Italy the maturation and development of juvenile criminal legislation represents the culmination of a complex process that has unfolded throughout the twentieth century and which has determined the need to rethink functions and the mandate of traditional educational institutions that are operating in the field of juvenile delinquency, along a non-linear path and not yet fully concluded.

<sup>34</sup> P. Bastianoni, M. Baiamonte, *Il progetto educativo nelle comunità per minori. Cos'è e come si costruisce*, Trento, Edizioni Centro Studi Erickson, 2014, p. 21.

<sup>35</sup> ISTAT, *I giovani nelle strutture minorili della giustizia*, 2013.

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# El Paulo Freire más actual deshaciendo falacias educativas. Una reflexión crítica sobre los procesos de creación y transmisión del conocimiento

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*The most current Paulo Freire over fallacies in education. A critical reflection on the process of creating and knowledge transfer*

**ABSTRACT:** The paper analyses and explains the Paulo Freire's ideas on education in relationship to current problems of educational system. We stopped in the liberal conception of education in the consequences of the 'powers' as support of educational activities and the impact of new technologies applied to school learning. For this reason, we have transcended the author's own work and we have related to other reference texts that illustrate the validity of their ideas and the need to revisit the society like Freire did. This can support us for improve a new approach about the discussion on education and society. To do this, we followed an interpretative methodology textual explanation with critical focus and extensive references.

**EET/TEE KEYWORDS:** Educational skills; Educational fallacies; Educational Technologies; Critical education.

Para que el carácter de un ser humano desvele cualidades verdaderamente excepcionales, hay que tener la fortuna de poder observar su actuación durante largos años. Si dicha actuación está despojada de todo egoísmo, si la idea que la rige es de una generosidad sin par, si es absolutamente cierto que no ha buscado ninguna recompensa y que, además, ha dejado huellas visibles en el mundo, entonces nos hallamos, sin duda alguna, ante un carácter inolvidable.

Jean Giono, escritor francés autodidacta (1895-1970)<sup>1</sup>

Fue tanto lo que dijo Paulo Freire y tanto lo que se ha dicho de y sobre Paulo Freire, que resulta misión imposible exponer algo nuevo sin ser sometido al escrutinio meticuloso de sus propias palabras, al debate constante de quienes lo conocieron de primera mano y a los razonamientos de especialistas que han hurgado y desmenuzado, cual filigrana de orfebrería, su prolija, centrada y razonada obra. Dar unidad a las ideas dispersas para poner de manifiesto los enormes problemas sociales y ofrecerles una respuesta de acuerdo a las necesidades de quienes, como él, entendían oportuno un cambio estructural, fue su objetivo prioritario (a veces no del todo bien entendido). Por tanto, comenzamos este trabajo con la humildad de quienes han leído al autor y desean subrayar de él lo que apenas aparece en sus textos y debe ser comprendido entre líneas, para explicar un mundo en continuo movimiento y en permanente incertidumbre, convulso también en lo pedagógico y sin ideas para combatir los enigmas del futuro, que no son más que los problemas intencionadamente no resueltos del pasado. Para ello, nos pertercharemos de los instrumentos de análisis elaborados por este hombre «sin par», que ha dejado «huellas visibles en el mundo» y que, compartiendo otras expresiones de Jean Giono, «desvela cualidades verdaderamente excepcionales». Porque, tal y como han devenido las cuestiones relativas a la educación, al conocimiento y a la cultura a través de su afán instrumental, ordenancista, percutor y mercantil, la ausencia de su pensamiento y propuestas en los tiempos actuales ha acabado siendo más significativa y demandada que su presencia hace 20 o 30 años, para deshacer determinadas falacias que parecen tomar firme e incontestable arraigo. Detengámonos, al menos, en el análisis de tres de ellas.

### 1. *De la educación como derecho fundamental a objeto mercantil de privilegiados*

Afirmaba Paulo Freire algunos meses antes de morir, en un texto introductorio a una obra publicada en 1966, aquello de «vuelvo a insistir en que *formar*

<sup>1</sup> J. Giono, *El hombre que plantaba árboles*, Barcelona, Duomo ediciones, 2014, p. 13 (edición original, 1980).



es mucho más que simplemente *adiestrar* al educando en el desempeño de destrezas [...] De allí la crítica permanente que siempre llevo en mí a la maldad neoliberal, al cinismo de su ideología fatalista y a su rechazo inflexible al sueño y a la utopía»<sup>2</sup>. Se adelantaba, con su habitual circunspección comportamental no exenta de su vehemencia verbal, a muchos de los análisis realizados con posterioridad. Veamos por qué.

Tras la II Guerra Mundial y la consolidación del denominado Welfare State, que prolongó su etapa de desarrollo hasta 1973 – año de la primera gran crisis del modelo energético basado en el petróleo –, la educación en el llamado primer mundo parecía convertirse en derecho universal y en elemento imprescindible, tanto de naturaleza y carácter individual como social, para la acumulación económica en el creciente despegue productivo industrial. Siguiendo este imperativo, Thomas H. Marshall, destacado sociólogo británico, profesor en la London School Economics, consideró a mediados de siglo que para adquirir el nivel o status de ciudadano era imprescindible contar con los derechos civiles, políticos y sociales dentro de los cuales debía tener un lugar de privilegio la educación<sup>3</sup>. El saber, al alcance de toda la población, parecía convertirse en la llave del desarrollo en la nueva configuración mundial salida de la contienda bélica y, en este sentido, tanto los Estados democráticos como los dictatoriales, confiaron plenamente en esta fórmula de modernización y progreso.

Así es, el ejemplo que presentamos a continuación ilustra lo que acabamos de afirmar para los Estados no democráticos, pues para los democráticos sobran y son bien conocidas las referencias: Hace algo más de cincuenta años, en plena expansión de la dictadura franquista en España y cuando los organismos internacionales velaban por su desarrollo económico y educativo (esto es, por su aceptación y equiparación) con los Estados democráticos de su alrededor, se publicó un informe patrocinado por el Proyecto Regional Mediterráneo, que afirmaba – entre otros muchos aspectos – lo siguiente: «Es innegable que la educación es en sí un bien de consumo desde el punto de vista del individuo, independientemente de su consideración como factor de crecimiento. Sin embargo, en nuestras circunstancias actuales se impone una planificación educacional que tenga perfectamente en cuenta las necesidades

<sup>2</sup> Radicalizaba su afirmación en las páginas finales de esta misma obra. No nos resistimos a reproducir sus palabras: «El discurso de la globalización que habla de la ética esconde, sin embargo, que la suya es la ética del mercado y no la ética universal del ser humano, por la cual debemos luchar arduamente si optamos, en verdad, por un mundo de personas. El discurso de la globalización oculta con astucia o busca confundir en ella la reedición intensificada al máximo, aunque sea modificada, de la espeluznante maldad con que el capitalismo aparece en la Historia. El discurso ideológico de la globalización busca ocultar que ella viene robusteciendo la riqueza de unos pocos y verticalizando la pobreza y la miseria de millones. El sistema capitalista alcanza en el neoliberalismo globalizante el máximo de eficacia de su maldad intrínseca». P. Freire, *Pedagogía de la autonomía*, Madrid, Siglo XXI, 1997, pp. 16 y 122 (edición original, 1966).

<sup>3</sup> T.H. Marshall, T. Bottomore, *Ciudadanía y clase social*, Madrid, Alianza Editorial, 1998, pp. 36 y ss; 66 y ss. (edición original, 1950).

de mano de obra calificada que el desarrollo económico implica. No hay, en realidad, oposición entre este enfoque, que podríamos llamar «económico» y el enfoque puramente «cultural». La condición necesaria para el desarrollo cultural, en un sentido más amplio, es el propio desarrollo económico»<sup>4</sup>.

Es sólo una demostración, pero muy elocuente, de cómo el Ministerio y la OCDE parecían justificarse ante el nuevo reto de educar para profesionalizar, en un Estado en creciente despegue y con un modelo educativo autoritario que había destrozado el modelo educativo democrático-republicano creado constitucionalmente treinta años atrás. Una diferenciación entre educación económica y cultural que fue necesario postular en aquellos momentos por sus propios responsables porque significaba un cambio de rumbo (de «Plan» o de «planificación operacional», según sus propias palabras), que afectaba a lo social pero, también y sobre todo, a lo político, jurídico, productivo e institucional. Aquellos pretextos globalmente expuestos «cuyos frutos sólo a la vuelta de muchos años pueden cosecharse en plenitud» (*sic*) ni siquiera barruntaban la acometida neoliberal que tendría lugar a partir de la década de los años 80 con nuevas formas de dominio, desarraigo y desestructuración del modelo educativo, considerado, en el sector académico, clásico y humanista y, en el sector productivo, distributivo y nivelador.

En efecto, la llegada al poder de Margaret Thatcher en Reino Unido, el año 1979, y de Ronald Reagan en Estados Unidos, en 1980, junto a otros líderes y corporaciones europeas y latinoamericanas afines a esta modalidad de pensamiento neoconservador en lo ideológico y neoliberal en lo económico, supuso una ruptura del modelo social creado en los años 40 y 50. Sin dar tregua ni oportunidad a los debates abiertos, comienza la desregulación del sistema financiero, la bajada de impuesto a las grandes fortunas con el consiguiente recorte en el gasto público, la inhibición del Estado en los asuntos que otrora eran considerados esenciales y, quizás, lo más destacado, la desprotección en todos sus frentes de las clases sociales medias y subalternas. Afirmación de determinadas opciones religiosas tridentinas, tensiones permanentes durante el período de la Guerra Fría, conflictos bélicos y reivindicaciones laborales y económicas, luchas sociales de considerable alcance y variados motivos, hambrunas generalizadas en África y cuestionamiento de los principios democráticos básicos, tiñen el panorama político de aquellos años que, cada vez, se centra más en el individuo y en su capacidad de triunfo en el mercado, según las leyes – consideradas naturales y casi providenciales – de la oferta y la demanda<sup>5</sup>.

<sup>4</sup> Ministerio de Educación Nacional y OCDE, *Proyecto Regional Mediterráneo. Las necesidades de educación y el desarrollo económico-social de España*, Madrid, 1963, p. 14.

<sup>5</sup> «Los discursos neoliberales, llenos de ‘modernidad’, no tienen la fuerza suficiente para acabar con las clases sociales y decretar la inexistencia de intereses antagónicos entre ellas, igual que no tienen fuerza para acabar con los conflictos y la lucha entre ellas. Lo que ocurre es que la lucha es una categoría histórica. Y por eso mismo tiene historicidad. Cambia de espacio-tiempo a espacio-

También la educación comienza el rápido proceso de adaptación a esta realidad: Flexibilidad, estandarización de objetivos, promoción individual, ausencia de referente social, rendimiento de cuentas, armonización de las capacidades y los resultados, evaluación permanente, privatización, devaluación de títulos para hacer vitalicia la conquista del saber y la inestabilidad en el empleo, exigencia en la acumulación desmesurada de habilidades y destrezas, deslocalización de los problemas educativos (esto es, descontextualización de los mismos), mundialización de las exigencias escolares (basta tener como referencia los informes PISA, PIACC, Education at a Glance o Education Policy Outlook, diseñados con posterioridad y dependientes de la OCDE), desentendimiento del papel otorgado al Estado en los asuntos sociales, es decir, del sentido público de los servicios esenciales al confundir su función de regulación con el de disfuncionalidad y burocratización, búsqueda de eficacia, reformas inmediatas y resultados a corto plazo, etc. Aspectos, como se puede apreciar, relacionados con las categorías de análisis provenientes de la economía y del mundo de las grandes empresas, donde el camino a seguir se muestra a través de la rivalidad extrema o la competición sin límites para conquistar la tan ansiada excelencia – entendida como cumplimiento de los objetivos minuciosamente planificados de antemano, a miles de kilómetros de distancia del epicentro de los problemas a resolver. En síntesis, se desprotegen los derechos laborales, sanitarios, sociales, educativos... y con ellos la igualdad de oportunidades que había dado lugar a la prosperidad y estabilidad cuarenta años antes, incluso en los regímenes dictatoriales como hemos podido constatar. Las palabras premonitorias de Freire dan cuenta de la situación de control y aislamiento al que estaban sometidos los ciudadanos más vulnerables:

Lo que interesa al poder opresor es el máximo debilitamiento de los oprimidos procediendo para ello a aislarlos, creando y profundizando divisiones a través de una gama variada de métodos y procedimientos. Desde los métodos represivos de la burocracia estatal, de la cual disponen libremente, hasta las formas de acción cultural a través de las cuales manipulan a las masas populares, haciéndolas creer que las ayudan<sup>6</sup>.

A partir de entonces, el mercado se convierte en la única instancia autorreguladora y la educación pasa a ser un negocio en auge, un bien para disfrute de unos pocos y al servicio del sistema productivo y especulativo mundial: un monopolio controlado desde determinados organismos internacionales para tratar de homogeneizar propuestas y resultados. Como diría Stephen J. Ball, vislumbrando nuevos derroteros en el abordaje de los temas educativos, «estos desarrollos y cambios en la política educativa, que afectan a las formas y a las

tiempo. La lucha no niega la posibilidad de acuerdos, de arreglos entre las partes antagónicas. Los acuerdos también forman parte de la lucha». P. Freire, *Pedagogía de la esperanza*, Madrid, Siglo XXI, 2007, p. 89 (edición original, 1992).

<sup>6</sup> P. Freire, *Pedagogía del oprimido*, Madrid, Siglo XXI, 2008, p. 172 (edición original, 1970).

modalidades de la provisión y la organización educativa, han agotado el alcance actual de nuestra agenda de investigación y necesitamos adaptar y ajustar qué es lo que consideramos como problemas de investigación para ponernos al día. Necesitamos plantear preguntas diferentes y buscar las respuestas en lugares también diferentes. Podemos necesitar de algunas nuevas destrezas y sensibilidades si vamos a enfocar estos desarrollos de manera sensata. En particular, debemos empezar a recurrir a formas de análisis financiero y de negocios o, para decirlo de otra manera, debemos «seguir al dinero»<sup>7</sup>.

En consecuencia, la educación ha pasado de ser un instrumento al servicio del Estado para satisfacer su propio desarrollo económico y, de paso, integrar y cohesionar al conjunto de la población (sobre todo en sus etapas inferiores), a convertirse en un instrumento al servicio de las grandes corporaciones económicas y financieras para satisfacer sus propios intereses, segregar y, de paso, obtener la excelencia acrítica de los privilegiados («borregos excelentes», según expresión de Deresiewicz) que pueden acceder a ella<sup>8</sup>. La naturaleza, sentido, propuestas, metodologías, administración, gestión, motivación, finalidades y destinatarios, ha cambiado radicalmente en las tres últimas décadas tanto en los niveles inferiores como en los correspondientes al posgrado. Y lo más visible en todo ello no es precisamente la retórica sobre la eficacia, la universalización y la emprendeduría que tanto se proclama, sino la reproducción real de las desigualdades sociales y la ruptura de las conquistas y consensos alcanzados en anteriores etapas históricas; esta apreciación se hace más palpable a partir del año 2008, tras la crisis generalizada del modelo de acumulación capitalista en los países desarrollados.

La educación se ha convertido en mercancía, los alumnos en clientes a los que hay que satisfacer y dar siempre la razón a través de la optimización de sus resultados, y los profesores en empleados dóciles (simples tutores o mentores) que cumplen su cometido convirtiéndose en orientadores de la transmisión (no de la creación, revisión o cuestionamiento) del saber. El resto, es parte del juego establecido ‘inocentemente’ por el mercado y sus ideólogos. Sin embargo, como nos recuerda Ordine, «Las escuelas y las universidades no pueden manejarse como empresas. Contrariamente a lo que pretenden enseñarnos las leyes dominantes del mercado y del comercio, la esencia de la cultura se funda exclusivamente en la *gratuidad*»<sup>9</sup>, esto es, en el acceso de todos a todo, que nos lleva históricamente al siglo XVII y nos evoca a Comenio con su pansofía y pampedia. Más elocuente, si cabe, fue el propio Paulo Freire:

<sup>7</sup> S.J. Ball, *Global Education Policy: austerity and profit*, Conferencia impartida en la Facultad de Educación y publicada por el Servicio de Publicaciones de la Universidad de La Laguna en CD. Tenerife, 2012, p. 35.

<sup>8</sup> Ver a este respecto el libro publicado recientemente por el profesor de la Universidad de Yale, W. Deresiewicz, *Excellent Sheep. The miseducation of the American elite and the Way to a Meaningful Life*, USA, Simon and Schuster Inc., 2014.

<sup>9</sup> N. Ordine, *La utilidad de lo inútil*, Barcelona, Editorial Acantilado, 2013, pp. 80-81.

A mí que siempre rechacé las explicaciones mecanicistas de la historia y de la consciencia, la euforia neoliberal me coge donde siempre estuve: más radical, ninguna sombra de sectarismo, y por eso, más abierto, más tolerante, más indulgente conmigo mismo y con los demás, pero tan decidido como antes en la lucha por una educación que, en cuanto acto de conocimiento, casi no se centre en la enseñanza de los contenidos, sino que desafíe al educando a aventurarse en el ejercicio de no hablar sólo del cambio del mundo, sino de comprometerse realmente con él<sup>10</sup>.

Para constatar, acto seguido, que es imposible hablar de la neutralidad en todos los aspectos de la vida humana, incluida la educación, como tanto se proclama en la actualidad desde las instancias más conservadoras: «la neutralidad de la educación, de la cual resulta el entenderla como quehacer puro, al servicio de la formación de un tipo ideal de ser humano, desencarnado de lo real, virtuoso y bueno, es una de las connotaciones fundamentales de la visión ingenua de la educación»<sup>11</sup>.

## 2. *La educación como simple búsqueda de competencias formativas*

En los países desarrollados, especialmente de la Unión Europea y Norteamérica, pero también en muchos otros de América Latina, Europa del este y Oceanía, se está imponiendo con extraordinaria rapidez el modelo educativo basado en las denominadas competencias educativas<sup>12</sup> como eslabón perdido de aquella otra «conquista» de los años 60 y 70, considerada globalmente un fiasco pedagógico aunque bien recibida por los innovadores orgánicos como factor mercantilizador y productivista, que era la pedagogía por objetivos. Buscar estándares de aprendizaje observables a corto plazo, medibles y evaluables para validar el «rendimiento» adquirido por los alumnos para que estos sean capaces de dar respuesta a problemas concretos, parece ser la clave de

<sup>10</sup> P. Freire, *Pedagogía de la indignación*, Madrid, Morata, 2001, p. 106 (obra póstuma donde se recopilan distintas cartas y escritos).

<sup>11</sup> P. Freire, *La importancia de leer y el proceso de liberación*, Madrid, Siglo XXI, 1984, p. 115 (edición original, 1984, con textos publicados entre 1968 y 1981).

<sup>12</sup> «La gestión por competencias», surgida en el mundo empresarial norteamericano para aumentar la eficacia y productividad y exportada sin reparos a las instituciones educativas, tiene como punto de arranque el trabajo de David McClelland publicado en 1973 y titulado *Testing for Competence rather than for Intelligence*. 40 años después, en el Real Decreto 126/2014 de 28 de febrero por el que se establece el currículo básico de la Educación Primaria, y que desarrolla La Ley Orgánica 8/2013 de 9 de diciembre para la Mejora de la Calidad Educativa (LOMCE) aprobada en España por el gobierno conservador del Partido Popular, se definen las competencias como «capacidades para aplicar de forma integrada los contenidos propios de cada enseñanza y etapa educativa, con el fin de lograr la realización adecuada de actividades y la resolución eficaz de problemas complejos». La definición no es nada original y se ciñe a la tónica general de lo legislado hace años en otros Estados europeos y extraeuropeos, y por gobiernos de distinto credo ideológico.

los modelos de aprendizaje (no se habla de enseñar sino de aprender) actuales. Bajo el ropaje de la búsqueda de la autonomía del estudiante, del conocimiento práctico, del éxito escolar, de la despolitización de las cuestiones académicas, de las metodologías y procedimientos innovadores y flexibles y, en las etapas superiores, de la profesionalización *ad hoc* entendida como el saber experto y la ultraespecialización, todos aquellos contenidos más abstractos, universales, reflexivos y abarcadores del conjunto de la sociedad, que conducen al cultivo de la ciudadanía y de sus manifestaciones actitudinales más elementales con los demás miembros de la 'polis', han desaparecido, se van diluyendo por vetustos, o se han desacreditado de un plumazo por no responder a las nuevas demandas del mercado donde la rentabilidad económica rara vez repara en los costes humanos y sociales que deja tras de sí<sup>13</sup>.

Se oculta, además de silenciar reiteradamente, que las competencias educativas tienen una vida útil de muy pocos años (menos de 10) y que el capital intelectual se deprecia una media de un 7% cada año, como constató el informe elaborado por la Comisión Europea de fecha 24 de mayo de 1991 y que conocimos siete años después a través del trabajo de Gérard de Selys y Nico Hirtt, voceros de éste y otros organismos internacionales como la OCDE o el European Round Table<sup>14</sup>. Como acabamos de señalar, y se subraya en este modelo de actuación educativa, los logros de aprendizaje se miden en tablas estandarizadas de rendimiento y a través de criterios internacionales sobre avance y utilidad global, para adquirir de manera tecnocrática, tecnicista y pragmática el ideal de calidad y eficacia. Dicho de otro modo, «la agenda» de objetivos no se ciñe a los contextos múltiples y plurales sino que se convierte en un pretexto uniformador, «fabricando consensos» en acertada expresión de Noam Chomski<sup>15</sup>. Se confunde el trabajo técnico y administrativo con el trabajo académico de movilidad social, educativa y cultural como había ocurrido hasta fechas relativamente recientes y siempre tomando como referencia la perspectiva histórica; tras esta reflexión ¿qué sentido tiene hablar de «realización adecuada de actividades» y de «resolución eficaz de problemas», como acabamos de hacer notar a pie de página, si en breve quedarán desfasados actividades y problemas en sustitución de otros, por las demandas frenéticas de un presente con aspiraciones de volver obsoleto todo a su alrededor?, ¿no estaremos buscando mayor grado de utilidad, adaptación y acomodo a la

<sup>13</sup> Ver a este respecto, entre otros muchos tratados, las siguientes obras literarias: I. Calvino, *Por qué leer los clásicos*, Madrid, Siruela, 2009; M. Nussbaum, *Sin fines de lucro. Por qué la democracia necesita de las humanidades*, Buenos Aires, Katz, 2010; y N. Ordine, *La utilidad de lo inútil*, Barcelona, Editorial Acantilado, 2013.

<sup>14</sup> J.C. Michéa, *La escuela de la ignorancia (y sus condiciones modernas)*, Madrid, Acuarela y A. Machado Libros, 2009, p. 43 (edición original, 1999).

<sup>15</sup> N. Chomsky, I. Ramonet, *Cómo nos venden la moto. Información, poder y concentración de medios*, Barcelona, Icaria, 2010, p. 13 (primera edición, 1995).

nueva organización productiva configurada en esta fase global, postindustrial, internetizada e individualista?<sup>16</sup>

Ante esta situación convendría volver a hablar de un proyecto de trabajo basado en lo racional, intelectual e independiente para no caer en la crítica expuesta por el filósofo hispano-norteamericano, George Santayana, a la hora de entender la educación – como también hizo con el fanatismo – como el ejercicio basado en redoblar el esfuerzo cuando se ha olvidado el objetivo que lo produjo. Algo parecido a lo que le ocurrió al conejo blanco en la obra de *Alicia en el País de la Maravillas* de Lewis Carroll, cuando sentía llegar tarde a todas partes sin saber muy bien a dónde ir. Siguiendo esta línea de pensamiento contrahegemónica, debemos plantear la necesidad de educar y formar en herramientas conceptuales válidas para dar respuesta a las exigencias diarias a través de valores universales, a riesgo – eso sí – de que con ello se acabe el negocio económico y pseudo-académico de la educación permanente cursada a lo largo de toda la vida, adaptada a cada circunstancia personal y favorecedora de respuestas puntuales para cada casuística didáctica. Del siguiente modo constataba el sociólogo Manuel Castells la diferencia existente entre educación (como actividad universalmente válida) y cualificación (como práctica coyuntural e interesada, perfectamente adaptada a las demandas de las competencias):

El concepto de educación debe distinguirse del de cualificación. Ésta puede quedar obsoleta rápidamente por el cambio tecnológico y organizativo. La educación (que no es un almacén de niños y estudiantes) es el proceso mediante el cual las personas, es decir, los trabajadores, adquieren la capacidad de redefinir constantemente la cualificación necesaria para una tarea determinada y de acceder a las fuentes y métodos para adquirir dicha cualificación<sup>17</sup>.

La educación, entendida de manera instrumental como simple cualificación, se ha reducido a mero problema de procedimiento en la toma de decisiones sobre la adopción de un conocimiento parcial e interesado, en lugar de indagar en la naturaleza del objeto de estudio con afán liberador, con rigor metodológico en su tratamiento y con posibilidades de acceso para la amplia mayoría de la población. Con el soporte legal de las guías docentes – anteriormente, programas de las asignaturas de tenor más orientativo en los contenidos – y con los cronogramas incorporados a las mismas y toda la filosofía ordenancista que

<sup>16</sup> «En este sentido, la competencia es aquello por lo cual un individuo es útil en la organización productiva. La noción tendría tanto mayor pertinencia actualmente cuanto las transformaciones del trabajo, en particular con la difusión de las nuevas tecnologías de la información, rompen los antiguos vínculos entre un oficio, un ramo y un diploma [...] La competencia está estrechamente conectada con la exigencia de eficacia y de flexibilidad exigida a los trabajadores en la «sociedad de la información». C. Laval, *La escuela no es una empresa. El ataque neoliberal a la enseñanza pública*, Barcelona, Paidós, 2004, p. 95 (edición original, 2003).

<sup>17</sup> M. Castells, *La era de la información: Economía, sociedad y cultura. Fin de milenio*, Madrid, Alianza Editorial, 2006, vol. III, p. 411 (edición original, 1998).

los caracteriza y regula, se dicta el quehacer de cada clase, hora a hora, con la antelación planificada de un curso académico como mínimo; da igual el tipo de alumnado, el contexto en el que se desarrolle la actividad docente, el profesor o profesora que imparta en distintos grupos, etc., todo debe estar sujeto a las directrices programadas al detalle que se resumen en cumplimiento de tareas, eficacia, homogeneidad y rendimientos de cuentas. Tras dicha constatación, ¿qué sentido tiene esta manera de actuar dentro y fuera de las aulas más allá del minucioso control ejercido sobre todo el proceso educativo?, ¿dónde queda la creatividad, la reflexión y el dinamismo de las clases?<sup>18</sup>, ¿dónde situar la responsabilidad adquirida en cada momento entre docentes y discentes? Porque la falta de respeto al proceso educativo, a las prácticas pedagógicas y, sobre todo, al alumnado, no se da sólo ni fundamentalmente a través de la vulneración, conculcación o represión de sus derechos, sino también a través del trato despersonalizado de todos como simples partes de un amorfo montón.

Lo mismo cabría decir del concepto de educación competitiva y de la búsqueda de la excelencia como mecanismos de inmovilidad social y de involución en la igualdad de oportunidades, individualizando un proceso que sabemos que, por naturaleza, es profundamente social; entendemos que son artimañas para rendir cuentas y hacer más rentable (más mercantilizable y privatizable) el proceso de enseñanza-aprendizaje, poniendo el foco de atención en la educación como superación personal y no como oportunidad social, ignorando que es la sociedad – con sus acuerdos y desacuerdos, con sus posiciones y disposiciones – la que diseña sus propias formas de continuidad o ruptura<sup>19</sup>. Tal y como expresaba Paulo Freire a este respecto, no es la educación la que da forma a la sociedad mecánicamente, sino la sociedad la que formula sus propias normas y crea la educación capaz de adaptarse a esos valores que la sustentan. «La idea de la educación como un trampolín para modificar la realidad surge en parte de una comprensión incompleta del ciclo epistemológico [...]. Por eso toda transformación radical y profunda de un sistema educativo sólo puede producirse (e incluso entonces, no automáticamente ni mecánicamente) cuando la sociedad misma se encuentra también radicalmente transformada»<sup>20</sup>. Con anterioridad ya había abordado este asunto y había afirmado que «no es la educación la que conforma la sociedad de cierta manera, sino la sociedad la

<sup>18</sup> El filósofo de la Ciencia y Premio Príncipe de Asturias de Humanidades, Mario Bunge, ha dicho a sus 95 años de edad que «la búsqueda de información hace que todo sea más rápido, pero obstaculiza la creatividad y la imaginación [...]. Se enseñan ideas pero no se enseña a discutir las» («El País», 2 de mayo de 2014).

<sup>19</sup> Stéphane Hessel y Edgar Morín hablaban explícita y literalmente de la necesidad de proceder a la desburocratización y descompetitividad en la política económica y social del “buen vivir”. S. Hessel, E. Morin, *El camino de la esperanza*, Barcelona, Destino-Paidós, 2012, p. 35 (edición original, 2011).

<sup>20</sup> P. Freire, *La naturaleza política de la educación. Cultura, poder y liberación*, Barcelona, Paidós y Ministerio de Educación y Ciencia, 1990, p. 168 (edición original, 1985).



que, conformándose de cierta manera, constituye la educación de acuerdo con los valores que la orientan»<sup>21</sup>.

Estas palabras parecen conducirnos a una idea fundamental que pasa inadvertida en los tiempos actuales: ni los modelos educativos, ni las reformas políticas que tratan de diseñarlos, ni la sociedad en cuanto forjadora de valores y de ideales, ni siquiera gran parte del gremio de educadores y pedagogos, desean cambios radicales más allá del devenir propuesto por las formas de actuación ampliamente aceptadas (o al menos, no mayoritariamente cuestionadas) del modelo capitalista neoliberal; y, sin embargo, «la educación verdaderamente liberadora sólo puede ponerse en práctica al margen del sistema ordinario, e incluso entonces con gran cautela, por parte de aquellos que superan su ingenuidad y se comprometen con la auténtica liberación»<sup>22</sup>. Separar la educación de la política como propuesta de mejora social solo puede conducir al engaño y a la mistificación: «Ya se efectúe de modo ingenuo o astuto, separar la educación de la política no sólo resulta artificial sino peligroso. Pensar en la educación como independiente del poder que la constituye divorciada del mundo real en que se forja nos lleva o bien a reducirla a un mundo de valores e ideales abstractos [...] o a convertirla en un repertorio de técnicas de comportamiento, o a percibirla como un trampolín para modificar la realidad»<sup>23</sup>.

Con relación a estos planteamientos, Freire ponía el acento no en el saber hacer tan demandado en el modelo ‘competencial’ actual, sino en el saber ser y saber comportarse en sociedad. La educación no servía para nada más (y nada menos) que convertirnos en ciudadanos comprometidos con – y eficientemente preparados para intervenir en la transformación de – la realidad. Por ello, ponía voz a los silencios clamorosos a los que eran sometidos los sectores sociales más desfavorecidos, al destacar en todas sus intervenciones que era fácil de argumentar lo que resultaba aún más sencillo de demostrar; y el espejo donde mirar no era otro que el que nos ofrecía la realidad más cercana y, por tanto, más apropiada para el análisis y el cambio en cada contexto social y con el patrocinio de todos los agentes que lo determinan. Freire no habla de conductas ni de comportamientos aislados, habla de principios y de valores universales que deben ser adquiridos a través de la implicación y para la transformación. Llegados a este punto, y siguiendo las indicaciones de los textos de Freire, conviene advertir que no sólo ha cambiado el sentido en el giro experimentado por las cuestiones relativas a la educación, sino el centro de gravedad en torno al cual se articula el problema más general del conocimiento. Eso era lo que criticaba con profusión y vehemencia en todas sus obras Paulo Freire, al advertir, desde hace décadas, lo que magistralmente ha teorizado recientemente

<sup>21</sup> Id., *La importancia de leer y el proceso de liberación*, Madrid, Siglo XXI, 1984, p. 88 (edición original, 1984, con textos publicados entre 1968 y 1981).

<sup>22</sup> Id., *La naturaleza política de la educación. Cultura, poder y liberación*, cit., p. 133.

<sup>23</sup> *Ibid.*, p. 167.

el profesor Ferrajoli sobre el auténtico eje de apoyo de la flamante sociedad de la información: «Ya no tenemos el gobierno público y político de la economía, sino el gobierno privado y económico de la política»<sup>24</sup>.

### 3. *¿Un nuevo modelo educativo o renovadas formas de instruir de manera camuflada a través de las TICs?*

Hace mucho que en los espacios académicos e investigadores, en los tiempos dedicados a la docencia y en los intersticios de ambos dispuestos a la reflexión sobre la mejora educativa, se viene presentado las TICs como las fórmulas magistrales para alcanzar el éxito y el progreso de las nuevas generaciones (de «emprendedores» como se afirma actualmente, con ligereza e imprecisión, como si dependiera de la libre elección) tantos siglos deseados y siempre con resultados manifiestamente frustrados. Sin ellas, no se concibe la «moderna» mentalidad en torno a la educación y a la adquisición del conocimiento, y en todo proceso evaluador que se precie aparecen los ítems que valoran su incorporación como aspecto esencial para alcanzar la calidad educativa y la excelencia tantas veces voceada como nunca definida ni especificada.

De norte a sur y de este a oeste en los Estados considerados ricos, o en los que con poca originalidad tratan de emular a estos, lo que había sido calificado como simples instrumentos o medios para facilitar la comunicación educativa se han convertido en contenidos esenciales y de alto rango (por no decir valor) curricular; en toda reforma que se precie, desde la etapa infantil hasta la universidad, la competencia digital descuella por encima de todas las demás. En este prado otoñal las asignaturas que desarrollan aspectos relacionados con las TICs han brotado como setas en medio de los campos y los aficionados a la micología digital utilizan cualquier excusa para encumbrar más el procedimiento que los propios contenidos o fines del aprendizaje marcando las pautas hasta de las nuevas formas de pensar<sup>25</sup>. Aún sabiendo y aceptando que la sociedad informacional es imparable por su potencial de negocio y por su capacidad para ejercer el control sobre los individuos que utilizan sus navegadores y dependen

<sup>24</sup> L. Ferrajoli, *La democracia a través de los derechos. El constitucionalismo garantista como modelo teórico y como proyecto político*, Madrid, Trotta, 2014, p. 137 (edición original, 2014).

<sup>25</sup> Así lo testimonia C. Laval: «Al escuchar a muchos expertos, se tiene la impresión de que en la «sociedad de la información» la escuela ya no tiene que educar, ni instruir, ni formar en el pensamiento justo, sino que debe enseñar a recolectar, seleccionar, tratar y memorizar las ‘informaciones’. Es la tecnología la que dictaría no sólo las nuevas formas de ‘enseñar’, sino más profundamente las nuevas formas de ‘pensar’, un pensar que en este caso se identificaría más que nunca con un ‘hacer’ y con un ‘comunicar’ en el espacio virtual, y que se encontraría en la más perfecta continuidad con el nuevo ambiente profesional» (Laval, *La escuela no es una empresa. El ataque neoliberal a la enseñanza pública*, cit., p. 285).

de su información al instante (la digitalización de la información ha contribuido, además de a su comodidad en el acceso, a su centralización y uniformidad), si partimos de la base de la educación como liberación en el sentido abordado por Freire (que deseaba enseñar a saber pero también a sentir y, por tanto, a vivir), cabría preguntarse qué función educativa tienen las TICs para transformar las mentalidades tal cual él lo afirmaba desde una posición radicalmente social y política. Como bien expresaba, «Divinizar o satanizar la tecnología o la ciencia es una forma altamente negativa y peligrosa de pensar errado [...]. Desde el punto de vista del pensar acertado no es posible cambiar y hacer de cuenta que nada cambió. Es que todo el pensar acertado es radicalmente coherente»<sup>26</sup>.

Siguiendo esta misma lógica de coherencia y análisis, en la introducción al libro titulado *La sociedad de la ignorancia*, donde participan varios especialistas en TICs y donde se reflexiona sobre el impacto que tienen en la sociedad, se expone con toda rotundidad y crudeza una idea que debería hacernos repensar el desbordamiento humano al que nos conducen las tecnologías: «El crecimiento hiperbólico de la sociedad del conocimiento amenaza con superar las capacidades biológicas y genéticas de la humanidad. De ese modo, su éxito continuado amenaza con condenar sin remedio a la «incultura» a todos y cada uno de los individuos que la integran. Nadie puede situarse al nivel que está alcanzando la sociedad del conocimiento como estadio contemporáneo de la evolución cultural de la humanidad»<sup>27</sup>. Más contundente, si cabe, es Daniel Sieberg, corresponsal de tecnología para las cadenas estadounidenses CNN y CBS y, en la actualidad, director de Relaciones con los Medios de Comunicación de Google, quien habla directamente de aplicar una «dieta digital» para reducir el peso de las tecnologías de la información en nuestras vidas y, de paso, advertir de los peligros que entraña lo que denomina 'la niñera digital' (ofrecer artilugios tecnológicos a los niños para que estén entretenidos y se alejen de nosotros)<sup>28</sup>. Y todo ello, a pesar de aceptar que la aplicación de nuevas tecnologías es esencial en áreas tan dispares y destacadas como la ingeniería, la medicina, la arquitectura, la astronomía... y hasta la educación, lo que ocurre es que lo que siempre ha sido un recurso o un instrumento de ayuda, ha devenido la esencia misma del conocimiento como mediador de la acción y esto tiene peligrosas consecuencias por el reduccionismo cognitivo y emocional que comporta, hasta el punto de convertir dicho conocimiento en

<sup>26</sup> Freire, *Pedagogía de la autonomía*, cit., p. 35.

<sup>27</sup> Y unas líneas más adelante constata: «Dada la creciente desproporción entre la capacidad colectiva para generar saber y la capacidad individual para asumirlo e integrarlo en nuestra experiencia vital, parece justificado y quizás inevitable pensar en el advenimiento de una 'sociedad de la ignorancia o de la incultura'». G. Mayos, A. Brey (edd.), *La sociedad de la ignorancia*, Barcelona, Ediciones Península, 2011, pp. 17 y 18.

<sup>28</sup> D. Sieberg, *El amor a la tecnología no debe ser incondicional*, «El País», 23 de junio de 2014. Aún más interesante es su libro, *The digital diet*, USA, Crown-Three Rivers, 2011. Véase también el libro de E. Ferrari Nieto, *Resis-tencias con lo digital*, Madrid, Catarata, 2014.

mera praxis instrumental<sup>29</sup>; una manera de entender la educación a través de grandes arsenales digitales que se centran en la imagen y en la distancia y no en la palabra y el acercamiento entre los protagonistas del proceso creativo del conocimiento. Tal y como expresó con acierto N. Postman hace dos décadas, y el problema ha aumentado en progresión geométrica, las circunstancias han hecho que la cultura se haya rendido a la tecnología<sup>30</sup>.

En efecto, cuando en ciudades como Nueva York se han retirado los ordenadores de las escuelas y en zonas como Silicon Valley los hijos de los afamados técnicos informáticos de Google, Apple, Yahoo y Hawlett Packard, asisten a colegios waldorf en los que solo se enseña informática a partir de los 13 años, se fomentan las tradiciones y se estrechan los lazos de solidaridad entre ellos y, además, hay una búsqueda constante de la cultura de la «desconexión» o del «retiro digital» [de-teching], en la mayor parte del mundo se deja la innovación pedagógica en manos de los técnicos en sistemas operativos y, más impersonalmente, del denominado ciberespacio. Se desprecia el contacto entre los alumnos, y entre los alumnos y el maestro, a pesar de que el profesor Paul Thomas, especialista en estos ámbitos del saber en la Universidad de Furman (Carolina del Sur), manifieste que «poca tecnología en el aula favorece el aprendizaje» y que «la tecnología es una distracción»<sup>31</sup>. Freire afirmaba a tenor de ello que «no es posible encarar la educación a no ser como un quehacer humano. Quehacer, por tanto, que se da en el tiempo y en el espacio, entre los hombres, unos con otros»<sup>32</sup>. Quizás, en los tiempos que corren extremadamente credencialistas, nuestra mayor preocupación deba centrarse en impedir la distracción (entiéndase, la indiferencia y hasta el desprecio) de las nuevas generaciones por el conocimiento analítico, razonado y crítico a través del contacto humano con los demás.

<sup>29</sup> Pese a considerarlo un simple instrumento, esto es, una herramienta sofisticada para auxiliar el trabajo artesanal desarrollado con los alumnos, algunos autores reparan en que su uso no es en absoluto neutral; detengámonos en la siguiente reflexión de Morozov: «No existe idea más banal, ubicua y engañosa que la que afirma la neutralidad de la tecnología. Todo depende, nos dicen con frecuencia, de cómo decidas utilizar una herramienta determinada: un cuchillo puede emplearse para matar a alguien, pero también para tallar una madera [...]. El hecho de que una tecnología determinada posea múltiples potencialidades y esté abierta a muchos usos no obvia la necesidad de examinar con detenimiento su constitución ética, comparar los efectos de sus usos desde el punto de vista social con sus usos perjudiciales, evaluar qué usos van a prevalecer y, por fin, decidir si vale la pena establecer leyes y políticas que amplifiquen o mitiguen algunos de los efectos consiguientes». E. Morozov, *El desengaño de internet. Los mitos de la libertad en la red*, Barcelona, Destino, 2012, pp. 373-375 (edición original, 2011).

<sup>30</sup> N. Postman, *Tecnópolis: la rendición de la cultura a la tecnología*, Barcelona, Galaxia Gutenberg, 1994.

<sup>31</sup> M. Richtel, *A Silicon Valley School That Doesn't Compute*, «New York Times», octubre de 2011. Véase también: *Poniendo nota a la Escuela Digital*, «Revista Digital Mundonuevo», 25 de octubre de 2013.

<sup>32</sup> P. Freire, H. Fiori, J.L. Fiori, *Educación liberador*, Bilbao-Madrid, Zero, 1975, p. 49 (edición original, 1973).

Avancemos en la trascendencia de esta idea. A mediados de febrero de 2014, Mark Zuckerberg, creador y propietario de la multinacional Facebook (2004), compró el servicio de mensajería instantánea WhatsApp por el precio de 19.000 millones de dólares<sup>33</sup>; mes y medio después compró Oculus VR por valor de 2.000 millones para hacerse con el control de las gafas capaces de crear realidades virtuales. Según sus propias palabras, pobremente traducidas al español, «estamos haciendo una apuesta a largo plazo cuando la realidad inmersiva, virtual y aumentada se convertirá en una parte de la vida cotidiana de las personas»<sup>34</sup>. Sus aplicaciones son variadas en ámbitos tan dispares como los videojuegos, la arquitectura, los automóviles, el comercio y, también manifiesta con indisimulada alegría, la educación. Dejamos de ver la realidad tal cual es para ver lo que otros desean que veamos, creándonos una nueva, alternativa y más placentera realidad inventada a medida de determinadas voluntades e intereses. Como acertadamente apreció el Nobel de Literatura del año 2010, al criticar la que denominó ‘civilización del espectáculo’, «la diferencia esencial entre aquella cultura del pasado y el entretenimiento de hoy es que los productos de aquella pretendían trascender el tiempo presente, durar, seguir vivos en las generaciones futuras, en tanto que los productos de éste son fabricados para ser consumidos al instante y desaparecer, como los bizcochos o el *popcorn*»<sup>35</sup>. Nada tiene de extraño, por tanto, que nos invadan titulares de prensa que nos retrotraen a los más simples y peregrinos estándares de la rica corriente de filosofía hedonistas: «Los grandes editores holandeses venden sus noticias a la carta ‘online’»<sup>36</sup>; sólo somos receptivos para aquello que deseamos ver o escuchar y nos proporciona un estado de ánimo altamente placentero.

Nos recuerda todo esto el vocablo expresado en 1995 por el ideólogo neoliberal y miembro de la trilateral, Zbigniew Brzezinski, cuando hablaba de «tittytainment» o «entetanimiento» para mantener aletargado, incluso podríamos decir que «sedado», al 80% de la población sobrante y frustrada del planeta<sup>37</sup>. Más relacionado con nuestro campo, está el vocablo «edutainment»

<sup>33</sup> La operación se acaba de cerrar a comienzos del mes octubre de 2014, y Facebook ha tenido que pagar 2.300 millones de euros más de lo previsto debido al incremento del valor de las acciones de la red social. *Facebook concluye la compra de Whatsapp*, «Público», periódico digital, 7 de octubre de 2014.

<sup>34</sup> El otro gigante, Google, ha hecho lo propio con el modelo de gafas Glass. *Facebook compra Oculus*, «El País», 26 de marzo de 2014. El problema principal en todo ello es que ya se anuncia por parte de especialista en la materia, como Denny Unger trabajador de Cloudhead Games, que «estamos muy cerca de ver la primera muerte por culpa de la realidad virtual» («El País», 26 de agosto de 2014). Para corroborar estas ideas, Julian Assange, fundador de Wikileaks, ha acusado al gigante tecnológico de «agente colonizador» y ha afirmado taxativamente que «Google no vende un producto, el producto es la gente». J. Assange, *When Google Met Wikileaks*, New York and London, OR Books, 2014.

<sup>35</sup> M. Vargas Llosa, *La civilización del espectáculo*, Madrid, Alfaguara, 2012, p. 31.

<sup>36</sup> «El País», 29 de abril de 2014.

<sup>37</sup> H.-P. Martin, H. Schumann, *La trampa de la globalización. El ataque contra la democracia y el bienestar*, Madrid, Taurus, 1998, pp. 7-11 (edición original, 1996).

para hacer referencia al combinado entre educación y ocio<sup>38</sup>, terminando por convertir al ser humano en simple «homo on-line et voluptas» con sobradas «competencias» para hacer frente a las opciones seductoras que se le presenten como voraz consumidor, y sin herramientas conceptuales para discernir sobre su propio futuro como especie. Así lo testimoniaba Freire: «Para mí, aunque hoy se pregone que la educación ya no tiene nada que ver con el sueño, sino con el entrenamiento técnico de los educandos, sigue en pie la necesidad de que insistamos en los sueños y en la utopía. Las mujeres y los hombres nos transformamos en algo más que simples aparatos para ser entrenados o adiestrados, nos convertimos en seres de opción, de decisión, de intervención en el mundo, seres de responsabilidad»<sup>39</sup>. Y añadía (o, mejor dicho, había añadido muchos años antes): «Para ser válida, toda educación, toda acción educadora debe necesariamente estar precedida de una reflexión sobre el hombre y de un análisis del medio de vida concreta del hombre concreto a quien uno quiere educar [...]»<sup>40</sup>.

Es en ese ciberespacio y a través del ciberutopismo («fe ciega en la naturaleza emancipadora de la comunicación en la red») <sup>41</sup> donde deben ser ‘colgados’ los contenidos y donde los alumnos, en ausencia de profesores presenciales, deben captar la esencia de los conocimientos que más satisfagan sus propias necesidades determinando lo que algunos han dado en llamar «la industria de la educación»<sup>42</sup>. La «infoxicación» de los «screenagers» (expresión que comienza a extenderse y que define de manera apropiada la realidad existente en torno a la generación que vive permanentemente frente a la pantalla y que ya es atendida en clínicas especiales para ello en Estados Unidos, China y Corea del Sur, por ejemplo)<sup>43</sup> y el determinismo tecnológico al que puede conducirnos el «e-learning», puestos al servicio de intereses comerciales, gubernamentales o empresariales que nada tienen que ver con los estrictamente educativos, nos abocan a la destrucción del pensamiento crítico y a la ausencia de la reflexión pausada sobre los problemas que acucian al mundo, como en su día demostró en un documentado y contrastado trabajo Nicholas Carr: «Con la excepción de los alfabetos y los sistemas numéricos, la Red muy bien podría ser la más potente tecnología de alteración de la mente humana que jamás se haya usado de forma generalizada. Como mínimo, es lo más potente que ha surgido desde

<sup>38</sup> A. Mattelart, «La nueva comunicación», en I. Ramonet (ed.), *La post-televisión. Multimedia, Internet y globalización económica*, Barcelona, Icaria Antrazyt, 2002, pp. 33-46 (las cita en la p. 42).

<sup>39</sup> P. Freire, *Pedagogía de la indignación*, Madrid, Morata, 2001, p. 141 (obra póstuma donde se recopilan distintas cartas y escritos).

<sup>40</sup> Id., *Fundamentos revolucionarios de pedagogía popular*, Buenos Aires, Editor 904, 1977, p. 31.

<sup>41</sup> E. Morozov, *El desengaño de internet. Los mitos de la libertad en la red*, Barcelona, Destino, 2012, p. 18 (edición original, 2011).

<sup>42</sup> F. Ruiz Tarragó, *Educación, entre la evasión y la utopía*, en G. Mayos, A. Brey (edd.), *La sociedad de la ignorancia*, Barcelona, Ediciones Península, 2011, pp. 127-157, en partic. p. 144.

<sup>43</sup> *Adictos a Internet*, «El País», 15 de septiembre de 2014.

la imprenta», para añadir tres páginas más adelante: «la Red atrae nuestra atención sólo para dispersarla»<sup>44</sup>.

Este y otros motivos, sólo intuición epistemológica y metodológicamente por Freire, pues estaban fuera de toda lógica real en aquellos momentos, le llevaron a constatar que: «la tarea de las educadoras y los educadores progresistas es desocultar verdades, jamás mentir. De hecho la *desocultación* no es tarea para los educadores al servicio del sistema. Evidentemente, en una sociedad de clases como la nuestra, es mucho más difícil trabajar en favor de la *desocultación*, lo que es nadar contra la corriente, que trabajar *ocultando*, lo que es nadar en favor de la corriente. Es difícil, pero posible»<sup>45</sup>. Así, pues, no podemos entender como instrumentos de liberación y de educación transformadora lo que son armas de dominación y sometimiento por muy tentadoras que se presenten como recetas indicadas para crear oportunidades y beneficios. Una vez más debemos recurrir a los argumentos de nuestro autor de referencia: «lo que me parece fundamental para nosotros hoy, mecánicos o físicos, pedagogos o albañiles, carpinteros o biólogos, es la asunción de una posición crítica, vigilante, indagadora, frente a la tecnología»<sup>46</sup>.

<sup>44</sup> N. Carr, *¿Qué está haciendo internet con nuestras mentes? Superficiales*, Madrid, Taurus, 2011, pp. 144 y 147 (edición original, 2010); R. Watson, *Mentes del futuro: ¿está cambiando la era digital nuestras mentes?*, Barcelona, Viceversa, 2011, pp. 23-62 (edición original, 2010); G. Small, G. Vorgan, *El cerebro digital. Cómo las nuevas tecnologías están cambiando nuestra mente*, Barcelona, Ediciones Urano, 2009, pp. 15-38 (edición original, 2008). «La era digital también está erosionando nuestra capacidad de concentración. La calidad de nuestro pensamiento y en última instancia de nuestras decisiones está sufriendo. Los aparatos digitales nos están convirtiendo en una sociedad de idiotas. Si cualquier trozo de información se puede recuperar con un solo clic del ratón, ¿para qué preocuparnos en aprender nada? Nos estamos convirtiendo en Google adictos, pasando por nuestros días sin pensar en profundidad sobre lo que estamos haciendo realmente o hacia dónde vamos en realidad» (Watson, *Mentes del futuro: ¿está cambiando la era digital nuestras mentes?*, cit., p. 13). Las primeras líneas introductorias del libro de Small y Vorgan también deben ser tenidas en consideración: «La actual eclosión de la tecnología no sólo está cambiando nuestra forma de vivir y comunicarnos, sino que está alterando, rápida y profundamente, nuestro cerebro [...] La tecnología digital, además de influir en cómo pensamos, nos está cambiando la forma de sentir y comportarnos, y el modo de funcionar de nuestro cerebro» (Small, Vorgan, *El cerebro digital. Cómo las nuevas tecnologías están cambiando nuestra mente*, cit., pp. 15-16). Si a ello añadimos los resultados obtenidos por los experimentos realizados por Benjamin Libet, en los años 80 y, más recientemente, por John-Dylan Heynes y su equipo de colaboradores en el Instituto Max Planck de Ciencias Cognitivas y Neurología de Leipzig, sobre las influencias inconscientes en los procesos de toma de decisiones que consideramos racionalmente planificadas y controladas, el resultado puede ser un cóctel explosivo en el cambio de conductas y en la propia personalidad.

<sup>45</sup> P. Freire, *Política y educación*, Madrid, Siglo XXI, 1997, pp. 109 y 110 (edición original, 1993).

<sup>46</sup> Id., *Pedagogía de la esperanza*, cit., p. 127.

### *Conclusiones provisionales*

La educación no puede ser considerada un simple instrumento al servicio de determinadas ideologías y voluntades que solo reparan en la búsqueda interminable del éxito individual, cada vez más excluyente, y no en la integración y cohesión de los distintos sectores que conforman las cambiantes dinámicas sociales. En un mundo en el que, según fuentes de la ONG Intermon Oxfam, los 85 multimillonarios más ricos del planeta acumulan tanto dinero como los 3.570 millones de pobres que malviven diariamente, la educación debe servir para facilitar la vida y no para escamotearla, ignorarla o reproducirla. Freire defendía la transformación de la sociedad con la educación como bandera y, por ello (y para ello), proponía entender la democracia no solo como régimen político de representación, sino como ideal político de participación en la toma de decisiones; dicho de otra manera, su *leit motiv* consistía en preguntarse cómo debían estructurarse las relaciones de poder y la redistribución de las riquezas en las sociedades desarrolladas y complejas, apostando para ello por fomentar la alfabetización de toda la población («el analfabeto es un hombre perdido», afirmaba Freire)<sup>47</sup>, incrementar el apoyo social y cultural (y no el mero asistencialismo), y enfatizar el aprendizaje de saberes no instrumentales.

Una de las grandes – si no la mayor – tragedias del hombre moderno es que hoy, dominado por la fuerza de los mitos y dirigido por la publicidad organizada, ideológica o no, renuncia cada vez más, sin saberlo, a su capacidad de decidir. Está siendo expulsado de la órbita de las decisiones. El hombre simple no capta las tareas propias de su época, le son presentadas por una élite que las interpreta y se las entrega en forma de receta, de prescripción a ser seguida<sup>48</sup>.

Estaba convencido de que dar conocimiento a quien carece de él engrandece a quien lo da, agiganta a quien lo recibe y enriquece a la sociedad en su conjunto. De esta manera, para Freire, como para muchos otros educadores y pensadores a los que en la actualidad se intenta borrar su estela y, con ella, sus ideas y ejemplos transformadores, lo importante no era situarse en la línea de meta del éxito y comprobar quién llegaba, sino colocarse a mitad del trayecto y facilitar el recorrido a todos los participantes que ilusionados habían comenzado la carrera por la vida y el saber; era en ese punto donde debía situarse y fomentarse el umbral de solidaridad y resistencia, y no en ningún otro de selectivo, arbitrario y sectario acceso.

<sup>47</sup> Freire, Fiori, Fiori, *Educación liberadora*, cit., p. 67 (edición original, 1973).

<sup>48</sup> P. Freire, *La educación como práctica de la libertad*, Madrid, Siglo XXI, 2002, p. 33 (edición original, 1969). Recordemos, a este respecto, el posicionamiento ideológico claramente republicano de las ideas de Freire, vea M. Ferraz Lorenzo, *Republicanism político, ciudadanía participativa y educación crítica. Paulo Freire como referencia*, «History of Education & Children's Literature», vol. VIII, n. 2, 2013, pp. 587-606.



Sin embargo, en los tiempos actuales nos entretenemos en lo cómodo, en fomentar falsos debates educativos y en propiciar reformas y comportamientos que alientan la desesperanza o, por contra, el optimismo exacerbado, y posponen la búsqueda de soluciones reales difuminando el objetivo a conseguir. En palabras de otra Premio Nobel de Literatura – obtenido en 1996 y fallecida hace dos años –, la polaca Wislawa Szymborska, «y al final dejé de saber qué era lo que tanto buscaba»<sup>49</sup>. Hemos perdido el objetivo principal, no buscamos porque no queremos encontrar y nos conformamos con mantener los niveles de ignorancia existentes que, al parecer y en plena sociedad del conocimiento, van vertiginosamente en aumento pese a los avances científico-tecnológicos. No olvidemos, en este sentido, las palabras del gurú de las nuevas tecnologías, fundador del Media Lab del MIT, de la revista «Wired» y de la asociación One Laptop per Child, el neoyorquino Nicholas Negroponte, quien pronostica que a treinta años vista bastará con consumir una píldora para adquirir el conocimiento que deseamos<sup>50</sup>. En fin, nos dejamos arrastrar por los nuevos acróbatas de la educación responsables y cómplices de las políticas hegemónicas, siempre en busca de la excelencia y el éxito, de las competencias y las selecciones, de los ranking y los resultados, de las formas y las cosméticas pedagógicas, que solo sueñan con el ruido y las alturas sin pretender mover y conmover lo más auténtico de cada ser en su lucha diaria por el conocimiento auténtico, la libertad y la simple supervivencia. Hemos llegado a un punto en el que se ha confundido capacidad con rapacidad, competencias con prometedor ascenso profesional y nuevas tecnologías con conocimiento en sí y para sí mismo.

Terminamos, y, como no puede ser de otro modo, con las palabras de quien nos ha inspirado a escribir estas páginas, extrapolables a muchas experiencias y a innumerables situaciones y contextos: «todo es posible: engañar, traicionar, mentir, robar, falsificar, secuestrar, calumniar, matar, asaltar, amenazar, destruir, recibir ‘treinta monedas’ [...]. Es preciso que todo deje de ser posible. La solución no está, obviamente, en el puritanismo hipócrita, sino en el gusto denodado por la pureza»<sup>51</sup>.

<sup>49</sup> W. Szymborska, *Los últimos poemas de Szymborska*, «El País Cultural», Madrid, 23 de junio de 2014.

<sup>50</sup> *Decís que es ridículo, pero...: 30 años después Negroponte vuelve a ver el futuro*, «El Confidencial», diario digital, 10 de julio de 2014.

<sup>51</sup> Freire, *Pedagogía de la esperanza*, cit., p. 167.



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# La recente pubblicazione del *Dizionario Biografico dell'Educazione (1800-2000)* e un trentennio di ricerche storico-pedagogiche in Italia

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*The recent publication of the Dizionario Biografico dell'Educazione (1800-2000) and thirty years of historical-pedagogical research in Italy*

ABSTRACT: Through the contribution of three eminent scholars whose scientific production is focused, respectively, on the school history topics, on the educational processes and on the children's literature, this paper explores the characteristics and the special role that the *Dizionario Biografico dell'Educazione (1800-2000)*, directed by Giorgio Chiosso and Roberto Sani, recently published for the types of Editrice Bibliografica of Milan (2013, 2 vols.), covers in the context of historical and pedagogical and educational studies initiated in Italy during the last thirty years.

EET/TEE KEYWORDS: History of Education; Biographical Dictionary of Education; Historiography of Education; Italy; XIX-XX<sup>th</sup> Centuries.

Carla Ghizzoni

### 1. *Alle 'origini' del Dizionario Biografico dell'Educazione*

In una recente, ampia intervista per la rivista «Espacio Tiempo y Educaciòn» incentrata sul lavoro di ricerca svolto, Giorgio Chiosso ha avuto modo di riflettere anche sul *Dizionario Biografico dell'Educazione*, curato con Roberto Sani<sup>1</sup>. Egli ne iscrive la genesi negli sviluppi degli studi della storia dell'educazione in Italia che peraltro, come emerge dalla lettura dell'intera intervista, si intrecciano con tappe e momenti della biografia scientifica dello studioso torinese. Egli rileva che la crescita della ricerca storico-pedagogica nel nostro Paese, nel senso di una più precisa definizione del proprio statuto epistemologico, è coincisa con il suo lento affrancamento dalla storia delle idee, di matrice neoidealista, e dalla lettura ideologica (di diversa connotazione) che per lungo tempo, almeno fino agli anni Settanta del XX secolo, hanno fortemente condizionato questo settore. È significativo, nota Chiosso, che la valorizzazione, a partire dagli anni Ottanta, di documentazione destinata a rivelarsi di grande interesse e fino a quel momento non adeguatamente esplorata, ovvero la stampa periodica scolastica, da lui incontrata, quasi causalmente, nelle indagini su alcuni protagonisti del dibattito pedagogico nazionale, sia avvenuta guardando a ciò che all'estero (nello specifico in Francia, in Belgio e in Portogallo) si stava facendo su questo fronte<sup>2</sup>.

Non sorprende dunque se, in quegli stessi anni, Marino Raicich, attento alle questioni educativo-scolastiche, lamentava la trascuratezza della storia per questo ambito, convinto che lo studio della scuola, nella quale si sono formate generazioni e generazioni di italiani, costituisse una parte rilevante della storia del nostro Paese<sup>3</sup>. Occorre innanzi tutto, a suo giudizio, «dare un volto preciso» a questa istituzione, anche facendo luce su coloro che, a diversi livelli, ne erano stati i protagonisti (docenti, Ministri, funzionari del Ministero, dipendenti dell'amministrazione scolastica centrale e periferica) e avevano contribuito a delineare e a tradurre nella quotidianità i progetti pedagogici<sup>4</sup>. «Non è strano che il loro volto, o meglio la successione storica dei loro volti – egli si chiedeva –, le loro persone concrete, i loro atteggiamenti, il loro bagaglio

<sup>1</sup> G. Chiosso, R. Sani (dir.), *Dizionario Biografico dell'Educazione 1800-2000*, 2 voll., Milano, Editrice Bibliografica, 2013.

<sup>2</sup> A. Cagnolati, *Espandendo i confini della ricerca storico-educativa. Sulle orme di Giorgio Chiosso*, «Espacio, Tiempo y Educacion», vol. 2, n. 1, 2015, pp. 349-372.

<sup>3</sup> M. Raicich, *Scuola cultura e politica da De Sanctis a Gentile*, Pisa, Nistri Lischi, 1981, in specie l'*Introduzione* alle pp. 11-81.

<sup>4</sup> *Ibid.*, p. 34.



culturale, sono tutte cose a noi praticamente sconosciute?»<sup>5</sup>. Le significative assenze di figure, più o meno illustri, della storia educativa nazionale nel *Dizionario Biografico degli Italiani* erano, a suo avviso, indicative della carenza di studi prosopografici.

Solo recentemente, con la pubblicazione dei due tomi del *Dizionario Biografico dell'Educazione*, che riconsegna all'attualità le biografie di uomini e donne che hanno fatto la storia del Paese sul piano educativo-scolastico, la ricerca storico-pedagogica italiana è riuscita a colmare questa lacuna. L'opera rappresenta uno degli esiti più significativi proprio dello sviluppo delle indagini in questo ambito disciplinare nell'arco di un trentennio; uno sviluppo non lineare<sup>6</sup>, da taluni punti di vista ancora in fase aurorale (si pensi all'internazionalizzazione<sup>7</sup>) e che, come detto, ha dovuto scontare il ritardo con cui la storia dell'educazione ha superato l'impostazione neoidealista per aprirsi progressivamente, a partire dagli anni Settanta, alle metodologie più avvertite della ricerca storica e delle scienze umane. Si è trattato di un percorso segnato dalla volontà di definizione metodologica, di specificazione e differenziazione degli ambiti di indagine, di individuazione e valorizzazione delle fonti inedite e a stampa, di predisposizione di strumenti per la ricerca; tutto questo in un dialogo, dapprima non scontato e

<sup>5</sup> *Ibid.*, p. 36.

<sup>6</sup> Sulla crescita della storia dell'educazione in Italia sono apparsi diversi contributi. Qui ci si limita a richiamare: R. Fornaca, *La ricerca storico-pedagogica*, Firenze, La Nuova Italia, 1975; G. Ricuperati, M. Roggero, *Istruzione e società in Italia: problemi e prospettive di ricerca*, «Quaderni storici», vol. XIII, n. II, maggio-agosto 1978, pp. 640-665; L. Pazzaglia, *Problemi e prospettive delle ricerche storico-pedagogiche*, «Ricerche Pedagogiche», luglio-dicembre 1980, pp. 9-12; G. Ricuperati, *La storia dell'istruzione nella storiografia contemporanea*, in *Storia della scuola e storia d'Italia*, Bari, De Donato, 1982, pp. 71-93; A. Santoni Rugiu, G. Trebisacce (edd.), *I problemi epistemologici e metodologici della ricerca storico-educativa*, Cosenza, Pellegrini, 1983; F. Cambi, *La ricerca storico-educativa in Italia 1945-1990*, Milano, Mursia, 1992; A. Ballone, *La scuola italiana. Problemi storiografici e percorsi di ricerca*, «Rivista di storia contemporanea», nn. 2-3, 1992, pp. 213-247; A. Bianchi, *La storia della scuola in Italia dall'Unità ai giorni nostri. Orientamenti bibliografici ed indirizzi di ricerca nella produzione storiografica recente*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla legge Casati al Centro-sinistra*, Brescia, La Scuola, 2001, pp. 499-529; E. De Fort, *Storie di scuole, storia della scuola: sviluppi e tendenze della storiografia*, in M.T. Segà (ed.), *La scuola fa la storia. Gli archivi scolastici per la ricerca e la didattica*, Portogruaro, nuova dimensione, 2002, pp. 31-70; L. Caimi, *Luoghi e strumenti della ricerca e dell'insegnamento della storia dell'educazione in Italia*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 12, 2005, pp. 317-340; S. Polenghi, *Storiografia pedagogica*, in *Enciclopedia filosofica*, Milano, Bompiani, 2006, vol. XI, pp. 11175-11177; H.A. Cavallera (ed.), *La ricerca storico-educativa oggi. Un confronto di metodi modelli e programmi di ricerca*, 2 voll., Lecce-Brescia, Pensa MultiMedia, 2013.

<sup>7</sup> Si vedano: G. Bandini, *La dimensione internazionale della ricerca storico-educativa: considerazioni su una trasformazione in atto*, in Cavallera (ed.), *La ricerca storico-educativa oggi*, cit., vol. 2, pp. 43-66; J. Droux, R. Hofstetter, *Going international: the history of education stepping beyond borders*, «Paedagogica Historica», vol. 50, nn. 1-2, 2014, pp. 1-9, e più in generale l'intero fascicolo del periodico dedicato a *Internationalisation in Education: Issues, Challenges, Outcomes*; G. Bandini, S. Polenghi (edd.), *Enlarging one's vision. Strumenti per la ricerca educativa in ambito internazionale*, Milano, Educatt, 2015.

ora più consueto, con i diversi filoni della storia e attraverso un confronto, solo recentemente più sicuro, con la storiografia internazionale.

Com'è noto, non erano mancati contributi rilevanti alla ricerca storico-educativa in Italia negli anni precedenti. Si pensi agli studi di Lamberto Borghi e Dina Bertoni Jovine, apparsi nel secondo dopoguerra, che ebbero il merito di utilizzare fonti non adeguatamente considerate fino a quel momento (testi scolastici, stampa periodica) – in particolare la monografia sull'educazione popolare della Bertoni Jovine – e di contestualizzare le vicende educativo-scolastiche italiane nel quadro della situazione politica e culturale. Tali studi, tuttavia, rimanevano legati a una impostazione ideologica; presentavano cioè una configurazione «militante»<sup>8</sup> che affidava anche alla storia dell'educazione una finalità pedagogica<sup>9</sup>: essa intendeva promuovere un cambio di mentalità e guidare il rinnovamento della scuola in atto in quel momento verso forme più democratiche. Tale approccio storiografico, inoltre, non riuscì a tradursi in un nuovo modello per la ricerca storico-pedagogica.

Al di fuori del nostro Paese, in alcune nazioni europee, tale campo di indagine registrava, nel frattempo, significativi passi in avanti grazie agli studi, divenuti dei classici, di François de Dainville sull'azione formativa dei gesuiti fra XVII e XVIII secolo, di Philippe Ariès sul sentimento dell'infanzia nell'Europa medievale e moderna, e più tardi, negli anni Settanta, sulla scorta del rinnovamento storiografico promosso dalla scuola delle «Annales», di François Furet e Mona Ozouf sugli sviluppi dell'alfabetizzazione e sulle sue cause fra '600 e '800, per quanto riguarda la Francia, o di Lawrence Stone sulla formazione della nobiltà britannica nel Seicento, in Inghilterra. Qui l'avvio, nel 1972, della rivista «History of Education» era il segno dei cambiamenti in corso e della volontà di promuovere indagini inerenti a tale ambito tenendo conto dei risultati raggiunti da diversi filoni della ricerca storica.

## *2. Linee evolutive della ricerca storico-educativa in Italia negli ultimi quarant'anni*

Sulla scorta di queste suggestioni, si faceva strada l'idea che le vicende relative alla storia della educazione costituivano un campo di indagine da affrontare secondo un approccio interdisciplinare, nel quale il momento dell'analisi politica e culturale si integrava con quello dell'indagine quantitativa e quest'ultimo con quello dello studio qualitativo. Dagli anni Settanta, anche gli studiosi italiani si confrontarono con gli aspetti salienti della nuova storiografia, quali l'interesse per la dimensione sociale dell'educazione, l'utilizzo degli strumenti di indagine

<sup>8</sup> Bianchi, *La storia della scuola in Italia dall'Unità ai giorni nostri*, cit., p. 503.

<sup>9</sup> Cfr. Cambi, *La ricerca storico-educativa in Italia*, cit., p. 22.

delle scienze sociali, la valorizzazione e il reperimento di fonti inedite. A partire da quegli anni, storici e studiosi di area pedagogica promossero anche in Italia una nuova stagione di ricerche in questo settore con particolare attenzione alla storia della scuola e dell'alfabetizzazione. Si pensi, solo per fare qualche cenno, al filone che prendeva in esame il rapporto fra istruzione e economia (Giovanni Vigo, Carlo G. Lacaita) fondato sui metodi della storia quantitativa<sup>10</sup>, o alle ricerche sulla formazione della classe dirigente in età moderna di Gian Paolo Brizzi, o, ancora, agli studi sugli insegnanti elementari (Giovanni Vigo, Ester De Fort, Angelo Broccoli) e sulla scuola primaria di Ester De Fort, che sapeva coniugare analisi istituzionale, ricostruzione del progetto culturale e pedagogico, utilizzo dei dati statistici e esami della scuola dal "basso", facendo luce cioè sulla vita interna della scuola<sup>11</sup>.

Sollecitazioni a non restare vincolati a una storia dell'educazione come storia delle idee e a ampliare lo spettro dell'indagine a tutte le agenzie coinvolte nei processi formativi venivano avanzate in quello stesso periodo anche da Egle Becchi<sup>12</sup>. Nel 1980, per iniziativa di alcuni docenti universitari, nasceva inoltre il CIRSE (*Centro Italiano per la Ricerca Storico Educativa*), che subito si dotava di una rivista, il «Bollettino»<sup>13</sup>. In quella fase di avvio, il nuovo sodalizio scientifico si misurava con alcune delle questioni poste dal rinnovamento metodologico in atto, quali la prospettiva multidisciplinare, documentata dall'interesse riscosso agli inizi anche presso storici non appartenenti all'area pedagogica<sup>14</sup>, e la dimensione internazionale, come emerge dai lavori del convegno di Cosenza del 1982, dedicato proprio a questioni epistemologiche, che vide la partecipazione di studiosi stranieri<sup>15</sup>. Si trattava però di spinte che nel tempo erano destinate a perdere forza o a restare isolate a singoli componenti del sodalizio.

La lenta messa a fuoco di nuovi temi di studio, sia pure condotti in modo non organico, aveva il merito di palesare la carenza di strumenti di ricerca necessari a chi voleva intraprendere lavori di ricostruzione della storia educativa nazionale. A tale lacuna, anche il nostro Paese pose rimedio, a partire dalla fine degli anni Ottanta, grazie alle iniziative promosse da alcuni gruppi di studiosi

<sup>10</sup> Anche il sociologo M. Barbagli, in *Disoccupazione intellettuale e sistema scolastico in Italia (1859-1973)*, Bologna, il Mulino, 1974, mise a tema la questione relativa al rapporto fra sistema scolastico e mercato del lavoro.

<sup>11</sup> 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.

<sup>12</sup> Cfr. E. Becchi (ed.), *Storia dell'educazione*, Firenze, La Nuova Italia, 1987, in specie l'Introduzione (pp. 1-30).

<sup>13</sup> Cfr. <<http://nuke.cirse.it/>> (ultimo accesso: 12 gennaio 2016); dal 2006 il periodico ha assunto il titolo «Nuovo Bollettino CIRSE», modificato con il primo numero del 2014 in «Rivista di storia dell'educazione. Periodico del Centro Italiano per la Ricerca Storico-educativa».

<sup>14</sup> Cfr. De Fort, *Storie di scuole, storia della scuola: sviluppi e tendenze della storiografia*, cit., p. 55.

<sup>15</sup> Santoni Rugiu, Trebisacce (edd.), *I problemi epistemologici e metodologici della ricerca storico-educativa*, cit.

che coniugavano l'attività di indagine a quella della predisposizione di luoghi e strumenti di ricerca.

Nel 1986, presso l'Università Cattolica di Milano, si teneva il Convegno su *Chiesa e progetto educativo nell'Italia del secondo dopoguerra*<sup>16</sup>. Le riflessioni emerse in quella sede convincevano il gruppo di studiosi, provenienti da diverse università e di differente formazione, che si riuniva attorno alla sezione storica del Dipartimento di Pedagogia dell'Ateneo milanese, dell'opportunità di proseguire nella strada intrapresa, allargando l'indagine ad altri rilevanti momenti della vita civile, culturale e religiosa del Paese. Seguirono così, nel corso degli anni Novanta, altri tre incontri di studio in cui, attraverso il ricorso a competenze storiche diverse, veniva fatta luce sulle forme dell'impegno educativo della Chiesa fra Restaurazione e fascismo<sup>17</sup>.

Nello stesso periodo, il gruppo milanese coordinato da Luciano Pazzaglia dava vita nel 1994 agli «Annali di storia dell'educazione e delle istituzioni scolastiche». L'opportunità di fondare il periodico era giustificata alla luce non solo della volontà di potere sviluppare, con continuità, le ipotesi di ricerca delineatesi negli incontri seminariali, ma anche della convinzione che, a fronte del crescente interesse della storiografia per le questioni educativo-scolastiche, fosse mancata fino ad allora in Italia una rivista specializzata che, confrontandosi anche con esperienze straniere, contribuisse al consolidamento dell'indagine storico-pedagogica. Gli «Annali di storia dell'educazione e delle istituzioni scolastiche» si sono presto imposti all'attenzione degli studiosi, e non solo di ambito pedagogico, per il rigore dei saggi pubblicati, per l'avvio di nuove piste di ricerca e per la valorizzazione dei luoghi (archivi, biblioteche, musei ecc.) deputati a custodire la memoria educativa.

In quello stesso periodo, il tema della conservazione e della valorizzazione della documentazione riguardante la storia pedagogica nazionale e della predisposizione di strumenti di analisi era oggetto dell'interesse di ricercatori di diversa estrazione e del personale di archivi e biblioteche. Nel 1994 usciva il primo volume della collana «Fonti per la storia della scuola» voluta dal Ministero per i beni culturali e ambientali con lo scopo di offrire raccolte di fonti documentarie sulla scuola depositate all'Archivio Centrale dello Stato<sup>18</sup>.

<sup>16</sup> *Chiesa e progetto educativo nell'Italia del secondo dopoguerra (1945-1958)*, Brescia, La Scuola, 1988.

<sup>17</sup> Cfr. L. Pazzaglia (ed.), *Chiesa e prospettive educative in Italia tra Restaurazione e Unificazione*, Brescia, La Scuola, 1994; Id. (ed.), *Cattolici, educazione e trasformazioni socio-culturali in Italia fra Otto e Novecento*, Brescia, La Scuola, 1999; Id. (ed.), *Chiesa, cultura e educazione in Italia tra le due guerre*, Brescia, La Scuola, 2003; in merito si vedano altresì: R. Sani, *Chiesa e prospettive educative in Italia dopo la Restaurazione: le suggestioni di un convegno*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 1, 1994, pp. 265-276; C. Ghizzoni, *Chiesa, educazione e società tra Otto e Novecento*, «Vita e Pensiero», vol. LXXIX, n. 10, ottobre 1996, pp. 704-715; Ead., *Chiesa, educazione e società tra le due guerre*, «Storia in Lombardia», vol. XX, n. 3, 2000, pp. 139-158.

<sup>18</sup> Ad oggi sono apparsi 7 volumi, l'ultima uscita è però datata 2005.

Negli stessi anni, sotto la direzione di Giorgio Chiosso, un'altra équipe si impegnava in un'opera di ricognizione di fonti importanti per la ricerca storico-pedagogica. Come già accennato, essa prendeva le mosse dall'esame dei fogli di carattere educativo editi in Italia. I risultati della ricerca apparvero in una serie di contributi, il primo del 1989, che culminava nella pubblicazione, quasi un decennio dopo, del denso repertorio delle riviste pedagogiche e scolastiche stampate nella penisola fra il 1820 e il 1943<sup>19</sup>. Questo lavoro ebbe il merito di fornire ai cultori della materia la fotografia di un'Italia scolastica e educativa non ancora nota e di mettere a disposizione un'ampia messe di notizie importanti per diversi filoni di ricerca: dall'indagine sugli insegnanti (formazione, stato giuridico e economico, associazionismo) alla ricostruzione della quotidianità della didattica e dunque dell'effettiva ricezione dei provvedimenti ministeriali, dall'esame dell'emergere nel corso del tempo di nuovi temi alla individuazione dei protagonisti della storia educativa del Paese fra Restaurazione e fascismo. Si trattava di una fotografia che non consentiva ancora di delineare chiaramente il volto di questi protagonisti (quali i direttori e i collaboratori delle riviste, ma anche gli editori e gli stampatori), ma che faceva uscire dall'oblio il loro nome e lo consegnava ai ricercatori affinché da lì partissero per continuare gli studi sulle vicende educative nazionali.

Proprio muovendo da questi risultati e sul modello dell'indagine condotta in Francia dall'INRP (*Institut National de Recherche Pédagogique*) con il coordinamento di Alain Choppin sui libri di testo stampati in quel Paese dal Settecento, Giorgio Chiosso con un nuovo gruppo di ricerca, in parte composto da coloro che già avevano lavorato ai periodici, si dedicava alla redazione del repertorio degli editori italiani che, nel corso dell'Ottocento e del Novecento, hanno pubblicato testi per le scuole. Frutto del lavoro sono *TESEO* e *TESEO '900*<sup>20</sup> che presentano un approccio multidisciplinare<sup>21</sup>, avvalendosi delle competenze di storici di diversa formazione, e costituiscono strumenti importanti per chi si interessi di storia dell'educazione, dell'editoria e della cultura. La mappatura delle imprese editoriali (1.054 le schede stilate in totale) restituisce

<sup>19</sup> Questi i testi dedicati alla stampa periodica educativa tutti curati da G. Chiosso: *Scuola e stampa nel Risorgimento. Giornali e riviste per l'educazione prima dell'Unità*, Milano, FrancoAngeli, 1989; *I periodici scolastici nell'Italia del secondo Ottocento*, Brescia, La Scuola, 1992; *Scuola e stampa nell'Italia liberale. Giornali e riviste per l'educazione dall'Unità a fine secolo*, Brescia, La Scuola, 1993; *La stampa pedagogica e scolastica in Italia (1820-1943)*, Brescia, La Scuola, 1997.

<sup>20</sup> G. Chiosso (dir.), *TESEO. Tipografi e editori scolastico-educativi dell'Ottocento*, Milano, Editrice Bibliografica, 2003; Id. (dir.), *TESEO '900. Editori scolastico-educativi del primo Novecento*, Milano, Editrice Bibliografica, 2008. Ma si vedano anche, sui libri di testo e sugli editori scolastici, il numero monografico degli «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 4, 1997; G. Chiosso (ed.), *Il libro per la scuola tra Sette e Ottocento*, Brescia, La Scuola, 2000; C. Betti (ed.), *Percorsi del libro per la scuola fra Otto e Novecento. La tradizione toscana e le nuove realtà del primo Novecento in Italia*, Firenze, Pagnini, 2004.

<sup>21</sup> E. Marazzi, *L'editoria scolastico-educativa e la ricerca storica. Il caso italiano*, «Società e Storia», n. 138, 2012, pp. 823-851.

un altro tassello della storia educativa nazionale, facendo luce, ad esempio, sulla costituzione e evoluzione delle discipline scolastiche, sulla traduzione nella concretezza della vita didattica, tramite il libro di testo e le scelte degli editori, del disegno culturale e pedagogico delineato a livello ministeriale.

L'analisi dei libri di testo editi in Italia è stata e è oggetto di ulteriori studi da parte di un altro polo, quello dell'Università degli Studi di Macerata. Il gruppo di ricerca, coordinato da Roberto Sani, tra i primi collaboratori delle indagini avviate da Chiosso dagli anni Ottanta, e tra cui spiccano anche Anna Ascenzi e Alberto Barausse dell'Università degli Studi del Molise, ha dato alle stampe alcuni ponderosi volumi che raccolgono la normativa sui libri di testo fra l'Unità e la fine del secondo conflitto mondiale. Il progetto perseguito non solo ha arricchito le conoscenze degli storici in ordine agli orientamenti della classe dirigente italiana circa la pubblicistica scolastica e i libri di testo<sup>22</sup>, ma ha anche contribuito a sollecitare l'attenzione sulla «materialità» della vita scolastica<sup>23</sup>.

Nel 2006, sempre il gruppo maceratese avviava un'altra impresa: in quell'anno usciva il primo numero della rivista «History of Education & Children's Literature», diretto da Roberto Sani. Sorto con l'intenzione di essere un luogo di promozione della ricerca inserito nel quadro internazionale<sup>24</sup>, il periodico ha riscosso l'apprezzamento degli studiosi anche stranieri per la qualità dei contributi pubblicati, l'ampiezza dei temi affrontati, la piena accettazione degli standard universalmente riconosciuti, l'ospitalità concessa a saggi di lingua non solo inglese e italiana, ma anche francese, spagnola, tedesca, portoghese<sup>25</sup>.

La riflessione qui proposta non sarebbe però completa, sia pure nella sua sinteticità, se non ricordasse che, nello stesso arco temporale considerato in questa sede, in seguito ai provvedimenti di riforma che hanno interessato l'università e il reclutamento del personale accademico, le cattedre di storia della pedagogia (sotto le diverse titolazioni ma tutte inerenti all'attuale settore

<sup>22</sup> Si vedano: A. Ascenzi, R. Sani (edd.), *Il libro per la scuola tra idealismo e fascismo. L'opera della Commissione centrale per l'esame dei libri di testo da Giuseppe Lombardo Radice ad Alessandro Melchiori (1923-1928)*, Milano, Vita e Pensiero, 2005; A. Barausse (ed.), *Il libro per la scuola dall'Unità al fascismo. La normativa sui libri di testo dalla Legge Casati alla Riforma Gentile (1861-1922)*, Macerata, Alfabetica, 2008; 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, 2009.

<sup>23</sup> In questo quadro si colloca anche il Convegno internazionale, promosso nel 2007 dall'Ateneo maceratese, su un'altra interessante fonte per la storia educativa, ovvero i quaderni di scuola: J. Meda, D. Montino, R. Sani (edd.), *School exercise books. A Complex Source for a History of the Approach to Schooling and Education in the 19<sup>th</sup> and 20<sup>th</sup> Centuries*, 2 voll., Firenze, Edizioni Polistampa, 2010.

<sup>24</sup> R. Sani, *History of Education & Children's Literature*, «History of Education & Children's Literature», vol. I, n. 1, 2006, pp. 3-7; ma si veda ora anche Id., *History of Education & Children's Literature (HECL) (Italy)*, in J.L. Hernández Huerta, A. Cagnolati, A. Diestro Fernández (edd.), *Connecting history of education. Scientific journals as international tools for a global word*, Salamanca, FahrenHouse, 2015, pp. 113-130.

<sup>25</sup> Bandini, *La dimensione internazionale della ricerca storico-educativa*, cit., pp. 61-62.

scientifico disciplinare M-PED/02) hanno conosciuto un indubbio aumento in seguito all'espansione numerica dei corsi di laurea afferenti alla Facoltà di Scienze della Formazione (cui di recente negli atenei statali sono subentrati i Dipartimenti di nuova istituzione). A tale ampliamento, come è stato notato<sup>26</sup>, non è sempre corrisposto un omogeneo e generalizzato progresso della ricerca in questo campo, limitandosi in taluni casi a tradursi nella produzione di sintesi, compendi ad uso della preparazione dei futuri addetti al mondo della formazione (insegnanti, educatori, pedagogisti), senza avere alle spalle, per periodi e aspetti della storia dell'educazione nazionale, propedeutici e faticosi lavori di scavo documentale e archivistico sul piano normativo e istituzionale. È indubbio però che la crescita degli insegnamenti di area storico-pedagogica erogati dalle università italiane con l'immissione di giovani ricercatori e docenti, formati nel nuovo clima di rinnovamento metodologico, ha significato l'avvio di nuove piste di ricerche che hanno contribuito a ampliare le indagini e a radicare la ricerca storico-educativa nei diversi atenei del Paese<sup>27</sup>.

In conclusione, credo appaia più chiaro quanto affermato agli inizi: la pubblicazione del *Dizionario Biografico dell'Educazione 1800-2000*, a cura di Giorgio Chiosso e Roberto Sani, che ha visto la collaborazione di oltre un centinaio di studiosi di diverse sedi universitarie, raccoglie ciò che la ricerca storico-educativa ha seminato nei decenni precedenti. Il censimento di educatori, insegnanti, scrittori di manuali e di libri per l'infanzia, politici e amministratori, intellettuali, benefattori, distinti in questo ambito in duecento anni di storia italiana (2.345 le voci biografate), non sarebbe stato possibile se non fossero stati compiuti studi sulla stampa periodica pedagogica e sui libri di testo nonché rigorose ricerche, tramite scavi in archivi e in biblioteche, su vicende, momenti, protagonisti e istituzioni della storia formativa del nostro Paese, o se i diversi filoni della ricerca storica non si fossero interessati della questione educativa inglobandola nelle analisi politiche, sociali, religiose, culturali.

Opera coraggiosa, portata avanti dai ricercatori coinvolti con un paziente e lungo lavoro di recupero delle fonti in un momento in cui, merita ricordarlo, il criterio quantitativo rappresenta uno dei parametri della valutazione della produzione scientifica, il *Dizionario* viene a affiancarsi agli strumenti di cui la ricerca storico-educativa si è dotata nel corso degli anni e dà un rilevante contributo alla sua crescita in termini qualitativi, nel solco delle iniziative avviate dagli anni Settanta. Il risultato raggiunto non solo rappresenta l'esito di una fase di sviluppo della storia della pedagogia e viene a colmare la mancanza

<sup>26</sup> Cfr. De Fort, *Storie di scuole, storia della scuola: sviluppi e tendenze della storiografia*, cit., pp. 61-63.

<sup>27</sup> Si tenga presente, ad esempio, la buona performance del s.s.d. M-PED/02 (Storia della Pedagogia) nella Valutazione della Qualità della Ricerca (VQR) 2004-2010: S. Polenghi, *L'ANVUR e le sue procedure di valutazione della ricerca. L'internazionalizzazione della ricerca storico-educativa: significato e possibili interpretazioni*, in Bandini, Polenghi (edd.), *Enlarging one's vision*, cit., pp. 17-28.

di rassegne biografiche organiche e aggiornate. Esso costituisce anche il punto di partenza da cui, da qui in avanti, chi si confronterà con questo settore e più in generale i ricercatori dovranno prendere le mosse per verificare, almeno, se la persona incontrata è stata censita e quali le fonti e la bibliografia da esaminare. Il *Dizionario* inoltre è ricco di suggestioni per nuove ricerche in quanto offre materiale poco noto per studi in campi ancora da indagare o meritevoli di ulteriori approfondimenti, quali, solo per citarne alcuni, la pedagogia speciale e emendativa, l'educazione fisica, il variegato mondo della produzione letteraria per la fanciullezza e la gioventù, l'istruzione professionale.

Tiziana Pironi

### 1. *Il Dizionario Biografico dell'Educazione alla luce dei Woman's studies*

Uno dei principali meriti del *Dizionario Biografico dell'Educazione* diretto da Giorgio Chiosso e Roberto Sani<sup>28</sup> è quello di tener conto del rinnovamento storiografico avvenuto negli ultimi vent'anni, ponendo in qualche modo rimedio a pesanti rimozioni avvenute in passato circa la presenza delle donne in analoghe opere a carattere enciclopedico<sup>29</sup>. Esso raccoglie, infatti, un discreto numero di profili femminili (510 su un totale di 2346 schede), molto differenziati tra loro anche in termini di notorietà, che hanno offerto un significativo contributo allo sviluppo della storia educativa oltre che culturale e civile del nostro Paese. Del resto, questo lavoro, esito di una pluriennale ricerca che ha coinvolto storici della pedagogia appartenenti a diverse sedi universitarie nasce dalla consapevolezza che figure ritenute «minori», ma non per questo meno importanti, vadano ad aggiungere ulteriori tasselli all'ampio affresco del panorama educativo in Italia<sup>30</sup>. Come evidenziano, nell'*Introduzione* all'opera, i curatori – Giorgio Chiosso e Roberto Sani – si è trattato di una ricerca nata dalla volontà «di restituire alla memoria collettiva un'immagine articolata e il più possibile esaustiva delle

<sup>28</sup> Chiosso, Sani (dir.), *Dizionario Biografico dell'Educazione 1800-2000*, cit.

<sup>29</sup> Occorre ricordare che attualmente è in corso un ampio lavoro di aggiornamento del famoso *Dizionario Biografico degli Italiani* (Treccani), con l'implementazione di schede dedicate alle donne, grazie alla collaborazione della Società Italiana delle Storiche. Da ricordare, al riguardo, l'iniziativa promossa e coordinata da Angiolina Arru e Raffaele Romanelli *I seminari del biografico: biografie femminili: la presenza delle donne nei dizionari biografici nazionali*, tenutasi il 18 giugno 2015 a Roma, presso l'Istituto dell'Enciclopedia Italiana.

<sup>30</sup> Sulle ragioni storiografiche da cui è scaturito il progetto: G. Chiosso, R. Sani, *Conservare la memoria. Per un dizionario biografico dell'educazione*, «History of Education & Children's Literature», vol. IV, n. 2, 2009, pp. 461-464.



variegata esperienze educative e scolastiche tra Otto e Novecento attraverso le biografie degli uomini e delle donne che ne sono stati gli artefici e i protagonisti»<sup>31</sup>. Da nord a sud, dalle aree più periferiche alle grandi realtà urbane, le personalità qui presentate danno vita ad una poliedrica pluralità di voci, in cui trovano spazio diversi profili di figure femminili – dalle educatrici e insegnanti di provincia alle scrittrici e pedagogiste note e meno note – offrendoci uno spaccato del panorama variegato e complesso del mondo dell'educazione in Italia, dal periodo preunitario al secondo dopoguerra.

Una presenza, quella femminile spesso taciuta, «rimossa», eppure vivacemente operativa, che a partire dal lavoro pionieristico di Tina Tomasi, teso a far luce sui cosiddetti «silenzi» dell'educazione, è stata fatta oggetto di indagine da parte di studiose italiane che, nel corso degli anni Ottanta, hanno sviluppato una riflessione pedagogica incentrata sulla categoria di «genere»<sup>32</sup>. Accogliendo la sfida degli *women's studies* è stata così rivendicata l'importanza della cultura di *genere* che, rifiutata per secoli in nome di una cultura universalmente neutra, in realtà maschile, si è venuta configurando come una dimensione centrale e ineludibile della ricerca storico-educativa (Becchi, Covato, Frasca, Giallongo, Leuzzi, Ulivieri ecc.)<sup>33</sup>. Ne è nato un lavoro storiografico teso a rivedere le precedenti categorie interpretative, cercando di individuare le ragioni dell'assenza delle donne e anche le modalità con le quali si è espressa la loro presenza<sup>34</sup>.

Nell'ambito della storia dell'educazione, si è cercato quindi di elaborare – come affermava Egle Becchi – una nuova ottica critico-interpretativa, che andasse oltre il puro ambito descrittivo, della semplice registrazione dei fenomeni (ad esempio l'accesso delle donne all'istruzione), col conseguente «rischio di un confinamento in un territorio storiografico separato, limitandosi a descrivere i luoghi e gli spazi di un universo femminile prima ignorato»<sup>35</sup>. Di qui la scoperta di nuove fonti, di nuovi punti di vista, di nuove ipotesi di lavoro che hanno sempre più distinto, nel corso di questi anni, le ricerche di molte studiose in campo storico-

<sup>31</sup> *Presentazione*, in Id., *Dizionario Biografico dell'Educazione*, cit., vol. I, p. IX.

<sup>32</sup> Per quanto riguarda l'Italia, non possiamo non ricordare, in merito alla storia delle donne, gli studi pionieristici, apparsi agli inizi degli anni Sessanta, di Franca Pieroni Bortolotti e di Paola Gaiotti, rispettivamente per l'emancipazionismo laico e per i movimenti femminili cristiani; nel contempo, per l'ambito storico-educativo, oltre al già citato contributo di Tina Tomasi, vanno ricordati anche gli studi di Dina Bertoni Jovine, volti a mettere in luce i percorsi scolastici discriminanti delle donne, in una prospettiva storiografica ancorata alla categoria dell'emancipazione.

<sup>33</sup> A livello internazionale è partire dagli anni Settanta, sull'onda del neofemminismo, che ci si interroga sulla possibile fondazione di una storia delle donne: C.N. Degler, *Is There a History of Women?*, London, Oxford University Press, 1975; K. Hausen (ed.), *Frauen suchen ihre Geschichte*, Munchen, Beck, 1983; M. Perrot (ed.), *Une histoire des femmes est-elle possible?*, Paris, Rivages, 1984.

<sup>34</sup> Al riguardo, si veda, tra gli altri, S. Ulivieri, *Educare al femminile. Una storia da scoprire*, Milano, Guerini e Associati, 2008.

<sup>35</sup> E. Becchi, *La formazione al femminile nella storia della donna*, in E. Beseghi, V. Telmon (edd.), *Educazione al femminile: dalla parità alla differenza*, Scandicci, La Nuova Italia, p. 4.

educativo. Studi che hanno sondato i meccanismi di formazione di bambine, donne, insegnanti, anche negli aspetti più informali, grazie soprattutto alle fonti autobiografiche (carteggi, diari ecc.)<sup>36</sup>. Si è trattato di un ambito di ricerca che ha trovato in diverse occasioni terreni di convergenza e di lavoro interdisciplinare con le indagini compiute da diverse storiche (Buttafuoco, Scattigno, Porciani, Soldani ecc.), le quali hanno dato vita nel 1989 alla Società Italiana delle Storiche<sup>37</sup>.

Da quel momento in poi, gli approcci interpretativi e le chiavi di lettura offerte dalla storia delle donne hanno rappresentato un indispensabile contributo, poiché – come ha scritto Gianna Pomata – rimettere in discussione «la marginalità delle donne rispetto alla storia ha contribuito a modificare il concetto di storia, abbattendo le barriere tra gli stessi ambiti disciplinari»<sup>38</sup>. Studi che, in ambito storico-educativo, hanno dissodato ulteriori terreni di ricerca, spesso inesplorati fino ad allora (diari, romanzi autobiografici, epistolari) per focalizzare, ad esempio, l'attenzione sulla soggettività di chi ha formato generazioni di alunne e di alunni, oltre che sulla costruzione dell'immaginario relativo al ruolo professionale esercitato<sup>39</sup>.

Proseguendo in tale direzione, alla luce di nuove fonti documentarie, è emersa una fitta e variegata schiera di personaggi femminili, fino ad allora sconosciuti. Negli anni successivi ha preso corpo un lavoro storiografico sempre più mirato a lumeggiare lo stretto legame tra storia dell'educazione di genere e storia sociale, grazie all'apporto di nuove generazioni di studiose e di studiosi<sup>40</sup>. Figure sconosciute in passato sono emerse sempre più dall'oblio, nell'indagare le cosiddette «reti di relazioni» (congressi, associazioni, movimenti, riviste, giornali ecc.), in cui la presenza femminile si è rivelata efficacemente operativa, soprattutto a partire dai decenni postunitari. Un merito particolare va riconosciuto ad Annarita Buttafuoco che avviato gli studi sul cosiddetto «femminismo pratico»,

<sup>36</sup> Tra i numerosi contributi al riguardo: A. Dolfi, N. Turi, R. Sacchetti (edd.), *Memorie, autobiografie e diari nella letteratura italiana dell'Ottocento e del Novecento*, Firenze, ETS, 2008; D. Demetrio, *Ricordare a scuola. Fare memoria e didattica autobiografica*, Roma-Bari, Laterza, 2000; M. Durst (ed.), *Identità femminili in formazione. Generazioni e genealogie delle memorie*, Milano, FrancoAngeli, 2000; S. Olivieri, I. Biemmi, *Storie di donne. Autobiografie al femminile e narrazione identitaria*, Milano, Guerini Scientifica, 2011.

<sup>37</sup> Si veda l'intensa attività promossa dalla Società italiana delle Storiche, attraverso convegni, seminari, scuole estive, congressi internazionali ([www.societàdellestoriche.it](http://www.societàdellestoriche.it)).

<sup>38</sup> G. Pomata, *Storia delle donne. Una questione di confine*, in N. Tranfaglia (dir.), *Il mondo contemporaneo*, 11 voll., Firenze, La Nuova Italia, 1978-1984, vol. II: *Gli strumenti della ricerca*, 1983, p. 1437.

<sup>39</sup> Sul rapporto tra formazione e professione, anche in ottica di genere, si rimanda in particolare a E. Becchi, M. Ferrari (edd.), *Formare alle professioni. Sacerdoti, principi, educatori*, Milano, FrancoAngeli, 2009.

<sup>40</sup> Si vedano tra i numerosi contributi: 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 fra Otto e Novecento*, Torino, SEI, 2008. Da ultimo si ricorda l'intensa attività svolta, da alcuni anni a questa parte, dal gruppo di lavoro *Educazione e studi di genere*, coordinato da Carmela Covato e Antonella Cagnolati, promosso all'interno della SIPED.

da lei interpretato come un movimento teso alla costruzione di uno stato sociale sulla base di quelle «*competenze femminili* (naturali o indotte dalla loro stessa posizione nella famiglia e nella società), e sulla possibilità di tradurle in strumenti, competenze utili per la gestione della cosa pubblica»<sup>41</sup>.

Sulla base di tali indagini, è stato messo in luce il lavoro delle emancipazioniste dei primi del Novecento, le quali proprio a partire dalla loro riflessione sullo stato di minorità in cui si trovavano costrette a vivere in quanto donne hanno coniugato le loro rivendicazioni con la sperimentazione di interventi sociali ed educativi nei confronti di quei soggetti che non godevano di alcuna rappresentanza, proprio per la loro condizione di estremo disagio e marginalità<sup>42</sup>. Indiscusse protagoniste di tale impegno per la tipica connotazione al «femminile» del lavoro di cura, di cui sono state per molto tempo destinatarie inconsapevoli, nonché scarsamente valorizzate, molte donne hanno così assunto tra Otto e Novecento una diffusa consapevolezza della cifra distintiva di una «cultura del materno» da esprimere sul terreno socio-educativo sulla base di un'estensione della cittadinanza a tutti quei soggetti che fino a quel momento ne erano esclusi<sup>43</sup>.

Le iniziative femminili si sono perciò rivelate di importanza cruciale per la formazione degli italiani e delle italiane nell'Italia postunitaria, agendo sia sul piano scolastico che extrascolastico<sup>44</sup>. Pensiamo non solo all'ampia schiera di maestre ed educatrici, ma anche alle tante filantrope, che hanno istituito asili, scuole ed educatori, rivolgendosi alle fasce più povere e disagiate della popolazione, dando vita in alcuni casi a nuove sperimentazioni educative<sup>45</sup>. Dunque, un variegato mondo femminile che ha agito a più livelli nel processo di modernizzazione del Paese<sup>46</sup>.

Al riguardo, il DBE si rivela un utile strumento – provvisto di indici suddivisi per professioni (distinte per genere), ambiti, regioni – dal quale è possibile ricostruire

<sup>41</sup> A. Buttafuoco, *Tra cittadinanza politica e cittadinanza sociale. Progetti ed esperienze del movimento politico delle donne in età liberale*, in G. Bonacchi, A. Groppi (edd.), *Il dilemma della cittadinanza. Diritti e doveri delle donne*, Roma-Bari, Laterza, 1993, p. 109. Da ricordare, anche, tra gli altri: D. Galliani, M. Salviati (edd.), *La sfera pubblica femminile*, Bologna, Clueb, 1992.

<sup>42</sup> Si vedano i due «casi» emblematici di Ersilia Bronzini Majno e di Maria Montessori, analizzati rispettivamente da A. Buttafuoco, *Le mariuccine. Storia di un'istituzione femminile: l'asilo Mariuccia*, Milano, FrancoAngeli, 1998; V.P. Babini, L. Lama, «Una donna nuova». *Il femminismo scientifico di Maria Montessori*, Milano, FrancoAngeli, 2000.

<sup>43</sup> Sulla marginalizzazione dei saperi femminili, relativi alla «cura», si veda in particolare E. Becchi, *Sapere delle istituzioni e sapere della soggettività: alcune riflessioni a proposito del sapere femminile*, in *Problèmes d'histoire de l'éducation*, Roma, Ecole française de Rome, 1988, pp. 35-43.

<sup>44</sup> Recentemente è uscita una sezione monografica dal titolo *Per una storia dell'educazione al "femminile"*, curata da Tiziana Pironi, dedicata al rapporto tra biografia e vita professionale in otto profili di educatrici in «Rivista di storia dell'educazione», vol. 1, n. 2, 2014.

<sup>45</sup> Si ricorda, ad esempio, il numero monografico a cura di C. Covato, L. Di Mauro, *Donne che hanno fatto l'Italia. Le educatrici*, «Legendaria», vol. XV, n. 87, 2011, pp. 3-41.

<sup>46</sup> Sul rapporto tra il femminismo di inizio Novecento e il processo di modernizzazione del Paese, mi permetto di segnalare: T. Pironi, *Femminismo ed educazione in età giolittiana. Conflitti e sfide della modernità*, Pisa, ETS, 2010.

una vera e propria mappatura delle molteplici iniziative sociali ed educative, messe in campo dalle numerose professioniste dell'educazione (dalle Società di Mutuo Soccorso per le operaie, alle scuole per le madri, agli asili per i lattanti ecc.), dando conto della dimensione regionale di tale fenomeno, al di là dell'eclatante «caso» lombardo, che per la sua rilevanza risulta essere il più ampiamente studiato fino ad oggi<sup>47</sup>. Così, per fare solo un esempio, dalle schede presenti nel Dizionario, risalta l'attività delle filantrope nella diffusione del froebelismo nelle diversificate realtà locali, tra le quali Elena Raffalovich Comparetti, Ernesta Galletti Stoppa, Maria Boorman Ceccarini, e altre ancora.

Questo Dizionario si rivela perciò uno buon punto di partenza per poter avviare ulteriori indagini sulle biografie di figure cosiddette «minori», a torto considerate marginali, in quanto hanno spesso agito in maniera carsica e perfino sotterranea nel promuovere battaglie per il rinnovamento educativo, o perlomeno hanno rappresentato un piccolo ma significativo tassello dell'ampio affresco dell'educazione diffusa nel nostro Paese. Scorrendo molte delle voci ivi raccolte è possibile cogliere le motivazioni alla base delle loro scelte, spesso nel tentativo di superare difficoltà dovute a pregiudizi e ostacoli opposti dall'ambiente circostante. Accanto ai tanti educatori, pedagogisti, emerge dunque un gran corteo femminile in cui l'educatrice si alterna alla scienziata, nota e meno nota, che ci consente di capire che nessuna vita è esemplare, ma tutte lo sono.

## 2. *Donne e professioni educative nella storia: le ragioni di un'assenza e di una marginalità*

Nonostante la continua crescita di interesse della ricerca storiografica per gli studi di storia delle donne, restano comunque molti gli aspetti inesplorati, rispetto alle tante professioniste dell'educazione ancora da portare alla luce. Il fatto che in questo Dizionario la loro presenza si attesti a meno di un quarto (510 su un totale di 2346 voci) sta a significare che si deve ancora proseguire nell'indagine, sondando sempre nuove fonti; appare oltremodo evidente che in un campo come quello scolastico ed educativo, considerato tipicamente «femminile», si rivela alquanto limitato il numero di coloro che hanno assunto un ruolo pubblico di rilievo<sup>48</sup>. Diventa perciò estremamente arduo reperirne

<sup>47</sup> Il «caso» lombardo si rivela essere il più studiato, anche alla luce del noto *Dizionario biografico delle donne lombarde: 568-1968*, a cura di R. Farina, Milano, Baldini & Castoldi, 1995. Sarebbe auspicabile che a livello regionale fossero promosse imprese analoghe, onde procedere a ricognizioni il più possibile esaustive delle donne che si sono impegnate nei diversi campi del sapere.

<sup>48</sup> Sul consolidarsi nel corso degli anni postunitari dell'equazione fra donne ed educazione: C. Covato, *Essere maestre in Italia, tra Otto e Novecento*, in M. Cavazza, P. Govoni, T. Pironi, *Eredi di Laura Bassi. Docenti e ricercatrici in Italia tra età moderna e presente*, Milano, FrancoAngeli, 2014, pp. 96-110.

notizie biografiche, in quanto l'impegno profuso da molte donne in campo sociale, di cui l'educazione si qualifica quale asse portante, è stato per lungo tempo scarsamente riconosciuto e valorizzato. L'estrema difficoltà che si ritrova nel reperimento di fonti relative alle figure femminili è un segno palese della scarsa visibilità del loro protagonismo, spesso messo a tacere da opposizioni e resistenze, sedimentate per lungo tempo, nell'attribuzione di riconoscimenti pubblici. Emblematica appare la testimonianza di Ida Baccini (1850-1911), la quale ricordava che ai suoi tempi «lo sviluppo della cultura femminile era così odiato» che se una donna voleva scrivere sui giornali doveva ricorrere a uno pseudonimo maschile<sup>49</sup>.

Se si procede, infatti, ad una analisi della suddivisione per categorie professionali, mettendo a confronto i due generi tra loro, risulta eclatante il numero ridotto di schede dedicate alle maestre (149) che si sono distinte a livello scolastico, rispetto a quelle dedicate invece ai maestri (443). È oltremodo significativo che, in una professione enfatizzata in senso «femminile» come quella magistrale, il numero delle insegnanti elementari che hanno assunto posizioni di rilievo appaia molto ridotto<sup>50</sup>. Ciò è stato ampiamente dimostrato dalla ricerca condotta da Alberto Barausse che ha messo in evidenza lo scarto esistente tra l'alta affluenza femminile alla professione magistrale e la limitata presenza delle insegnanti negli organismi direttivi delle associazioni di settore<sup>51</sup>.

Se poi mettiamo a confronto il numero delle professoresse (104) rispetto ai professori (797) – che figurano nel Dizionario – la forbice si allarga ancora di più, a riprova del fatto che, nella prima metà del Novecento, la professoressa ha trovato, a differenza del professore, notevoli difficoltà ad imporsi quale professionista competente nell'insegnamento liceale<sup>52</sup>. Basti pensare che nell'anno scolastico 1920-21, su un totale di 20.742 professori di scuola media superiore, le donne risultavano essere 7.133<sup>53</sup>. Per non parlare della sproporzione tra il numero delle

<sup>49</sup> I. Baccini, *La mia vita*, a cura e con *Introduzione* di L. Cantatore, Milano, Unicopli, 2004, p. 121.

<sup>50</sup> Sull'enfatizzazione della figura della «maestra», quale proseguimento della funzione materna, si rimanda in particolare al volume di C. Covato, *Un'identità divisa. Diventare maestra in Italia fra Otto e Novecento*, Roma, Archivio Guido IZZI, 1996. Alla fine dell'Ottocento, la femminilizzazione dell'insegnamento elementare si rivela un fenomeno così diffuso, tanto da essere inserita la voce *Maestra*, curata da Cleofe Pellegrini, in A. Martinazzoli, L. Credaro (dir.), *Dizionario illustrato di pedagogia*, 3 voll., Milano, Vallardi, 1899, vol. 2, pp. 589-592.

<sup>51</sup> A. Barausse, *L'Unione Magistrale Nazionale. Dalle origini al fascismo (1901-1925)*, Brescia, La Scuola, 2002. Sulle ragioni storiche relative alla disparità tra l'alta affluenza femminile all'insegnamento primario e lo scarso riconoscimento in termini professionali, si veda in particolare A. Giallongo, *La difficile vita delle insegnanti*, in A. Cagnolati (ed.), *Biografia e formazione. Il vissuto delle donne*, Simplicissimus Book Farm Srl, 2012, pp. 97-108 (allo stesso saggio si rimanda per un'ampia bibliografia di riferimento).

<sup>52</sup> Cfr. G. Di Bello, *La professionalizzazione delle insegnanti della secondaria*, in E. Becchi, M. Ferrari, *Formare alle professioni. Sacerdoti, principi, educatori*, Milano, FrancoAngeli, 2009, pp. 492-499.

<sup>53</sup> C. Covato, *Essere maestre in Italia, tra Otto e Novecento*, in Cavazza, Govoni, Pironi,

direttrici (76) e quello dei direttori (346), o delle ispettrici (30) a confronto del numero degli ispettori (203), sintomo anche questo del forte ostruzionismo che si è prolungato a lungo nei confronti dell'impegno professionale e delle aspirazioni di carriera delle insegnanti-donne<sup>54</sup>.

Si rivela molto esiguo il numero delle schede dedicate alle religiose (64), rispetto a quelle dei sacerdoti (424), nonostante sia stato ampiamente studiato il vasto impegno assunto, tra Otto e Novecento, dalle congregazioni religiose femminili sul versante assistenziale ed educativo<sup>55</sup>. Questo a riprova del fatto che se risulta possibile conoscere e approfondire gli studi sulle attività profuse dagli ordini religiosi, al contrario, è assai più difficile risalire alle singole biografie di suore e missionarie, obbedienti a una regola di vita ritirata, oltre che per le diffidenze, manifestate in molti casi dalle gerarchie ecclesiastiche, abbastanza restie a favorire la visibilità sociale del personale femminile religioso<sup>56</sup>. Dunque, ancor più in quest'ultimo caso, risultano notevoli le difficoltà che si incontrano nel reperire le fonti sulle donne o di cui loro stesse hanno lasciato traccia.

Sempre scorrendo il grafico da noi stilato, incrociando i dati relativi alle percentuali suddivise per genere e categorie professionali, può sorprendere che il numero dei filantropi (64) e delle filantrope (63) sia quasi equivalente<sup>57</sup>. Sono del resto note le conseguenze della legge Crispi del 1890 sulla riorganizzazione delle Opere Pie, che ammettendo le donne nei Consigli di amministrazione delle Congregazioni di Carità, ebbe evidenti ricadute sul riconoscimento pubblico dell'impegno filantropico femminile. Del resto, sono già alquanto numerosi gli studi che hanno indagato la filantropia femminile, come una di quelle attività che contraddistinguono maggiormente le donne agiate tra Otto e Novecento la cui condizione sociale libera dall'obbligo della riservatezza<sup>58</sup>. Risulta pure

*Eredi di Laura Bassi*, cit., p. 108.

<sup>54</sup> Al riguardo si rimanda in particolare a S. Olivieri (ed.), *Essere donne insegnanti. Storia, professionalità e cultura di genere*, Torino, Rosenberg & Sellier, 1996. Per quanto riguarda la figura della *direttrice didattica* – come osserva T. Bertilotti – «il fattore culturale dell'attitudine alla maternità, che aveva permesso l'ingresso all'insegnamento elementare è in seguito utilizzato per relegare le donne in ambiti marginali della professione, mettendo in atto una segregazione verticale proprio in un luogo – la scuola – dove prevale la presenza femminile» (T. Bertilotti, *Percorsi di studio e carriere nella scuola: le direttrici didattiche*, in G. Vicarelli (ed.), *Donne e professioni nell'Italia del Novecento*, Bologna, il Mulino, 2007, p. 201).

<sup>55</sup> Come scrive P. Gaiotti de Biase, «I primi segni di questa vitalità religiosa, di una congiuntura culturale femminile nuova, stanno nei numeri: le nuove fondazioni sono infatti 183 nell'Ottocento, contro le 8 del Cinquecento, le 15 del Seicento, le 20 del 700» (G. Gaiotti de Biase, *Protagonismo religioso ed emancipazione delle donne: una storia di lungo periodo*, in S. Bartoloni, *Per le strade del mondo. Laiche e religiose fra Otto e Novecento*, Bologna, il Mulino, 2007, p. 30).

<sup>56</sup> Per un approfondimento della questione, ed inoltre per l'ampia bibliografia riportata, si rimanda all'*Introduzione* di S. Bartoloni del sopracitato volume, pp. 9-21.

<sup>57</sup> Cfr. Pironi, *Femminismo ed educazione in età giolittiana. Conflitti e sfide della modernità*, cit., p. 35.

<sup>58</sup> Per l'avvio a tali studi il riferimento d'obbligo è A. Buttafuoco, *La filantropia come politica. Esperienze dell'emancipazionismo italiano nel Novecento*, in L. Ferrante, M. Palazzi, G. Pomata, *Ragnatele di rapporti. Patronage e reti di relazioni nella storia delle donne*, Torino, Rosenberg &

apprezzabile, da parte dei curatori del DBE, la distinzione effettuata tra benefattrici/ori e filantrope/i, nel tener conto che proprio quest'ultima categoria si fa promotrice, soprattutto agli albori del Novecento, di un'ottica incline al superamento della beneficenza, tradizionalmente intesa, favorendo lo sviluppo una cultura socio-educativa<sup>59</sup>.

Per quanto riguarda il dato relativo a coloro che si dedicano alla scrittura, sotto varie forme a valenza educativa, possiamo rilevare che il numero delle femmine (173) non è di molto inferiore a quello dei maschi (230). Da rilevare che la stretta interdipendenza tra la dimensione narrativa e la dimensione formativa è stata vissuta da molte donne come un vero e proprio strumento di autoeducazione, nel favorire una maggiore coscienza di se stesse<sup>60</sup>. È altresì noto che dalla seconda metà dell'Ottocento in poi la scrittura femminile va acquisendo una sempre maggiore visibilità, peraltro spesso destinata al pubblico infantile. Un discorso a parte merita infatti il settore della letteratura per l'infanzia: su un totale di 306 schede rilevate, le femmine impegnate in questo ambito risultano essere 148, a fronte di 158 maschi. Ed inoltre, come si può notare scorrendo le schede, buona parte delle narratrici per l'infanzia svolgono la professione di insegnanti: assumono in questo modo una certa rilevanza pubblica nell'accedere ad un mercato editoriale in costante fermento, e si rendono in molti casi promotrici di una fitta rete di bibliotechine circolanti e rurali<sup>61</sup>.

### Conclusioni

Questo dizionario, oltre a rivelarsi un utile strumento, atto a sollecitare ulteriori ricerche su figure femminili sconosciute e poco note (a conclusione di ogni scheda, oltre alla bibliografia, vengono riportate le fonti archivistiche), va pure considerato come un *work in progress*, suscettibile di nuove scoperte e quindi di ulteriori aggiornamenti, in quanto via via che si infittiscono gli studi di storia delle donne, si accresce sempre più il numero, nonché l'importanza,

Sellier, 1988, pp. 166-187.

<sup>59</sup> Uno snodo fondamentale si rivela il dibattito sviluppatosi all'interno della sezione *Assistenza e previdenza* del Congresso nazionale delle donne italiane (Roma, 1908), dove si pone in discussione il sistema della beneficenza, prospettandone una riorganizzazione in senso assistenziale e non più elemosiniera. Cfr. T. Pironi, *Femminismo ed educazione in età giolittiana. Conflitti e sfide della modernità*, cit., p. 47.

<sup>60</sup> Cfr. P. Gabrielli, *Mondo di carta. Lettere, autobiografie, memorie*, Siena, Protragon, 2000; L. Guidi, *Scritture femminili e storia*, Napoli, Cliopress, 2004; Cagnolati (ed.), *Biografia e formazione. Il Vissuto delle donne*, cit.

<sup>61</sup> Come scrive Antonella Cagnolati, «Dalla metà del secolo XIX, le narratrici acquistano visibilità, pubblicano su riviste le loro storie, puntano ad un nuovo mercato editoriale che si va configurando come 'letteratura per l'infanzia'» (A. Cagnolati, *Prefazione*, in Ead. (ed.), *Tessere trame, narrare storie. Le donne e la scrittura per l'infanzia*, Roma, Aracne, 2013, p. 10.

delle molte professioniste dell'educazione da portare alla luce. I due volumi che compongono l'opera rappresentano perciò uno stimolo a proseguire su questa strada di dissodamento di ulteriori fonti, onde approfondire, ad esempio, il rapporto tra biografia e vita professionale delle numerose personalità femminili che hanno popolato lo scenario educativo della nostra storia nazionale. Si tratterà in particolare di decifrare le motivazioni alla base delle loro scelte, i molti perché delle loro proposte e battaglie, facendo riferimento alla produzione autobiografica, così da far emergere l'intreccio tra la dimensione pubblica e quella privata, per mettere a fuoco le trame complesse, le modalità sottese, tramite cui spesso le donne hanno elaborato le loro autorappresentazioni, sottraendosi a definizioni già date o imposte. Nell'ottica di un superamento della dicotomia tra pubblico e privato, tra aspetti formali e informali dell'educazione, le fonti autobiografiche, incrociate con altre tipologie di documenti, si rivelano fondamentali per portare alla luce i segni, le tracce, gli indizi di un'esperienza umana, colta nella sua irripetibile unicità. La narrazione di sé, affidata alla pagina scritta, ha rappresentato infatti per molte donne un espediente sapientemente utilizzato per riflettere su se stesse, mostrando coraggio e consapevolezza per difendere i propri progetti o per proporre una visione autonoma del mondo. Una infinita polifonia di vissuti e percorsi formativi che nel dipanarsi della loro esperienza esistenziale, sfuggono ad un unico e totalizzante modello identitario del «femminile».

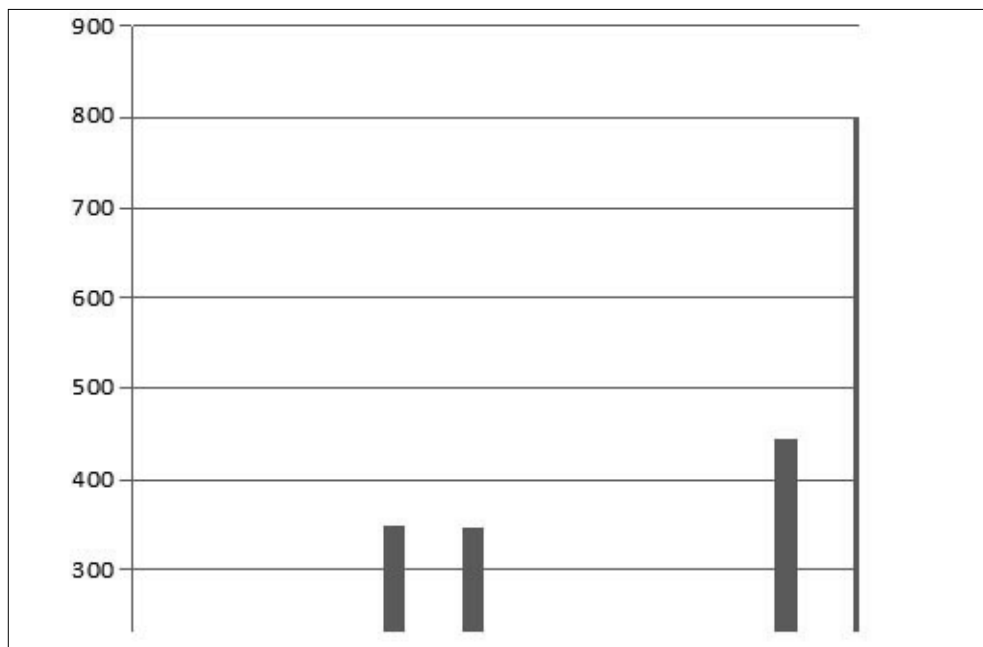
Tab. 1 Suddivisione numerica delle schede per genere e professioni.

Professioni	Maschi	Femmine
Amministratore Pubblico/Amministratrice Pubblica	156	4
Benefattore/Benefattrice	60	29
Bibliotecario/Bibliotecaria	6	1
Direttore/ Direttrice	346	76
Educatore/ Educatrice	344	158
Filantropo/ Filantropa	64	63
Illustratore/ Illustratrice	17	2
Ispettore/ Ispettrice	203	30
Maestro/ Maestra	443	149
Professore/ Professoressa	797	104
Professore Universitario/ Professoressa Universitaria	322	16
Scrittore/ Scrittrice	230	173
Traduttore/ Traduttrice	60	61
Uomo Politico/ Donna In Politica	188	14
Sacerdote/Religiosa	424	64

Fonte: Elaborazione dati DBE



Tab. 2. Distribuzione delle schede per genere e professioni.



Fonte: Elaborazione dati DBE

## Anna Ascenzi

### 1. *La Storia della letteratura per l'infanzia nel Dizionario Biografico dell'Educazione*

La recente pubblicazione, per i tipi dell'Editrice Bibliografica di Milano, del *Dizionario Biografico dell'Educazione* diretto da Giorgio Chiosso e Roberto Sani<sup>62</sup> costituisce, anche per gli studiosi di Storia della letteratura per l'infanzia, un evento di indubbia importanza, in particolare, come cercherò di porre in luce in queste brevi note, per il ruolo attribuito alla disciplina e per il notevole spazio riservato ai profili biografici non solamente dei protagonisti e degli scrittori di prima grandezza, ma anche di tanti autori di libri per l'infanzia e la gioventù che, sulla base di una valutazione attinente l'esclusivo valore estetico e letterario delle loro

<sup>62</sup> Chiosso, Sani (dir.), *Dizionario Biografico dell'Educazione 1800-2000*, cit.

opere, sono stati a torto considerati «minori» e, per ciò stesso, fino a tempi recenti, colpevolmente ignorati o quanto meno trascurati dagli storici dell'educazione<sup>63</sup>.

Per altri versi, sembra di poter dire che, proprio alla luce dell'attenzione ad essa riservata tra le colonne del *Dizionario Biografico dell'Educazione*, è possibile cogliere la vera e propria centralità che la letteratura per l'infanzia è venuta assumendo negli ultimi decenni quale fonte e strumento per una più ampia e incisiva comprensione dei più generali processi culturali e formativi che hanno caratterizzato il nostro Paese negli ultimi due secoli.

Il punto di vista degli storici della letteratura per l'infanzia, a questo riguardo, le loro analisi e ricostruzioni, la ricchezza e poliedricità dei risultati delle indagini da essi compiute negli ultimi decenni, hanno trovato piena accoglienza nel *Dizionario Biografico dell'Educazione*, contribuendo in misura rilevante alla realizzazione dell'ambizioso obiettivo di «restituire alla memoria collettiva – per dirla con le parole di Giorgio Chiosso e Roberto Sani – un'immagine articolata e il più possibile esaustiva delle variegate esperienze educative e scolastiche tra Otto e Novecento attraverso le biografie degli uomini e delle donne che ne sono stati gli artefici e i protagonisti»<sup>64</sup>.

Non a caso, rispetto ai dizionari e agli altri repertori biografici del passato (e ricordo qui, oltre ai più datati testi di Martinazzoli e Credaro<sup>65</sup> e di Codignola<sup>66</sup>, anche la recente *Enciclopedia Pedagogica* diretta da Mauro Laeng<sup>67</sup>), quello che qui presentiamo s'impone all'attenzione degli studiosi per almeno quattro caratteristiche essenziali:

- a. il notevole numero di profili biografici dedicati a scrittori per l'infanzia e la gioventù: ben 303 sul totale di 2345, oltre il 10% dunque;
- b. l'approccio rigorosamente storiografico adottato dai collaboratori del *Dizionario Biografico dell'Educazione* nella stesura dei diversi profili biografici, la maggior parte dei quali ha richiesto nuove e più accurate e approfondite indagini, spesso fondate su fonti archivistiche e a stampa in precedenza trascurate o del tutto ignorate;
- c. la ricomprensione tra gli scrittori per l'infanzia e la gioventù anche degli autori di libri di testo e di manuali scolastici, a torto considerati, in passato – sulla base di criteri esclusivamente estetici – meri compilatori di opere prive di specifica valenza letteraria e di autentica creatività autoriale, e per ciò stes-

<sup>63</sup> Cfr. A. Ascenzi, *Children's literature as a "source" for the history of cultural and educational processes*, «History of Education & Children's Literature», vol. VII, n. 2, 2012, pp. 497-514.

<sup>64</sup> Si veda al riguardo Chiosso, Sani, *Conservare la memoria. Per un dizionario biografico dell'educazione*, cit., pp. 467-470.

<sup>65</sup> Martinazzoli, Credaro (dir.), *Dizionario illustrato di pedagogia*, cit.

<sup>66</sup> E. Codignola (dir.), *Serie 38: Pedagogisti ed educatori*, in A. Ribera (dir. gen.), *Enciclopedia biografica e bibliografica italiana*, Roma-Milano, Istituto editoriale italiano Tosi, 1939.

<sup>67</sup> M. Laeng (dir.) *Enciclopedia pedagogica*, Brescia, La Scuola, 1989-1994 e 2003, 6 voll. + Appendice A-Z.

so ritenute di rango inferiore ed escluse dal canone dell'autentica letteratura destinata a fanciulli e ragazzi<sup>68</sup>.

- d. Il recupero di figure particolarmente importanti ai fini di una storia organica e a tutto tondo della letteratura per l'infanzia nell'Italia degli ultimi due secoli, quali ad esempio gli illustratori di libri per l'infanzia, i traduttori di opere in lingua straniera, i direttori e compilatori di riviste e fumetti per bambini e ragazzi, anch'essi colpevolmente trascurati, quando non del tutto ignorati dalla storiografia pedagogica d'impianto tradizionale<sup>69</sup>.

Relativamente agli *autori*, ad esempio, accanto a quelli di maggiore notorietà e importanza – da Ida Baccini a Luigi Bertelli (*Vamba*), da Cesare Cantù a Luigi Capuana, da Edmondo De Amicis, a Carlo Lorenzini (*Collodi*), a Luigi Alessandro Parravicini, a Gianni Rodari, a Emilio Salgari, e a Francesco Soave – nel *Dizionario Biografico dell'Educazione* è dedicato un amplissimo spazio alle figure rappresentative e ai cosiddetti scrittori minori, talvolta noti solo in ambito regionale o locale, molti dei quali, tuttavia, hanno esercitato un largo influsso nella costruzione dell'immaginario dell'infanzia e sull'infanzia nel loro tempo. È il caso, a puro titolo esemplificativo, di personalità quali: Giana Anguissola, Ester Bezzola Boni, Evelina Cattermole (*Contessa Lara*), Pietro Dazzi, Teresa Mannucci De Gubernatis, Giuseppe Fanciulli, Onorato Fava, Ida Finzi (*Haidée*), Pasquale Fornari, Olindo Giacobbe, Paola Lombroso Carrara (*Zia Mariù*), Ugo Mioni, Felicita Morandi, Salvatore Muzzi, Emma Perodi, Felicita Pozzoli, Luigi Sailer, Maria Savi Lopez, Virginia Tedeschi Treves (*Cordelia*), Anna Vertua Gentile e Maria Viani-Visconti Cavanna.

Di grande interesse, come si è già ricordato, è lo spazio attribuito ai traduttori e agli illustratori delle opere per l'infanzia e la gioventù. Tra i primi, ancora solo a titolo esemplificativo, ricordo i puntuali e documentati profili di: Giovanni Bitelli, Lucilla Calfus, Mery Tibaldi, Eugenia Cimmino, Vittoria Clama, Emilia Dandolo, Camilla Del Soldato, Vincenzo Errante, Anna Franchi, Rosa Fumagalli, Daria Malaguzzi, Fernando Palazzi e Gustavo Strafforello. Tra i secondi, ossia gli illustratori, il *Dizionario Biografico dell'Educazione* annovera i profili di: Giuseppe Eugenio Chiorino, Ugo Finozzi, Giovanni Manca, Bruno Munari, Attilio Mussino, Enrico Novelli, Antonio Rubino, Filiberto Scarpelli, Roberto Sgrilli e Sergio Tofano.

Infine, amplissima e del tutto originale è la rilevanza accordata agli autori di libri di lettura e di manuali scolastici, tra i quali ci limitiamo qui a segnalare: Raffaele Altavilla, Vincenzina Battistelli, Ildebrando Bencivenni, Pierina

<sup>68</sup> Cfr. A. Ascenzi, *The history of school manuals and textbooks in Italy. An evaluation and new research perspectives*, «History of Education & Children's Literature», vol. VI, n. 2, 2011, pp. 405-423.

<sup>69</sup> A puro titolo esemplificativo, mi limito qui a segnalare: S. Assirelli, *Paradigma Bemporad. Percorsi e linee evolutive dell'illustrazione del libro per l'infanzia in Italia tra Ottocento e Novecento*, Firenze, Nerbini, 2012; e J. Meda (ed.), *Falce e fumetto. Storia della stampa periodica socialista e comunista per l'infanzia in Italia (1893-1965)*, Firenze, Nerbini, 2013.

Boranga, Giovanni Capodivacca, Alberto Cioci, Angelo Colombo, Dante Dini, Anna e Rosa Errera, Angiolo Silvio Novaro, Giuseppe Ernesto Nuccio, Ferruccio Orsi, Maria Pezzè Pascolato, Ulisse Poggi, Giulio Tarra, Pietro Thouar, Gherardo Ugolini.

## 2. *Il Dizionario Biografico dell'Educazione: il punto di arrivo di una stagione di rinnovamento*

A mio personale avviso, il Dizionario Biografico dell'Educazione curato da Giorgio Chiosso e Roberto Sani costituisce il *punto di arrivo* di una stagione di profondo rinnovamento della ricerca nel settore della Storia della letteratura per l'infanzia. Il punto di arrivo di una parabola pluriennale nel corso della quale questa disciplina, abbandonate gradualmente le un po' stantie e sterili discussioni di carattere epistemologico sulla natura stessa di una «letteratura per l'infanzia», sul suo specifico oggetto d'indagine e sulla sua metodologia<sup>70</sup>, ha cominciato a dotarsi di una strumentazione e di un programma di ricerca di carattere propriamente storiografici.

Per chi volesse mettere a fuoco la situazione di partenza, ovvero la dimensione involuta e del tutto sterile in cui si poneva la disciplina ancora al principio degli anni Novanta, basterebbe qui richiamare la voce *Letteratura giovanile* pubblicata proprio nel 1990 da Anna Maria Bernardinis nella *Enciclopedia pedagogica* diretta da Mauro Laeng. Una voce articolata e ricca di riferimenti dotti, ma tutta giocata sulle questioni di natura epistemologica e sulle implicazioni pedagogiche di un sapere che appariva del tutto disincarnato e privo di una reale presa sulla vita sociale e sulla storia dei processi culturali e formativi: in buona sostanza, una disciplina più ripiegata su se stessa e sulle proprie – vere o presunte – fragilità e contraddizioni epistemiche, che un sapere in grado di contribuire alla comprensione della realtà e della sua evoluzione storica<sup>71</sup>.

Quali allora le tappe del rinnovamento a cui accennavo sopra?

Nel 1996, com'è noto, Pino Boero e Carmine De Luca davano alle stampe, per i tipi dell'editore Laterza, il ben noto e fortunato volume *La letteratura per l'infanzia*, con il quale proponevano agli specialisti e ai cultori della disciplina i risultati di un lungo e cospicuo lavoro di ricerca volto a presentare, in maniera organica e cronologicamente ordinata, autori ed opere, temi e problemi della letteratura italiana per l'infanzia e la gioventù, della quale si ricostruivano in

<sup>70</sup> Cfr. A. Ascenzi (ed.), *La letteratura per l'infanzia oggi. Questioni epistemologiche, metodologie d'indagine e prospettive di ricerca*, Milano, Vita e Pensiero, 2002.

<sup>71</sup> A.M. Bernardinis, *Letteratura giovanile*, in Laeng (dir.), *Enciclopedia pedagogica*, cit., vol. IV, cc. 6717-6732.

prospettiva storica l'evoluzione e gli sviluppi fatti registrare dall'Unità agli anni Novanta del secolo XX<sup>72</sup>.

In quel volume, gli autori, volendo illustrare, in sede di presentazione, i connotati specifici dell'opera, ovvero le peculiarità e le coordinate fondamentali della loro ricerca, sottolineavano proprio il fondamentale ruolo esercitato dalla variegata pubblicistica esaminata nella costruzione dell'immaginario individuale e collettivo «della» e «sulla» età infantile e giovanile e nelle pratiche educative destinate ai minori.

La novità strutturale, e dunque qualitativa, offerta dal testo di Boero e De Luca risiedeva sostanzialmente nell'utilizzo di un'ottica pluridisciplinare (storica, pedagogica, linguistico-letteraria, ecc.), attraverso la quale, muovendo da un'istanza primaria di contestualizzazione, si puntava a ricostruire le vicende e gli sviluppi della letteratura per l'infanzia e la gioventù nel quadro più ampio della storia socio-culturale e della storia dell'educazione.

L'attenzione rivolta agli autori e ai destinatari delle opere (un'attenzione che per la prima volta riservava ampio spazio, oltre che alla narrativa, anche alla manualistica scolastica costituita dai libri di lettura) rivelava l'intento di ricostruire l'evoluzione della letteratura per l'infanzia e la gioventù non solo come un evento linguistico-letterario, ma anche come fenomeno storico-educativo strettamente connesso con i più generali processi di alfabetizzazione e di acculturazione di massa e con le dinamiche, caratteristiche dell'Otto e del Novecento italiano ed europeo, di edificazione di un immaginario collettivo.

Sotto certi aspetti, dunque, il lavoro di Boero e De Luca ha finito per rappresentare uno spartiacque rispetto alla fase precedente e, nel contempo, l'espressione più organica e storiograficamente avvertita di un nuovo modo di guardare alla letteratura per l'infanzia e alla sua storia.

Ma un'opera come la laterziana *La letteratura per l'infanzia* non rappresentava naturalmente un fatto accidentale o episodico, quasi un fulmine a ciel sereno: essa, anzi, costituiva per certi versi l'epifania di un processo dalle caratteristiche e dalla portata più generali, prodottosi proprio a partire dagli anni Ottanta e destinato a connotare l'intero trentennio successivo. In questo arco di tempo, infatti, sono inesorabilmente tramontati (o, se si vuole, sono stati fortemente ridimensionati) i due presupposti fondamentali attorno a cui ruotava la tradizionale ricerca nel settore.

Il primo di essi stabiliva che la letteratura per l'infanzia e la gioventù, in quanto universo di fenomeni linguistico-letterari, poteva e doveva essere letta e interpretata solo ed esclusivamente con gli stessi strumenti e le stesse metodologie di indagine applicate a qualsiasi altro genere letterario.

Il secondo, deduttivamente legato al precedente, ma ancora più radicato nel comune sentire, e dunque ancor più difficile da scardinare, giungeva a classificare

<sup>72</sup> P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, Laterza, 2009 (il testo ha avuto numerose ristampe e riedizioni).

la storia della letteratura per l'infanzia e la gioventù pressoché esclusivamente come una sorta di indispensabile e prezioso segmento della formazione e del bagaglio culturale di coloro che si preparavano a svolgere ruoli e funzioni di carattere educativo o di animazione dell'infanzia e della gioventù.

In buona sostanza, come nei vecchi e gloriosi istituti magistrali di gentiliana memoria, era non solo opportuno, ma quasi indispensabile che i futuri insegnanti, formatori e animatori giovanili conoscessero a fondo le belle storie di Pinocchio, di De Amicis, di Vamba, nonché le filastrocche di Rodari e, nel contempo, le gallerie di personaggi e vicende (con gli annessi significati morali, modelli educativi e istanze valoriali) che la letteratura per l'infanzia degli ultimi due secoli aveva lasciato in eredità. E ciò al fine di attingere a tale ricco patrimonio per affinare le rispettive professionalità e l'approccio ai problemi attuali.

Contro quest'ultima interpretazione, che confinava di fatto la storia della letteratura per l'infanzia nel novero delle «discipline ancellari» per la formazione professionale si era validamente espresso, sia pure in modo indiretto, uno studioso del calibro di Antonio Faeti, il cui tentativo di restituire dignità culturale e consistenza epistemologica a tale ambito di studi, aveva trovato espressione, in quegli anni, in due testi particolarmente incisivi, quali *Guardare le figure* (1972) e *Letteratura per l'infanzia* (1977)<sup>73</sup>.

In questa sede, tuttavia, è opportuno sottolineare che un merito non secondario della ricerca condotta dallo studioso bolognese è stato quello di operare non solo per un recupero culturale della letteratura per l'infanzia in sé, ma anche – e a mio avviso soprattutto – per un'effettiva valorizzazione della sua storia, da lui considerata come un capitolo fondamentale della più generale storia della cultura e del costume sociale e civile degli italiani.

Non solo: era implicito, nell'approccio faetiano, che l'analisi di un simile complesso prodotto obbligasse lo studioso a indagare non solamente sulla biografia e personalità dell'autore, ma anche sui modelli che ispiravano l'illustratore, il grafico, lo stesso editore dell'opera; e che di quest'ultima si desse ragione non solamente sotto il profilo estetico-letterario, ma anche (in modi volta per volta differenti) come specchio ed espressione di un contesto etico-civile e culturale, ovvero che lo studioso ne lumeggiasse le caratteristiche della trasmissione di determinati valori e l'incidenza sulla mentalità e l'immaginario collettivo.

Allo stesso modo, l'originale itinerario di recupero di una tradizione letteraria ed educativa riletta nel quadro della temperie culturale otto-novecentesca, avviato da Renata Lollo con il saggio *Sulla letteratura per l'infanzia* (2003), testimonia la pluralità di voci e di apporti di cui si nutre la recente storiografia sulla letteratura infantile e giovanile<sup>74</sup>.

<sup>73</sup> A. Faeti, *Guardare le figure*, Torino, Einaudi, 1972; Id., *Letteratura per l'infanzia*, Firenze, La Nuova Italia, 1977.

<sup>74</sup> R. Lollo, *Sulla letteratura per l'infanzia*, Brescia, La Scuola, 2003. Si veda anche Ead. (ed.),

Occorre peraltro sottolineare che ulteriori e incisivi stimoli ad una riconsiderazione della storia della letteratura per l'infanzia come «fonte» per la storia dei processi culturali e formativi sono venuti, nel corso degli ultimi decenni, proprio da quegli storici della cultura e dell'educazione che hanno via via scoperto l'importanza e il valore tutt'altro che settoriale o secondario, di fonti come quelle letterarie riferite al mondo dell'infanzia e della gioventù.

Mi piace, in questa sede, richiamare, sia pure per rapidi cenni, il lavoro di Franco Cambi e Simonetta Ulivieri sulla *Storia dell'infanzia nell'Italia liberale*<sup>75</sup>; gli atti del seminario di studi interdisciplinari sul tema *Il bambino nella storia*, promosso a Perugia nel 1991 dal gruppo di ricerca coordinato da Maria Cristina Giuntella<sup>76</sup>; i contributi di Franco Cambi e Roberto Sani raccolti nel volume *Infanzia, educazione e società in Italia tra Otto e Novecento*<sup>77</sup>; nonché le stimolanti ricerche date alle stampe negli ultimi anni da studiosi quali Simonetta Polenghi<sup>78</sup>, Davide Montino<sup>79</sup> e Antonio Gibelli<sup>80</sup>.

Più recentemente un ulteriore impulso all'approfondimento di tale filone di studi, ormai connotato secondo una prospettiva compiutamente internazionale, è venuto dal folto gruppo di ricercatori collegato alla rivista «History of Education & Children's Literature», nella quale accanto ai lavori di specialisti affermati – dai già ricordati Pino Boero e Renata Lollo a Mariella Colin<sup>81</sup> e a

*Il «Corriere dei piccoli» in un secolo di riviste per ragazzi*, Milano, Vita e Pensiero, 2009.

<sup>75</sup> F. Cambi, S. Ulivieri, *Storia dell'infanzia nell'Italia liberale*, Firenze, La Nuova Italia, 1988.

<sup>76</sup> M.C. Giuntella, I. Nardi (edd.), *Il bambino nella storia*, Napoli, ESI, Napoli, 1993.

<sup>77</sup> F. Cambi, *L'infanzia e la sua storia: un problema storiografico* e R. Sani, *L'educazione dell'infanzia nella storia. Interpretazioni e prospettive di ricerca*, in L. Caimi (ed.), *Infanzia, educazione e società in Italia tra Otto e Novecento*, Sassari, EDES, 1997, pp. 11-19 e 21-56.

<sup>78</sup> S. Polenghi, *Fanciulli soldati. La militarizzazione dell'infanzia abbandonata nell'Europa moderna*, Roma, Carocci, 2003.

<sup>79</sup> D. Montino, *Libri e giovani lettori tra XIX e XX secolo: un percorso di tipo qualitativo*, «History of Education & Children's Literature», vol. II, n. 1, 2007, pp. 299-322; Id., *Le tre Italie di Giuseppe Fanciulli. Educazione e letteratura infantile nel primo Novecento*, Torino, SEI, 2009; Id., *Giuseppe Fanciulli negli anni de «Il Giornalino della Domenica»*, *Infanzia, giornalismo e politica*, «History of Education & Children's Literature», vol. VI, n. 1, 2011, pp. 305-317.

<sup>80</sup> A. Gibelli, *Il popolo bambino. Infanzia e nazione dalla Grande Guerra a Salò*, Torino, Einaudi, 2005.

<sup>81</sup> M. Colin, *L'âge d'or de la littérature d'enfance et de jeunesse italienne. Des origines au fascisme*, Caen, Presses Universitaires de Caen, 2005; Ead., *Cent ans de Cuore en France: édition, traduction, lecture*, «History of Education & Children's Literature», vol. I, n. 1, 2006, pp. 83-103; Ead., *La letteratura per l'infanzia e la ricerca: indicazioni per una prima ricognizione in campo internazionale*, «History of Education & Children's Literature», vol. II, n. 1, 2007, pp. 445-451; Ead., *L'Italie et les Italiens vus par la littérature enfantine, entre Second Empire et Troisième République*, «History of Education & Children's Literature», vol. III, n. 1, 2008, pp. 199-215; Ead., *«Les enfants de Mussolini». Littérature, livres, lectures d'enfance et de jeunesse sous le fascisme. De la Grande Guerre à la chute du régime*, Caen, Presses Universitaires de Caen, 2010; Ead., *Un Cuore azzurro, un Cuore rosa: da De Amicis a Haydée nell'Italia liberale*, «History of Education & Children's Literature», vol. IX, n. 1, 2014, pp. 487-508.

Sabrina Fava<sup>82</sup>, da Lorenzo Cantatore<sup>83</sup> a Dorena Caroli (con i suoi innovativi studi sulla storia della letteratura per l'infanzia in Russia)<sup>84</sup> – hanno trovato spazio anche gli innovativi contributi di giovani studiosi quali Silvia Assirelli<sup>85</sup>, Ilaria Mattioni<sup>86</sup>, Alberto Carli<sup>87</sup> e Fabiana Loparco<sup>88</sup>.

All'approfondimento di quello che possiamo ormai considerare a tutti gli effetti un ambito particolare della letteratura per l'infanzia e la gioventù, ossia la manualistica scolastica e i libri di testo, sono stati dedicati, negli ultimi decenni, lavori importanti. Penso ad esempio al volume *Da plebe a popolo. L'educazione popolare nei libri di scuola dall'Unità alla Repubblica* di Marcella Bacigalupi e Piero Fossati<sup>89</sup>, al saggio di Silvio Lanaro su *Il Plutarco italiano: l'istruzione del popolo dopo l'Unità*, edito nel 1981<sup>90</sup>, al più ampio contributo in materia offerto dallo stesso Lanaro nel volume *Nazione e lavoro. Saggio sulla cultura borghese in Italia*<sup>91</sup>; infine, alle vaste e organiche ricerche condotte, nell'ultimo

<sup>82</sup> S. Fava, *Emilia Formíggini Santamaria. Dagli studi storico-pedagogici alla letteratura per l'infanzia*, Brescia, La Scuola, 2002; Ead., *Percorsi critici di letteratura per l'infanzia tra le due guerre*, Milano, Vita e Pensiero, 2004; Ead., *Tra libri e riviste: l'apporto della casa editrice Formiggini alla letteratura per l'infanzia*, «History of Education & Children's Literature», vol. I, n. 1, 2006, pp. 267-285; Ead., *Dal «Corriere dei Piccoli». Giana Anguissola scrittrice per ragazzi*, Milano, Vita e Pensiero, 2009; Ead., *La letteratura per l'infanzia tra fine Ottocento e Grande Guerra: un terreno di contesa o di conciliazione tra laici e cattolici?*, «History of Education & Children's Literature», vol. VI, n. 2, 2011, pp. 203-227.

<sup>83</sup> L. Cantatore (ed.), *Ottocento fra casa e scuola. Luoghi, oggetti, scene della letteratura per l'infanzia*, Milano, Unicopli, 2013.

<sup>84</sup> D. Caroli, *Cittadini e patrioti. Educazione, letteratura per l'infanzia e costruzione dell'identità nazionale nella Russia sovietica*, Macerata, eum, 2011.

<sup>85</sup> S. Assirelli, *La rappresentazione dell'infanzia nelle copertine de «Il Giornalino della Domenica» (1906-1911). Un itinerario iconografico*, «History of Education & Children's Literature», vol. VI, n. 1, 2011, pp. 145-177; Ead., *Paradigma Bemporad. Percorsi e linee evolutive dell'illustrazione del libro per l'infanzia in Italia tra Otto e Novecento*, Firenze, Nerbini, 2012.

<sup>86</sup> I. Mattioni, *Editoria periodica salesiana ed educazione femminile nell'Italia del secondo dopoguerra. Il caso di «Primavera. Rivista per giovanette» (1950-1979)*, «History of Education & Children's Literature», vol. II, n. 2, 2007, pp. 291-313; Ead., *Da grande faro la santa. Modelli etici e valori religiosi nella stampa cattolica femminile per l'infanzia e la gioventù (1950-1979)*, Firenze, Nerbini, 2011.

<sup>87</sup> A. Carli, *La nuova veglia di lettura, la fiaba «moderna» e l'Italia unita. Ferdinando Martini, Emma Perodi e Luigi Capuana tra oralità e scrittura*, «History of Education & Children's Literature», vol. I, n. 2, 2006, pp. 131-149; Id., *Il volto nascosto della fiaba italiana di secondo Ottocento*, «History of Education & Children's Literature», vol. II, n. 1, 2007, pp. 217-239; Id., *L'ispettore di Mineo. Luigi Capuana fra letteratura per l'infanzia, scuola e università*, Villasanta, Limina Mentis, 2011.

<sup>88</sup> F. Loparco, *I bambini e la guerra. Il «Corriere dei Piccoli» e il primo conflitto mondiale (1915-1918)*, Firenze, Nerbini, 2011; Ead., *«Boys of England», «The Boy's Own Paper», and the English influence in the Italian «Giornale per i Bambini»*, «History of Education & Children's Literature», vol. IX, n. 2, 2014, pp. 419-444.

<sup>89</sup> M. Bacigalupi, P. Fossati, *Da plebe a popolo. L'educazione popolare nei libri di scuola dall'Unità d'Italia alla Repubblica*, Firenze, La Nuova Italia, 1986.

<sup>90</sup> S. Lanaro, *Il Plutarco italiano: l'istruzione del «popolo» dopo l'Unità*, in C. Vivanti (ed.), *Storia d'Italia. Annali 4: Intellettuali e potere*, Torino, Einaudi, 1981, pp. 553-587.

<sup>91</sup> S. Lanaro, *Nazione e lavoro. Saggio sulla cultura borghese in Italia 1870-1925*, Venezia, Marsilio, 1979.



quindicennio, sull'editoria scolastica ed educativa e sui libri per la scuola dal gruppo di ricerca coordinato da Giorgio Chiosso e Roberto Sani<sup>92</sup>.

Da parte di questi studiosi la letteratura per l'infanzia è stata ed è riguardata e utilizzata come una fonte di primaria importanza per lumeggiare da un lato le modalità di costruzione, nell'Italia dell'Otto e del Novecento, dell'immaginario collettivo intorno all'infanzia, alla famiglia, alle pratiche educative, al rapporto adulto-minore; dall'altro per cogliere in forma più articolata e concreta il modo in cui si è affermata, a partire dal secolo XIX, l'egemonia ideologica e culturale borghese nel nostro paese.

Relativamente a quest'ultimo aspetto, la letteratura per l'infanzia e la gioventù è stata indagata quale veicolo di sistemi valoriali, modelli di comportamento, concezione gerarchica dei rapporti interpersonali; e nella sua funzione di strumento di disciplinamento delle coscienze e di costruzione dell'identità sociale e civile e del sentimento nazionale nelle nuove generazioni.

Si potrebbe aggiungere che è merito non secondario di questa storiografia sulla letteratura per l'infanzia l'aver offerto agli storici dell'educazione spunti rilevanti per l'analisi e la comprensione di fenomeni e processi fino a quel momento solo sfiorati, quando non del tutto ignorati da questi ultimi: basterebbe qui far riferimento all'immaginario infantile o a quello degli adulti sull'infanzia, e alla loro evoluzione nel corso del tempo; ma si potrebbe anche accennare al tema della storia della mentalità, ovvero al ruolo esercitato dalla letteratura infantile nella costruzione di schemi mentali, di universi simbolici, di convinzioni morali e costumi civili, destinati a modellare e alimentare l'universo dei comportamenti individuali e collettivi.

Su questo versante, non credo sia eccessivo sottolineare il ruolo esercitato dalla letteratura per l'infanzia nella veicolazione e universalizzazione di tanta parte dei

<sup>92</sup> Chiosso (ed.), *Il libro per la scuola tra Sette e Ottocento*, cit.; Id. (dir.), *TESEO. Tipografi e editori scolastico-educativi dell'Ottocento*, cit.; Id., *Il rinnovamento del libro scolastico nelle esperienze di Giuseppe Lombardo Radice e dei «lombardiani»*, «History of Education & Children's Literature», vol. I, n. 1, 2006, pp. 127-139; Id. (dir.), *TESEO '900. Editori scolastico-educativi del primo Novecento*, cit.; Ascenzi, Sani (edd.), *Il libro per la scuola tra idealismo e fascismo. L'opera della Commissione centrale per l'esame dei libri di testo da Giuseppe Lombardo Radice ad Alessandro Melchiori (1923-1928)*, cit.; F. Targhetta, *La capitale dell'impero di carta. Editori per la scuola a Torino nella prima metà del Novecento*, Torino, SEI, 2007; Id., *Serenant e illuminant. I cento anni della SEI*, Torino, SEI, 2008; Barausse (a cura di), *Il libro per la scuola dall'Unità al fascismo. La normativa sui libri di testo dalla legge Casati alla riforma Gentile (1861-1922)*, cit.; Ascenzi, 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)*, cit.; A. Barausse, *Dal Regno di Sardegna al Regno d'Italia. Continuità e discontinuità nelle politiche del libro scolastico*, «History of Education & Children's Literature», vol. V, n. 1, 2010, pp. 377-415; vol. V, n. 2, 2010, pp. 301-338; A. Ascenzi, «Per impedire l'intrusione nell'istruzione nazionale del seme di mala scienza e di mali costumi». *La relazione di Luigi Gabriele Pessina sull'esame dei libri di testo (1881)*, «History of Education & Children's Literature», vol. V, n. 2, 2010, pp. 339-381; M.C. Morandini, *I manuali per l'educazione dei sordomuti: i testi di lingua e di istruzione religiosa*, in P. Bianchini (ed.), *Le origini delle materie. Discipline, programmi e manuali scolastici in Italia*, Torino, SEI, 2010, pp. 139-165.

modelli e indirizzi elaborati in sede pedagogica, qualunque fosse la radice e la genesi della pedagogia, o delle pedagogie, dominanti in una determinata epoca. Si pensi, solo per fare qualche rapido esempio, alle caratteristiche della veicolazione/ricezione dei valori alla base dell'egemonia politica e culturale borghese nell'Ottocento postunitario o, su un altro versante, alle forme di penetrazione, nella società italiana tra le due guerre, dell'ideologia totalitaria fascista<sup>93</sup>.

Il recente apporto della storiografia educativa e sociale al settore degli studi sulla letteratura per l'infanzia ha avuto, infine, il grande merito di prospettare ai cultori di questa disciplina nuovi filoni di indagine e originali piste di ricerca che, in questa sede, mi limito solo a richiamare brevemente. Penso ad esempio alla necessità, indicata da più studiosi, di andare oltre l'analisi testuale e l'approfondimento del «congegno narrativo» dei testi per l'infanzia e la gioventù, allargando l'indagine anche ad aspetti fino ad ora poco o nulla studiati:

- la circolazione e fruizione dei libri per l'infanzia e la gioventù, da indagare attraverso l'analisi delle tirature, delle riedizioni e ristampe, della presenza nelle biblioteche pubbliche e private e in quelle scolastiche o nel circuito delle biblioteche parrocchiali e dell'associazionismo giovanile d'ispirazione cattolica o laico-socialista;
- le collane specializzate e, più in generale, i progetti culturali ed editoriali sottesi alle più significative raccolte di testi per l'infanzia e la gioventù, da indagare, sulla scorta della documentazione offerta dagli archivi delle case editrici, con riferimento ai generi, agli autori, agli illustratori, alle caratteristiche del prodotto editoriale (edizione economica o di pregio, presenza o meno delle illustrazioni, costi e tirature ecc.);
- i libri di testo e la manualistica scolastica, con particolare riferimento ai libri di lettura, agli abbecedari e ai sussidiari per le scuole elementari e popolari: un ambito già meritoriamente approfondito negli ultimi anni, ma che presenta ancora vaste lacune che debbono essere colmate.

Si tratta di filoni di ricerca in molti casi appena avviati, in altri già parzialmente approfonditi, i quali – ed è questo un aspetto che merita di essere sottolineato in questa sede – hanno trovato ricezione nel *Dizionario Biografico dell'Educazione* diretto da Giorgio Chiosso e Roberto Sani, come testimoniano le schede dedicate appunto alla biografia di personalità impegnate, negli ultimi due secoli, sui molteplici e variegati fronti della produzione e divulgazione della letteratura per l'infanzia e la gioventù. A conferma, come ho accennato sopra, della vera e propria centralità rivestita dalla disciplina nel quadro degli studi sull'evoluzione culturale e sui processi formativi nell'Italia degli ultimi due secoli.

<sup>93</sup> Su questi temi, si veda A. Ascenzi, *Education and the metamorphoses of citizenship in contemporary Italy*, Macerata, eum, 2009, pp. 161-252.

# L'opera dell'Associazione nazionale per la fondazione di Asili rurali per l'infanzia di Ottavio Gigli in un recente contributo

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*The National Association for the founding of Rural Infant Schools of Ottavio Gigli and its activity in a recent contribution*

**ABSTRACT:** Through the critical contribution of some of the most influential scholars of the history of the school and educational institutions in Italy in XIX and XX Centuries, the article examines the recent monograph by Anna Ascenzi and Roberto Sani, «Un'altra scuola... per un altro paese». Ottavio Gigli e l'Associazione nazionale per la fondazione di Asili rurali per l'infanzia tra lotta all'analfabetismo e Nation building 1866-1873 (Macerata, eum, 2014).

**EET/TEE KEYWORDS:** History of Education; Rural School; Nursery School; Illiteracy; Private Funds; Italy; XIX<sup>th</sup> Century.

## Simonetta Polenghi

Il volume di Anna Ascenzi e Roberto Sani<sup>1</sup> si segnala all'attenzione degli studiosi per più ragioni. La ricerca è originale, perché ricostruisce un'esperienza significativa e ingiustamente a lungo dimenticata, quella dell'Associazione nazionale per la fondazione di Asili rurali per l'infanzia, sodalizio promosso da Ottavio Gigli: un'esperienza che, ancorché di breve durata, coinvolse figure di politici ed educatori di primo piano e interessò centinaia di piccoli comuni. Il secondo motivo di pregio del volume è legato al fatto che esso è fondato su di una solida ed ampia ricerca archivistica, grazie alla quale sono messe in luce una larga messe di fonti inedite, o edite ma non note, conservate in diversi archivi e biblioteche di Roma, Firenze, Milano, Pesaro, Livorno e Forlì. In terzo luogo, la prospettiva euristica degli autori è quella della *Nation Building*, che già ha consentito in diverse ricerche di evidenziare come la scuola fosse laboratorio di formazione etica e politica negli anni del Risorgimento e dell'Italia unita. Qui l'angolazione riguarda la questione dell'obbligo scolastico, che si interseca con quella del decentramento amministrativo e del liberalismo politico.

Una riflessione si impone subito al lettore: per quali ragioni, cioè, un'esperienza che ha interessato figure del calibro di Matteucci, Mamiani, Ricasoli, Capponi, Tommaseo, sia caduta in un lungo e sconcertante oblio storiografico. Ascenzi e Sani, nell'ottima introduzione, esplicitano le ragioni ideologiche sottese a questa vera e propria rimozione storiografica: ovvero, la diffusa convinzione non solo della centralità dello Stato nel processo di *Nation Building*, ma anche della sua unicità. Questa prospettiva ha focalizzato le ricerche per decenni, in un'ottica che ha posto in luce il ruolo propulsore e quasi egemone dello Stato nella lotta all'analfabetismo e nel cosiddetto dirozzamento delle plebi.

Questo sguardo esclusivo ed escludente ha portato a distorsioni e rimozioni storiche. Ad esempio si può ricordare che mentre allo Stato italiano si ascrivono i meriti della scolarizzazione delle masse, si è a lungo non solo ignorato, ma addirittura negato il ruolo propulsivo dello Stato asburgico nel Lombardo-Veneto, ritenendosi impossibile che un governo cattolico-conservatore potesse promuovere l'alfabetizzazione di bambini e bambine. Anche lo Stato pontificio è stato considerato reazionario, laddove altri studi, di Roberto Sani e Carmela Covato in particolare, hanno mostrato l'ampio ventaglio di iniziative messe in campo per fronteggiare l'analfabetismo: infatti, un altro esempio di rimozione storiografica, sempre connesso ad una visione che vede lo Stato liberale quale unico dispensatore di cultura e di alfabeto, è quello relativo alla

<sup>1</sup> A. Ascenzi, R. Sani, «Un'altra scuola... per un altro paese». *Ottavio Gigli e l'Associazione nazionale per la fondazione di Asili rurali per l'infanzia tra lotta all'analfabetismo e Nation building (1866-1873)*, Macerata, eum, 2014.

negazione dell'azione dinamica e di modernizzazione esercitata dalla Chiesa in ambito educativo. Ormai da decenni è stato invece dimostrato, con una serie di studi, come in particolare le congregazioni religiose, segnatamente quelle femminili, contribuirono in modo marcato al progresso civile del paese e anche all'emancipazione femminile. Anche la storia dell'educazione speciale, una storia consegnata in modo massiccio a privati e a congregazioni religiose, è stata a lungo obliata. A questa concezione dello Stato italiano quale erogatore quasi unico di sapere, che si trova tanto nella storiografia marxista quanto in quella liberale, è ancora sotteso il pregiudizio idealista gentiliano di Stato etico.

Non sorprende allora che l'esperienza della Associazione per gli asili rurali sia stata dimenticata. Come scrivono gli autori nella loro introduzione: «l'opzione statalista che aveva informato l'orientamento casatiano e gli indirizzi di fondo della successiva politica scolastica dello Stato unitario ha finito per assurgere a paradigma di lettura delle stesse vicende scolastiche unitarie orientando in modo significativo, e sul lungo periodo, gli indirizzi e la tipologia degli studi e delle ricerche del settore» (p. 15). Si tratta insomma di una storiografia che ha fatto proprio il punto di vista dei vincitori.

Maria Cristina Morandini ha dimostrato, analisi statistiche alla mano, come esistessero nel Piemonte preunitario altri canali di alfabetizzazione, dato che l'incidenza della scuola non era esclusiva e molti acquisivano l'alfabeto in età adulta. Scuole festive e serali, trasmissione del sapere in modo informale, nei luoghi di lavoro e negli oratori erano altri canali, sostenuti anche da letture popolari e divulgative<sup>2</sup>. Nel Piemonte subalpino si opponevano due correnti, una statalista, l'altra liberalista: la prima favorevole all'obbligo, la seconda invece contraria. È schematico e riduttivo assegnare la patente di illuminato educatore solo a chi credeva nell'obbligo scolastico: indubbiamente vi erano, in Italia come in altri paesi, cattolici come Monaldo Leopardi, che preferivano il contadino ignorante che si fidava del parroco a quello alfabetizzato che poteva accedere a letture pericolose. Ma non va dimenticato che intorno all'obbligo scolastico vi fu un ampio dibattito e che vi erano intellettuali liberali che, pur credendo nella necessità di divulgare il sapere presso il popolo, rifiutavano allo Stato il ruolo di unico educatore. Del resto l'Inghilterra, modello politico di riferimento, conservava una visione liberista anche nell'istruzione e approvò l'obbligo (non la gratuità) scolastico solo nel 1870.

All'Inghilterra guardavano non a caso Ottavio Gigli e i cavouriani Luigi Carlo Farini e Marco Minghetti, autori del progetto di decentramento del 1860-61, e Mamiani, ministro della Pubblica Istruzione nel 1860, che pure voleva limitare il potere statale. Nel 1860 Mamiani disse che lo Stato unico erogatore d'istruzione era «repulsivo e intollerante»<sup>3</sup>. Egli era a favore dei Comuni e

<sup>2</sup> M.C. Morandini, *Scuola e nazione. Maestri e istruzione popolare nella costruzione dello Stato unitario, 1848-1861*, Milano, Vita e Pensiero, 2003.

<sup>3</sup> M. Di Domizio, *L'Università. Storia e problemi*, Milano, Edizioni Viola, 1952, p. 1111.

delle associazioni private: «I cittadini entrino con lo Stato in utile gara, onde scemino la necessità e l'importanza dell'opera sua»<sup>4</sup>. Era questa la concezione di Cavour, cui Mamiani era vicino: in favore del modello inglese e soprattutto belga, ovvero della libera concorrenza in materia scolastica. I cavouriani, come Carlo Boncompagni, erano in polemica con Bertrando Spaventa, idealista, sostenitore dello Stato assoluto e della sola scuola di Stato. Cavour era favorevole alla concorrenza e alla gara tra scuole private e statali, ma data la situazione di strapotere della Chiesa, osservava che la gara non sarebbe stata alla pari, e che occorreva pertanto proteggere le scuole di Stato, sino a che non fossero state in grado di sostenere la concorrenza con quelle cattoliche, radicate da secoli. Negli anni a cavallo dell'unità, anche i liberisti facevano un passo indietro e tendevano a proteggere la scuola statale, per consentire la sua affermazione.

Il tema dell'obbligo si lega poi a quello del decentramento amministrativo, una questione che non a caso interessò i protagonisti dell'Associazione nazionale per la fondazione di Asili rurali per l'infanzia. Carlo Matteucci, accentratore come ministro, era stato inizialmente un fautore moderato del decentramento, come Bettino Ricasoli. Il cattolico Nicolò Tommaseo sosteneva l'educazione privata. Mamiani, cavouriano e promotore del decentramento, era l'autore del Regolamento del 15 settembre 1860, più volte citato nel volume, al quale si rifacevano Gigli e i sodali dell'Associazione. Il Regolamento, infatti, affermava che le scuole private, se conformi alle leggi, avrebbero potuto sgravare i Comuni dai loro oneri.

All'interno del mondo liberale esistevano due correnti: quella favorevole all'accentramento amministrativo e al ruolo forte dello Stato, necessario per far fronte all'arretratezza italiana, che richiedeva un forte impulso dal centro. Questa visione era fondata sulla sfiducia nella società civile, in particolare di quella Meridionale, e prevalse nell'età della Sinistra storica e dell'egemonia culturale del Positivismo. L'altra corrente liberale invece, quella dei cavouriani, si ispirava all'Inghilterra, a Smith, a Stuart Mill e a Tocqueville e guardava con maggior ottimismo alla società civile e al ruolo degli enti locali. I progetti di decentramento però, sostenuti da Jacini e da Ponza di San Martino, uscirono sconfitti, come già quelli di Farini e Minghetti.

L'esperienza dell'Associazione nazionale per la fondazione di Asili rurali per l'infanzia di Gigli è inoltre collegata al cattolicesimo liberale, o almeno al liberalismo cristiano: Gigli fu coinvolto nella stagione di Pio IX e collaborò con Pellegrino Rossi, che lo chiamò nell'ottobre 1848 a dirigere il nuovo Ufficio centrale di statistica. Incarcerato nel 1850 con l'accusa di adesione al liberalismo e di amicizia con Aurelio Saffi, Gigli poi riparò a Firenze. La sua personale vicenda si inserisce nella più ampia vicenda della sconfitta politica del cattolicesimo liberale italiano, che pure contribuisce a spiegare l'oblio storiografico che ha gravato sull'Associazione.

<sup>4</sup> Atti Parlamentari, VIII Leg., *Camera, Docc.*, 12 giugno 1860, p. 422.

Degno di nota è l'impegno di Ottavio Gigli in favore dell'istruzione professionale nella Roma pontificia, già in precedenza indagato da Roberto Sani. Gigli legava inoltre istruzione ed educazione morale e religiosa, ovvero alfabetizzazione e buone letture. Anche dopo l'unità egli mantenne un atteggiamento aperto: ad esempio, nel 1862 fondò a Firenze il settimanale «Letture serali pel popolo. Giornale di educazione e istruzione morale e civile», nel quale lodava per l'impegno profuso in favore dell'istruzione popolare, accanto alla Toscana e al Piemonte, anche l'Austria del Lombardo-Veneto (p. 45), dimostrando una obiettività di giudizio che invece, per ragioni nazionalistiche, mancava a molti altri, tra i quali Cesare Correnti.

Fu proprio Correnti, con Bargoni e Coppino, a far valere dal 1869 un'interpretazione restrittiva e giuridicamente inesatta del regolamento Mamiani, assegnando allo Stato il ruolo di unico educatore rifiutando la riforma dell'ordinamento casatiano voluta dall'Associazione.

L'Associazione di Gigli, che osteggiava l'imposizione dell'obbligo, in quanto principio illiberale, e al contempo promuoveva l'istituzione di asili rurali, aveva contro tanto i liberali statalisti quanto i cattolici conservatori. Si veda il duro giudizio della *Civiltà cattolica* sul coinvolgimento dei parroci, sollecitato dall'Associazione: come potevano, infatti, dei massoni, pretendere di coinvolgere il clero in una loro opera educativa (pp. 78-79)? L'accusa di adesione alla Massoneria era spesso mossa ai cattolici liberali. Il cavouriano Mamiani apparteneva alla corrente spiritualista della Massoneria. In effetti, non moltissimi sacerdoti aderirono all'appello lanciato da Gigli nel 1866 per promuovere gli Asili rurali (389 su 4361 soci, p. 79).

L'Associazione era contraria all'obbligo imposto dall'alto, ma voleva il coinvolgimento dal basso di contadini e massari, i cui figli frequentavano l'asilo-scuola, ispirato a valori cristiani: ciò significava guardare con ottimismo ai contadini e alla loro capacità civile di autodeterminazione. Al contrario, intellettuali e politici positivisti e della Sinistra storica, come detto, coltivavano il pregiudizio della presunta immoralità delle plebi rurali, da dirozzare nelle caserme e nelle scuole, veicolando valori laici. I contadini erano ritenuti troppo asserviti ai parroci.

In realtà va osservato, come fatto già in altro suo lavoro da Roberto Sani<sup>5</sup>, che se il lavoro minorile fu certamente ostacolo all'obbligo scolastico, lo fu anche il sospetto delle famiglie verso una scuola priva di contenuti religiosi. Il successo, ancora per tutto l'Ottocento, delle scuole religiose, soprattutto ma non solo quelle per le ragazze, preferite dalle famiglie, si fonda sul medesimo motivo.

Nicolò Tommaseo, in una lettera a Gigli del 14 luglio 1872, sottolineava che per diffondere la scuola occorreva l'accordo con le famiglie. Si diceva

<sup>5</sup> R. Sani, *State, Church and School in Italy from 1861 to 1870*, «History of Education & Children's Literature», vol. VI, n. 2, 2011, pp. 107-112.

poco persuaso dell'affermazione di Mamiani, secondo il quale l'ignoranza del popolo era l'ultimo baluardo degli avversari della nazione, cioè della Chiesa. Tommaseo ribatteva che «coloro che dicono di essere la nazione» ignoravano affetti e consuetudini del popolo (pp. 300-301). All'interno dell'Associazione stessa, esisteva quindi in realtà una differenza di vedute, tra liberali cristiani ma anticlericali e cattolici liberali.

Il motivo di fondo, che spiega l'irrigidimento del Ministero della Pubblica Istruzione nei confronti dell'Associazione di Gigli, è nella volontà di imporre un modello valoriale, quello della borghesia laica al potere, sulle masse contadine cattoliche. I lavori di Cesare Mozzarelli hanno invece documentato l'imprescindibile nesso tra cattolicesimo e italianità<sup>6</sup>. L'inchiesta Broglio sullo Stato dell'istruzione elementare ammetteva: «Duole doverlo dire: in assai scuole l'ammaestramento si mantiene, com'era in antico, alle mani dei preti di campagna» (p. 111). Poiché non avevano frequentato una scuola normale, i parroci venivano accusati dal ministero di esser privi di metodo didattico. All'epoca, però, erano molti i maestri privi di patente. Buonazia, nella relazione al Ministero stesa nel 1873 ammetteva che la maggioranza dei bambini di campagna non frequentava. Infatti nel 1869 la maggior parte dei prefetti presidenti dei Consigli scolastici provinciali aveva proposto l'istituzione di Asili rurali ovunque possibile, per contrastare la diserzione delle scuole pubbliche. Del resto il programma degli Asili rurali si rifaceva ad Aporti e incoraggiava l'uso della lingua italiana e grazie al coinvolgimento delle famiglie poteva contrastare l'evasione.

Ma fu proprio la proposta di trasformare gli asili in asili-scuola a determinare, negli anni Settanta, la fine dell'Associazione. Prima ancora della legge Coppino, il ministero della Pubblica Istruzione spingeva, sin dal 1869, verso quella direzione, nella misura in cui assegnava le scuole elementari solo ai Comuni e non ai privati, in contrasto con il Regolamento Mamiani. È significativo che entrassero nell'Associazione di Gigli proprio gli uomini che dalla Minerva la combattevano: è presumibile che in tal modo contribuissero a bloccarla anche dall'interno. Coppino nel 1873 fu eletto nella direzione, Amari e Bargoni nel Comitato centrale. L'Associazione venne depotenziata, limitandone l'azione ai comuni sotto i 500 abitanti.

Come detto, il prevalere del Positivismo pedagogico e della massoneria giocò un ruolo determinante: Gigli nella lettera a Tommaseo del 27 ottobre 1869 accusava velatamente Villari e i froebeliani (era iniziata la campagna di Pick), nonché i pedagogisti che dopo aver sostenuto per 30 anni gli asili aportiani ora pendevano in favore di Froebel. L'asilo di Aporti era già scuola, mentre quello di Froebel era pre-scuola: per le campagne, quindi, rimarcava Gigli, occorreva il metodo aportiano (anche se c'era polemica tra gli Aportiani puri

<sup>6</sup> Si veda almeno C. Mozzarelli (ed.), *Identità italiana e cattolicesimo: una prospettiva storica*, Roma, Carocci, 2003.



e l'Associazione nazionale per la fondazione di Asili rurali, p. 345), che era il metodo più economico per istruire i bambini di campagna. Come si vede, in Gigli prevalevano ragioni economiche e un sano pragmatismo su astrattezze pedagogiche. Citando Pestalozzi, Gigli scriveva: «esperimentate e prendete il buono dove è», in modo «non esclusivo» (p. 291).

L'Associazione di Gigli finì schiacciata: rappresentava una terza via, liberal-cristiana, tra cattolici intransigenti da un lato e liberali statalisti, positivisti, massoni dall'altro. Che anticlericali come Correnti e Coppino si opponessero agli asili-scuola, non desta stupore, ma ci si aspetterebbe un'altra posizione dal ministro Scialoja, liberista e liberale (basti ricordare il suo progetto di legge 1872-73 sull'Università, che comprimeva il potere dello Stato in favore dell'intervento degli enti locali). Ma un conto era dare libertà all'istruzione superiore, un altro a quella popolare. Vi era cioè negli intellettuali e nei politici liberali (come già era accaduto nell'età dei Lumi) una sensibile contrazione del concetto di libertà, quando questo veniva riferito alle masse popolari e contadine, alle quali si volevano veicolare valori laici e patriottici.

Carmen Betti

L'organico e riccamente documentato volume di cui mi accingo a scrivere, di Anna Ascenzi e Roberto Sani, tratta di Ottavio Gigli, uno studioso, pubblicitista e animatore di cultura dal poliedrico profilo intellettuale e dall'intenso impegno educativo, che ha operato intorno alla metà dell'800 e che, se non del tutto sconosciuto, è rimasto però in ombra, fino a scivolare a poco a poco nell'oblio. Dunque, si tratta di un volume quanto mai prezioso. E non solo o non soltanto per la sua evidente originalità o per la ricca messe di fonti utilizzate, molte delle quali, inedite, compaiono nella corposa appendice del volume, ma soprattutto perché suscita, a ragione, giustificati interrogativi sui perché dell'oblio che ha rivestito tale figura e il suo prolungato e ben visibile impegno, situato prima e dopo l'Unità, dunque in un periodo di svolta, non certo poco studiato. E non a caso i due autori sollevano, data l'eccezionalità del silenzio che non stentano a definire «rimozione», non generici interrogativi, fino a caldeggiare una revisione storiografica. Ma è opportuno andar per gradi e riesaminare questo testo nei suoi quattro, documentatissimi capitoli, chiedendoci innanzitutto chi era Ottavio Gigli e dove e in quale direzione ha mosso i suoi passi.

Gigli era nato a Roma, nell'aprile del 1816, discendente di «un'antica famiglia appartenente alla nobiltà di Anagni» (p. 27). Terminati, ancor giovanissimo, gli studi letterari, sotto l'autorevole guida di Pietro Del Rio, si era presto inserito negli ambienti intellettuali più in vista della capitale, anche perché divenuto

segretario di un monsignore, Carlo Emanuele Muzzarelli, uno dei due principali animatori del «circolo classicista capitolino». A soli ventidue anni, nel 1838, egli dava alle stampe «il suo primo e importante lavoro di carattere filologico e letterario: una raccolta di lettere inedite del celebre scrittore gesuita Daniello Bartoli e di suoi corrispondenti della Compagnia di Gesù», che riscosse molti apprezzamenti e lo stimolò ad osare di più, a dar vita cioè a quella che, secondo gli autori del volume, «può essere considerata la sua impresa letteraria di maggiore respiro: la creazione della «Biblioteca classica sacra o sia Raccolta di opere religiose edite ed inedite dal secolo XIV al XIX», inaugurata nel 1840, dunque quand'egli era appena ventiquattrenne, cui attese per molto tempo e con molta dedizione e altrettanto rigore (p. 28). Parallelamente, egli collaborò ad alcuni periodici artistici e letterari «tra i più vivaci» degli ambienti capitolini, fino ad assumere più tardi, nel clima di maggiore liberalità che fece seguito all'elezione di Giovanni Maria Mastai Ferretti al soglio pontificio, la direzione del quotidiano politico-culturale «L'Unione», sostenendovi le riforme cui dava nel frattempo corso il nuovo papa, compresa la causa dell'indipendenza italiana, da questi inizialmente caldeggiata.

Dal profilo delineato nel volume, emerge un giovane intraprendente, versatile, anzi vulcanico, che giunse ad occuparsi persino di strade ferrate, costituendo un'omonima società e un periodico, «La Locomotiva», da lui fondato e diretto dal gennaio all'agosto del 1847, nell'intento di sviluppare una rete ferroviaria nei territori pontifici. L'idea forza del progetto, che trasferirà come vedremo nello stesso ambito scolastico-educativo, era quella di una cointeressenza fra pubblico e privato, basata sul micro azionariato diffuso, di tipo anglosassone. Il settore tuttavia, cui riserverà le sue maggiori energie già da questi primi anni, fu senz'altro quello dell'istruzione popolare e dell'educazione dell'infanzia.

Va premesso che fin dal periodo della Restaurazione, come evidenziano gli autori, le autorità pontificie avevano cercato di promuovere la formazione artigiana innanzitutto fra le giovanette e i ragazzi pericolanti, ospiti degli istituti di mendicizia presenti nella capitale oltre che in scuole create appositamente per l'alfabetizzazione e la formazione professionale dei figli del popolo già inseriti o da inserire nel mondo del lavoro. Tali istituzioni, grazie anche al contributo di facoltosi privati che vedevano in esse un efficace antidoto contro la criminalità giovanile, erano venute crescendo di numero, come pure era parallelamente cresciuto quello degli ospiti e dei frequentanti. Ma la benemerita opera di tali istituti era in larga misura compromessa dalla totale mancanza di libri per uso didattico e di lettura.

Ad adoprarsi prontamente per porvi rimedio fu, una volta ancora, il giovane Ottavio Gigli, che – come ben evidenziano Ascenzi e Sani – era da tempo in rapporto con Ferrante Aporti e Raffaele Lambruschini, di cui apprezzava idee e iniziative, che voleva trasferire nella città papalina. Fu così che nel corso del 1847, egli promosse, con l'autorevole sostegno di alcuni prelati più aperti e di esponenti della nobiltà laziale illuminata, una serie di interessanti progetti,

come la pubblicazione di un settimanale, il cui programma era ben esplicitato già nel titolo, «L'Artigianello», dove furono ospitati racconti che trattavano del mondo del lavoro e dei connessi problemi, oltre a «rubriche e articoli relativi alla storia sacra e a quella civile, alla tecnologia artigiana, all'igiene, alla storia naturale, all'aritmetica e geometria, al costume e alle biografie di 'santi artigiani' e di benefattori dell'umanità» (p. 34).

Sempre in risposta alle tangibili difficoltà didattiche di quanti insegnavano nelle istituzioni anzidette, Gigli provvide a creare anche una collana di libri e di opere educative per l'istruzione primaria, denominata «Biblioteca delle Famiglie», dove, oltre alla pubblicazione degli *Elementi di pedagogia ossia Della ragionevole educazione de' fanciulli*, e del *Metodo per adoperare fruttuosamente l'abecedario e sillabario*, di Ferrante Aporti, vi collocò anche un suo manualetto per l'apprendimento della lettura, di cui c'era grande necessità: *Sillabario e alfabeto figurato*, oltre ad altri testi di noti studiosi come, di Vitale Rosi: *Elementi di aritmetica pratica e teorica secondo il metodo di Pestalozzi*, dimostrando di essere non solo sensibile ai problemi di quanti insegnavano ma anche aggiornato sulle proposte didattiche più moderne.

Nello stesso anno, avviò poi altre due importanti iniziative: la *Società per la propagazione de' libri utili e morali da donarsi al povero*, tesa a diffondere libri capaci di favorire il dirozzamento delle masse popolari attraverso racconti ed esempi di vita edificanti e, infine, la *Società degli Asili infantili di Roma* «che – scrivono gli autori – si fece promotrice della fondazione del primo asilo infantile apertiano della capitale nel popoloso quartiere di Trastevere», il quale, negli intenti di Gigli, doveva fungere da prototipo per una serie di analoghe istituzioni, in città come in campagna, grazie al sostegno delle autorità ecclesiastiche e alla generosità privata (p. 37).

Nel volume si evidenzia che l'attenzione di Gigli non era concentrata o ristretta alla sola cerchia urbana, ma che anzi, come scriveva su «L'Artigianello», gli appariva ancor più fondamentale ed urgente l'intervento nelle campagne, dando prova di una sensibilità sociologica e pedagogica non certo comune. Le campagne infatti erano all'epoca molto popolate, ma, nella carenza generale, le più sfornite di luoghi di custodia e di educazione dell'infanzia. E proprio questo proposito di diffusione di infrastrutture per l'infanzia rurale, in cui voleva il coinvolgimento diretto e il contributo, caso mai in solido attraverso derrate alimentari, degli stessi genitori dei bambini ospitati, prefigura *in nuce* quella che sarà l'idea forza del progetto, di ben più vasta portata, di cui si farà sostenitore e animatore una quindicina di anni più tardi. Ciò accadde a Firenze, dove infatti egli si era trasferito fin dall'inizio degli anni Cinquanta – dopo una breve esperienza come deputato a Roma e poi come direttore dell'Ufficio centrale di Statistica, incarico protrattosi anche ai tempi della Repubblica romana – allo scopo di sottrarsi del tutto ai sospetti di collaborazionismo nutriti dalle ripristinate autorità ecclesiastiche. E a Firenze, per una decina di anni circa, egli condusse una vita privatissima, occupandosi dell'esclusivo arricchimento della

«Biblioteca classica sacra o sia Raccolta di opere religiose edite ed inedite dal secolo XIV al XIX», cui non aveva atteso sempre con la stessa assiduità, ma mai abbandonato.

Gli autori sottolineano che dopo la dipartita del Granduca, il periodo storico era per Gigli troppo ricco di suggestioni, per continuare a vivere ai margini della vita pubblica. Peraltro, troppo indispensabile gli appariva, per il successo dello stesso disegno unitario, il rilancio del passato impegno sul piano dell'educazione delle masse popolari, come scriveva a Garibaldi, nel febbraio del 1862: «Perché noi possiamo assicurare a' nostri figli un avvenire ugualmente felice, e sicuro da ogni invidia, e prepotenza straniera, bisogna moralizzare, ed istruire il nostro popolo: e se vi è necessità di un milione di fucili, non vi è minor bisogno di un milione di Scuole» (p. 43). Di lì a due mesi, egli fondava un nuovo periodico, il settimanale «Letture serali pel popolo. Giornale di educazione e di istruzione morale e civile», che, sottolineano gli autori, divenne «nell'arco di pochi anni uno dei più diffusi periodici educativo-popolari della penisola», grazie anche al lancio, in ben ventimila copie, del suo programma (p. 43).

E proprio attraverso il periodico, egli portò avanti una sostenuta battaglia contro il grave stato di abbandono culturale in cui versavano le plebi rurali, per lui, al contrario, fonti primarie della ricchezza del Paese, perché «que' buoni contadini [...] hanno in mano il tesoro della nostra vita che sono i campi'» (p. 54). Emerge qui – per inciso – la mentalità ancora graniticamente ruralistica di Gigli che pare non avesse colto le potenzialità insite nel sistema manifatturiero-industriale e in quello della finanza, a differenza di molti altri nobili toscani, già inseriti nei circuiti creditizi. Un'opera di dirozzamento, quella sopra accennata, che gli appariva immane e urgentissima e che richiedeva, a suo dire, non solo l'attivazione delle pubbliche istituzioni ma anche quella, concorde, di tutti i cittadini consapevoli, in un progetto di intervento misto, pubblico-privato, basato, come accennato, sul piccolo azionariato di tipo anglosassone, il solo in grado, per lui, di mobilitare le migliori risorse ed energie del neonato Paese. Scriveva: «Questa è l'opera più giusta che un cittadino può rendere alla patria [...] poiché il suo avvenire è tutto nell'educazione e nell'istruzione del popolo. L'unità, la libertà, l'indipendenza se non ha questa base non può essere durevole, e questo Regno d'Italia tanto trionferà d'ogni nemico interno ed esterno quanto troverà cuori e intelletti che sappiano conoscere i propri diritti e i propri doveri» (p. 51).

Ascenzi e Sani mettono in luce che anche in merito alle soluzioni da adottare egli era venuto chiarendosi ulteriormente le idee. Se un tempo il suo modello era l'asilo apertiano, adesso aveva in mente qualcosa di diverso: un asilo sì, aperto ai bambini in tenera età che sollevasse per ciò stesso i genitori dal continuo accudimento dei figli e consentisse loro di attendere agli impegni quotidiani, ma tale da evolvere in una sorta di scuola, più «leggera» di quella regolare, volta comunque ad impartire i primi rudimenti del sapere. Dunque un asilo-scuola, di cui egli volle creare un prototipo in località Castello e Quarto nel comune

di Sesto Fiorentino, alle porte di Firenze, che fu inaugurato fin dalla primavera del 1863. Di questi suoi propositi e della organizzazione che avrebbe voluto conferire alle prefigurate infrastrutture, nonché dell'intenzione di coinvolgere nel loro mantenimento l'utenza stessa, in forme diverse a seconda delle possibilità di ciascuno, Gigli dava ampi ragguagli sul periodico da lui diretto, ora indirizzando entusiastici apprezzamenti all'operato, in proposito, di Carlo Matteucci, nella sua veste di Ministro della P.I., ora scrivendo lettere aperte a Raffaele Lambruschini, che nel frattempo aveva assunto la carica di «ispettore generale delle Scuole». Lettere o articoli che denotano, come del resto gli altri suoi scritti, competenze organizzative e pedagogiche davvero straordinarie, come ben evidenziano gli autori.

Ma né il suo progetto né le sue lettere registrarono – lo si dice – particolare *audience*, neppure dopo gli esiti, inquietanti, dell'Inchiesta Matteucci, da cui emergeva, come costante in tutto il Paese, che le scuole rurali non assolvevano nei fatti alcuna effettiva opera di alfabetizzazione, perché venivano disertate per lunghissimi periodi, anche dai pochi iscritti. Quell'Inchiesta, per Gigli, metteva invece a nudo la totale inadeguatezza dell'ordinamento casatiano per le realtà rurali – tanto del Nord che del Sud, delle zone insulari o centrali – perché prevedeva, a suo dire, un modello scolastico rigido e omogeneo, per aree, al contrario, altamente disomogenee. E poi, specificava: «Le plebi in Italia non sono tali da intendere questo beneficio che loro si crede procacciare, i Comuni che potrebbero farlo sono anch'essi ancora ignoranti o indolenti», da qui la necessità di cambiare strada.

Facendosi forte dell'art. 14 del Regolamento Mamiani del 15 settembre del 1860, secondo cui «scuole fondate da particolari corporazioni, da associazioni private o da privati individui a beneficio del pubblico» purché in conformità delle leggi, potevano essere «tenute in conto ed a sgravio totale o parziale degli obblighi del Comune», egli prefigurava la possibilità di costituire un' «Associazione Nazionale per l'istruzione del popolo» che, a fronte del centralismo e dell'egemonia statale, propri dell'ordinamento casatiano e del connesso principio dell'obbligo scolastico, puntasse al contrario sul contributo delle pubbliche istituzioni ma soprattutto di quello dei comuni cittadini, in vista di soluzioni più congrue rispetto ai bisogni degli abitanti delle zone rurali, con ingresso dei minori negli asili fra i 3-4 anni – così da sollevare i genitori, come accennato, dalla loro custodia – fino agli otto-nove, in modo da emanciparli dall'impegno scolastico, proprio nel momento in cui potevano essere utilmente impiegati nei lavori agricoli (p. 71).

Per quanto dotato di indiscussa *ratio* e di coerente organicità, il manifesto scolastico-educativo di Gigli – lo sottolineano con chiarezza gli autori – lasciò tutto sommato freddi gli stessi ambienti toscani in cui contava molti amici e conoscenze influenti, tant'è che di esso non si discusse neppure nel corso dei lavori del coevo Congresso pedagogico, svoltosi a Firenze dal 6 al 10 settembre 1864. È fondato pensare che per Gigli la delusione non fosse stata poco

cocente e che fosse altresì all'origine della sua improvvisa decisione di trasferire a Milano, nella successiva primavera, la redazione del suo settimanale e di intestarne addirittura la direzione a Pacifico Valussi, membro della sacchiana Associazione Pedagogica Italiana, ma promotore, insieme ad altri, di un nuovo sodalizio, l'«Associazione nazionale per l'istruzione popolare in Italia», di cui Gigli aveva già dato notizie, pubblicando sul suo settimanale diversi articoli firmati proprio da Valussi. Non gli occorre però molto tempo per scoprire le loro diversità di intenti: Gigli ambiva infatti a fondare asili-scuola, Valussi invece voleva semplicemente sostenere l'apertura di scuole, decisa però da terzi; e poi presto emerse che non c'erano rose e fiori neppure in terra lombarda, tant'è che quando la neo Associazione ambrosiana tentò di oltrepassare le mura cittadine, trovò scarsissimo seguito. Con la stessa velocità con cui se ne era entusiasmato, egli ne prese allora le distanze, per volgersi a tessere di lì a poco una nuova rete associativa a Firenze, ormai capitale conclamata del Paese, decisione forse propiziata anche dai suoi stessi amici e conoscenti di ieri, più disposti oggi ad ascoltarlo.

E così, ai primi del 1866, non si sentì più invocare soltanto, genericamente, l'utilità di un sodalizio nazionale per l'educazione popolare, perché venne ufficialmente annunciata la costituzione di un'«Associazione Nazionale degli Asili Rurali per l'infanzia», il cui Comitato promotore era addirittura formato da Gino Capponi, Terenzio Mamiani, Carlo Matteucci, Bettino Ricasoli, e ovviamente Ottavio Gigli che ne era l'ispiratore. Nel volgere di un paio di mesi furono contate ben 250 adesioni, da tutte le parti d'Italia, che andarono a costituire il Comitato dei sostenitori, «tra i quali figuravano ben 25 tra deputati e senatori, numerosi esponenti dell'aristocrazia terriera e della borghesia urbana dei commerci e delle professioni, nonché un'ampia schiera di letterati, studiosi, educatori e uomini di scuola» (p. 70). Fra i molti nomi annotati da Ascenzi e Sani, ne ricordiamo alcuni, particolarmente illustri o evocativi di un serio impegno culturale ed educativo, come quello di Francesco De Sanctis, di Angelo De Gubernatis, Pietro Fanfani, Cesare Guasti, Mauro Macchi, Achille Mauri, Enrico Mayer, Annamaria Mozzoni, Luisa Amalia Paladini. Nomi che, grazie alle acquisizioni storiografiche intervenute, consentono di avvalorare quanto sosteneva, a caldo, «La Civiltà cattolica», ovvero che molti di loro appartenevano a noti «fratelli» e dunque non è da escludere che l'intero progetto nascesse in qualche misura, ma non sono gli autori ad evidenziarlo, con l'*endorsement* della fratellanza massonica, di quella più moderata, propensa a non disdegnare patteggiamenti con gli stessi ambienti ecclesiastici, qualora se ne fosse ravvisata l'utilità o il tornaconto.

Il Comitato provvide, nell'aprile del 1866, ad approvare lo Statuto del nuovo sodalizio, il cui palinsesto prevedeva, oltre ai Comitati locali, che costituivano l'innervatura sul territorio del sodalizio, tre organi decisionali: l'Assemblea generale, il Comitato centrale, formato da 75 membri rappresentativi di tutte le province, il Consiglio direttivo, di cinque membri, più un cassiere e

il segretario. Lo Statuto della costituenda «Associazione nazionale degli Asili Rurali per l'Infanzia» stabiliva che essa aveva «per *iscopo* la fondazione di asili rurali per l'infanzia in tutta Italia» che ne sarebbero diventati soci «tutti quelli che si uniscono a tale scopo [...] sottoscrivendo per un'azione almeno di lire due l'anno per un quinquennio» (p. 70) e che oltre alla statuita contribuzione obbligatoria, erano auspicati contributi, lasciti, sussidi di privati cittadini ma anche il sostegno di tutti gli organismi e gli enti pubblici, centrali e periferici. Infine, che la costituenda associazione sarebbe diventata operante solo in presenza della sottoscrizione di «almeno mille azioni» (p. 73).

Ma come non avrebbe potuto raggiungere tale traguardo, se si tiene conto dell'autorevolezza dei sottoscrittori ed anche dell'autoritatività di certi loro atti, a sostegno del nascente sodalizio? Intendiamo alludere *in primis* alla circolare diramata il 1° ottobre 1866 da Bettino Ricasoli a tutti i Prefetti e Sotto-prefetti del Regno, nella sua veste di Ministro dell'Interno – di cui nel volume si riportano ampi stralci – per illustrare gli obiettivi dell'Associazione e promuoverne la costituzione nei territori di pertinenza: «La Statistica – vi si sosteneva – ha fatto sventuratamente conoscere come circa 17 milioni di analfabeti si contino ancora in Italia, e più che 13 di essi nelle campagne». Preciso poi come tutte le benefiche iniziative avessero stretta pertinenza con le attribuzioni del ministero da lui presieduto, Ricasoli dichiarava di ritenere «suo debito raccomandare, per vedute di comune utilità, alla S.V. l'Associazione Nazionale per la fondazione di Asili rurali per l'Infanzia, che alcuni benemeriti cittadini, all'opera dei quali il sottoscritto onorasi di unire la sua, vorrebbero costituire, e di cui Le si spedisce il Programma e la Proposta di Statuto fondamentale» (p. 74).

Ovviamente questo non fu che il primo atto. A distanza di all'incirca un mese, quindi ai primi di novembre, partiva infatti, a firma dei membri del Comitato promotore, una seconda comunicazione, una specie di lettera-questionario diretta a tutti i parroci d'Italia, in ben 18 mila copie, ritenendosi essere quello un passaggio obbligato per il successo dell'iniziativa nelle campagne (p. 80). Premesso, nella lettera, che la nascente associazione si ispirava all'unico «comune principio di moralità e di amore al bene, nel quale debbono convenire tutti gli uomini onesti», e che si poneva al di sopra di tutte le contrapposizioni ideologiche, in una dimensione pertanto «*naturaliter christiana*», al parroco venivano poi rivolte diverse domande, anche minuziose, per raccogliere informazioni sulle possibilità di allocare nel territorio parrocchiale un asilo-scuola, la disponibilità di eventuali maestre o giovani interessate a formarsi per dirigerlo, di «persone benefiche», favorevoli a promuovere l'iniziativa e, fra le altre, se egli, oltre ad illustrare in chiesa le finalità dell'associazione, si fosse prestato a chiedere «una elemosina», per «cavarne un utilissimo sussidio» (p. 78).

Nel volume si evidenzia che, com'era prevedibile, la lettera non ebbe molti riscontri, innanzitutto per il clima che informava i rapporti fra il mondo liberale e quello ecclesiastico e poi perché «La Civiltà cattolica» non mancò di dire la sua in merito, e lo fece con tono sferzante, definendo quella associazione

«una mala opera» di sapore massonico e quella lettera uno «scherzo amaro» perché mentre si toglieva l'insegnamento religioso dalle scuole, si chiamavano proprio i religiosi affinché «aiutino l'iniquità ad avere in mano i poveri bimbi delle campagne» (p. 78). Stando al resoconto di Gigli, furono mille i parroci che risposero (p. 80), ma di essi, solo 389 – e non erano poi tutto sommato pochissimi – aderirono all'Associazione (p. 79).

Il *battage* promozionale prevede, ovviamente, anche una comunicazione diretta a tutti i sindaci d'Italia, inviata il 30 novembre 1866, il cui tono era, come si rileva da parte degli autori, di tutt'altro genere. In breve, mentre si tornava a sottolineare l'inidoneità della legge Casati per le zone rurali, si prefiguravano molti vantaggi per quei Comuni che avessero deciso di aderire all'Associazione, accettandone il programma, ovvero: sostegno finanziario per aprire asili rurali, per costruire o riadattarne i locali – da utilizzare anche per scuole serali o festive – per la creazione di Istituti-Convitto nei capoluoghi di provincia per la formazione delle maestre. Per aderire, occorreva che il sindaco, interpretando la volontà del consiglio comunale, sottoscrivesse «un certo numero di 'azioni di 2 franchi all'anno' ('una sola ci basta per dar prova di buon volere e di concordia operosa per il bene')», e operasse affinché fosse creato nel Comune un Comitato filiale (p. 81).

Nell'aprile del 1867, dunque a sei mesi dall'inizio della campagna promozionale, come riferiscono Ascenzi e Sani, i soci-azionisti era ben 4.361 e fu pertanto possibile ufficializzare la nascita dell'Associazione e procedere all'elezione dei rappresentanti nei diversi organi dirigenti. Ciò avvenne il 6 giugno del '67: alla presidenza fu eletto l'ex Ministro Carlo Matteucci, mentre per la segreteria fu votato Ottavio Gigli, che era in effetti il più idoneo a ricoprire quell'incarico. Nella Direzione: Gino Capponi, Terenzio Mamiani, Bettino Ricasoli, e altri, insomma un *pool* di personalità altamente prestigiose e influenti (p. 89). Una volta approvate le *Norme e istruzioni per l'istituzione di Asili rurali per l'infanzia*, comprensive degli stessi programmi didattici (p. 91), il Presidente si adoperò ora presso il parlamento, ora presso i ministri per ottenerne il sostegno. A rispondere fu, in particolare, il Ministro dell'Agricoltura, Industria e Commercio, il quale caldeggiò l'Associazione ai costituenti Comizi agrari, organismi capillarmente presenti sul territorio nazionale, diversi dei quali aderirono poi alla Associazione (p. 93). Un altro fattivo sostegno venne dall'Associazione Medica Italiana, la quale raccomandò «agli oltre 4 mila medici associati le iniziative promosse dai Comitati locali dell'Associazione Nazionale degli Asili Rurali per l'Infanzia» (p. 94).

Dalla puntuale ricostruzione effettuata, emerge che la nuova Associazione era partita perlomeno con il vento in poppa, tant'è che nel settembre '67 il numero delle azioni aveva oltrepassato le 15.148 unità, come riferiva con tono compiaciuto il Presidente, che aggiungeva: «si può dire che non c'è angolo della Penisola dove la voce della nostra Associazione non sia giunta e non sia stata accolta con simpatia [...]» (p. 95), mentre di pari passo cresceva il numero



degli asili istituiti *ex novo*. Fu con tutta probabilità questo slancio che convinse i vertici dell'Associazione a premere, come si suol dire, sull'acceleratore e a pensare di richiedere ai Comuni non solo il loro appoggio e il loro sostegno finanziario, ma di procedere addirittura alla trasformazione delle scuole rurali esistenti in Asili-Scuole.

L'invito, indirizzato nel settembre '67 ai Comitati locali dal presidente, che dava seguito a una decisione approvata all'unanimità dalla Direzione su proposta di Gigli fin dal luglio, venne ribadito nel dicembre. Si trattava però ancora di un'azione di sensibilizzazione rivolta ai Comitati, tant'è che «veniva rinviata ad un tempo successivo l'analisi dei 'modi da seguire per operare questa trasformazione» (p. 98). Ma poiché le adesioni crescevano di giorno in giorno, tant'è che nel febbraio 1868 Gigli, nel suo resoconto, riferiva della sottoscrizione di 20 mila azioni, corrispondenti a ben 800 mila lire, fra versate e promesse e che a tale crescita avevano contribuito in larga misura i consigli provinciali e comunali, era nell'ordine delle cose che la questione della trasformazione delle scuole rurali balzasse in primo piano (p. 101). Ciò si verificò a seguito della diffusione, nella primavera del 1868, dei risultati dell'Inchiesta del ministro Broglio sullo *Stato dell'istruzione popolare*, i quali, come già in quella precedente, denunciavano la persistenza di tassi di frequenza molto bassi nelle campagne e la richiesta, da parte di un numero crescente di Consigli scolastici provinciali, di istituire asili infantili ovunque fosse stato possibile (p. 114). Ottavio Gigli non tardò a prendere la palla al balzo, unendovi un'altra delicata proposta, quella della costituzione di Biblioteche circolanti gratuite, su cui non mancavano però riserve da parte di alcuni soci, in relazione alla scelta dei contenuti dei libri.

La discussione dei due argomenti si svolse il 24 maggio del '68 nell'ambito del Comitato centrale, assente il Presidente, Carlo Matteucci, per la malattia che ne avrebbe segnato prematuramente la fine, di lì a un mese esatto. E le contrarietà dei dissidenti, forse anche per quell'assenza, vennero alla luce senza remore con immediati riverberi sulla stampa, che ne amplificò la portata. L'episodio, se pur senza seguito nell'immediato, era comunque la cartina di tornasole del malumore che stava serpeggiando intorno all'operato della nuova Associazione, la quale, non cambiò tuttavia percorso. Sotto la nuova direzione di Terenzio Mamiani, al quale non sfuggiva comunque la necessità di procedere lentamente e con «concordia delle intelligenze», ai sindaci e ai prefetti, che di regola erano i presidenti dei Consigli scolastici provinciali, venne inviata nell'autunno del 1869 una lettera con annesso un dettagliatissimo questionario volto a fare una puntuale radiografia delle diverse realtà territoriali e delle relative risorse scolastiche esistenti, compresi arredi e sussidi esistenti (p. 133).

Di fronte a tanto decisionismo, negli ambienti ministeriali cominciò a crescere, insieme alla preoccupazione, un certo nervosismo, che dovette tradursi anche in un invito rivolto alle autorità periferiche di esercitare un maggiore controllo su quanto stava avvenendo nei territori di competenza, in quanto i Comitati figliali cominciarono ad incontrare molti più ostacoli di prima en loro

operato. Tuttavia, finché il dicastero fu retto da Angelo Bargoni, la situazione non oltrepassò lo stato di allerta, anche se il Ministro della P.I. non mancò di fare presente a Terenzio Mamiani che era stato forzato il senso stesso del tanto invocato art. 14 del Regolamento del 1860, in quanto si chiedeva ai Comuni il loro diretto coinvolgimento nella nascita degli Asili-Scuola o di procedere alla trasformazione delle scuole rurali esistenti e quindi di deliberare *contra legem*. Quando poi al ministero giunse Cesare Correnti, pare anch'egli con legami di «fratellanza», ma anche con un fermissimo senso dello Stato e dei doveri di questo in materia di istruzione, quella popolare inclusa, per l'Associazione cominciò un periodo davvero difficile. In altri termini, proprio alla luce dell'art. 14, contemperato con il testo della legge Casati e dei successivi Regolamenti applicativi, alla Associazione venne posto l'invalidabile limite di poter istituire Asili, anche in sostituzione delle scuole rurali, se esistenti, solo nei Comuni con popolazione inferiore ai 500 abitanti, perché i soli a non essere normati dalla legge Casati. Confini che, oltre a circoscrivere l'operato della Associazione, le crearono intorno un clima di diffidenza e di impopolarità che ne segnarono l'inesorabile declino, per effetto degli stessi progressivi abbandoni dei padri fondatori, i quali non poterono certo valersi del sostegno degli ambienti ecclesiastici che, nel complesso, si mantennero freddi e distanti dall'iniziativa.

A prescindere dagli esiti, alla fine non molto consistenti, di questa comunque importante vicenda, da quanto siamo venuti evidenziando anche con ricchezza di particolari nell'intento di mettere, per quanto possibile, ben in luce la reale portata dell'operato di Gigli, ricostruito con grande rigore e perizia dagli autori del volume, non può non stupire che tutta la sua intensa e vasta attività, l'articolata rete di contatti di cui fu al centro, la consistente pubblicistica e quant'altro ancora, siano potute sfuggire alla storiografia. Secondo gli autori, si tratterebbe di una «vera e propria 'rimozione storiografica'» e aggiungono: «siamo dinanzi al caso di una storiografia che ha fatto proprio il punto di vista dei «vincitori», ovvero che ha assunto come criterio interpretativo della vicenda scolastica ed educativa postunitaria l'ideologia centralistica e statalista sottesa all'ordinamento scolastico casatiano» (pp. 15-16).

Ora non saprei dire se si sia proprio trattato o no di rimozione, o addirittura di scelta più o meno consapevolmente ideologica, per non dare respiro e spessore a opzioni ordinamentali diverse da quella fondata su di un ruolo primario e centrale dello Stato. Riflettendoci, sarei più propensa a credere, con tutte le cautele necessarie, che sia piuttosto mancato un serio approfondimento, sul piano storiografico, delle diverse prospettive ordinamentali che si sono confrontate e anche scontrate nel periodo immediatamente pre o post-unitario, con espressioni, talvolta, anche di conclamato dissenso. Ricordo, tanto per fare una citazione fra le molte possibili, l'atteggiamento di ferma contrarietà espressa a più riprese da Carlo Cattaneo nei confronti dell'ordinamento centralistico, essendo egli favorevole, al contrario, ad un decentramento dei poteri decisionali.

Ma l'unificazione del Paese era stato un processo a carattere aristocratico-borghese, e non già un moto spontaneo delle genti italiane le quali, al contrario, in non pochi casi si erano sentite conquistate, con le immaginabili tensioni centrifughe connesse ad un simile convincimento. E dunque, tutto ciò che poteva indebolire o anche solo far sospettare un affievolimento della coesione, di per sé alquanto precaria, veniva guardato con molta preoccupazione. È tuttavia indubbio che il documentato volume di Ascenzi e Sani fa emergere, al di là e al di sopra di diverse posizioni o linee interpretative, una grave lacuna storiografica per non parlare di *vulnus*, che richiede senz'altro una revisione o ri-lettura che dir si voglia delle vicende di quel periodo ma anche di altri, senza pre-giudizi e senza volontà minimalistiche. Insomma una rilettura capace, per quanto possibile, di restituire agli avvenimenti la loro effettiva dimensione e non già quella presunta o, ancor peggio, quella voluta tale.

Giorgio Chiosso

L'approfondita ricerca di Anna Ascenzi e Roberto Sani condotta sulle fonti archivistiche dell'Associazione Nazionale degli Asili Rurali per l'infanzia – fondata Firenze nel 1866 da Ottavio Gigli, letterato, studioso di questioni educative, promotore infaticabile di varie iniziative culturali e pedagogiche – merita grande attenzione per diverse ragioni.

La prima è legata alla scoperta di una piccola miniera di documenti finora inesplorati che porta ulteriori elementi per la ricostruzione sempre più dettagliata della battaglia contro l'ignoranza e per lo sviluppo dell'istruzione primaria. La nuova documentazione dimostra – sostenuta da inoppugnabili dati statistici – che il modello scolastico previsto tra i 6 ed i 10-11 anni dalla legge Casati manifestò ben presto alcuni sostanziali limiti di fronte alle esigenze delle realtà rurali e come l'obbligo scolastico, peraltro blandamente previsto dalle norme del 1859, risultasse alla prova dei fatti in larga parte inefficace proprio negli ambienti di campagna.

Una storiografia filo statalista (d'impianto tanto di fede marxista quanto d'intonazione liberal-democratica) ha rappresentato per lungo tempo la battaglia contro l'analfabetismo come un affare proprio e specifico della scuola finanziata dallo Stato e gestita dai Comuni. In questo quadro è risultato del tutto oscurato (o stimato soluzione residuale) il contributo di idee e di risorse poste a disposizione da enti e privati. «In buona sostanza – annotano i due autori della ricerca – siamo dinanzi al caso di una storiografia che ha fatto proprio il punto di vista dei 'vincitori', ovvero che ha assunto come criterio interpretativo della

vicenda scolastica ed educativa postunitaria l'ideologia centralistica e statalista sottesa all'ordinamento scolastico casatiano» (pp. 15-16).

Le ricerche più recenti hanno rettificato questa visione e restituito una realtà assai più articolata nella quale convisse una molteplicità di attori. Non solo lo Stato (con risorse peraltro spesso insufficienti) e i Comuni, ma anche benefattori e filantropi, uomini di chiesa, sodalizi massonici, società di mutuo soccorso tutti interessati, ciascuno con motivazioni proprie, unirono le forze per far transitare anche la società italiana dall'ignoranza alla padronanza del leggere, dello scrivere e del far di conto.

In questa visione più plurale si situa vicenda di Gigli e dell'Associazione da lui promossa. Emerge tra le principali motivazioni della proposta degli asili-rurali la constatazione che l'impianto previsto dalla legge Casati modellato, come è noto, sulla scuola piemontese e lombarda, non era in grado di funzionare nelle realtà dove la scolarizzazione era, in partenza, alquanto più arretrata e dove l'immagine dell'infanzia non era ancora associata al bisogno di istruzione e persisteva strettamente legata alla funzionalità economica della famiglia. Perché inviare i figli a scuola se il loro destino non era quello di studiare?

Era proprio l'incapacità del rigido sistema casatiano che il Gigli e i suoi sodali individuavano come una delle principali ragioni della scarsa e spesso irregolare frequenza scolastica dei fanciulli che vivevano nei borghi di campagna. Il ritmo delle attività lavorative stagionali e il loro precoce inserimento nei ritmi della vita contadina mal si conciliavano con la regolarità standardizzata del calendario scolastico. Il risultato era che la frequenza risultava spesso saltuaria e in genere assai al di sotto delle aspettative ufficiali e soprattutto sproporzionata rispetto alle spese sostenute dai Comuni.

Quando, poi, i fanciulli raggiungevano l'età di 8-9 anni, le famiglie li impegnavano in piccole attività legate alla vita rurale. La scuola, se mai era cominciata, era lasciata senza farvi ritorno e solitamente senza aver raggiunto il minimo indispensabile dell'alfabetizzazione. Secondo gli animatori del sodalizio era un grave errore immaginare che fosse possibile che un unico modello scolastico potesse essere così efficace da soddisfare le esigenze connesse alla molteplicità delle realtà italiane.

Per rispondere in modo realistico alla varietà di situazioni i promotori dell'Associazione erano convinti che occorresse prevedere per le campagne una istituzione scolastica di tipo nuovo capace di integrare le caratteristiche proprie dell'asilo infantile aportiano (che, come noto, era destinato ai bambini tra i 3 ed i 6 anni) con una «scoletta dell'alfabeto» basata su poche, semplici, ma chiare nozioni rivolta ai bambini in età 6-8 anni. Tale asilo-scuola avrebbe dovuto sostituirsi nei villaggi e nelle zone agricole alle scuole elementari di grado inferiore che i Comuni erano obbligati ad aprire e che non di rado restavano semivuote.

Completata la scolarizzazione intorno agli 8 anni – età entro la quale solitamente i bambini restavano ancora fuori dell'attività adulta – era possibile

prevedere il raggiungimento di una sobria, ma efficace alfabetizzazione che si basava su quanto imparato anche prima dei 6 anni. Contrariamente a quanto si potrebbe immaginare gli asili-scuola non erano previsti per i poveri, ma avrebbero dovuto rivolgersi a largo spettro a tutta la popolazione scolastica rurale andando a sostituire il primo biennio della scuola elementare inferiore previsto dalla legge Casati.

La proposta fu corredata da qualche iniziativa avviata in forma sperimentale e da una serie di suggerimenti e indicazioni pratiche. Lo stesso Gigli s'impegnò a definire le caratteristiche dell'aula, delle suppellettili e dei sussidi necessari e individuò i possibili raccordi con le esigenze di contrastare l'analfabetismo anche tra i contadini adulti. Si trattava di un piano dettagliato e ad ampio raggio svolto non solo sul piano politico-scolastico ma anche su quello pedagogico, didattico ed economico-finanziario. Gli asili-scuola sarebbero dovuti infatti essere «a sgravio» dello Stato e cioè interamente sostenuti dall'iniziativa privata.

Un secondo meritevole apporto del lavoro di Ascenzi e Sani riguarda l'ampiezza di informazioni relative alla alfabetizzazione e scolarizzazione della realtà rurale. La proposta degli asili-scuola rurali – per quanto resti semplicemente a livello di progetto – aggiunge un tassello non secondario alla ricostruzione della storia dell'educazione popolare e della scuola elementare. Gigli e gli altri animatori dell'iniziativa fiorentina avevano ben presenti le differenze esistenti tra le diverse realtà scolastiche del tempo e di cui la stessa legge Casati era espressione, per esempio, quando inquadrava i maestri in numerose e diversificate classi stipendiali. Di questa varietà la ricostruzione storica ha finora tenuto in conto solo in parte.

Mentre infatti larga considerazione hanno avuto tra gli studiosi le differenze macrogeografiche (con le marcate e note differenze tra le aree settentrionali e quelle centro-meridionali) e, più recentemente, quelle di genere, (che hanno dimostrato come il recupero della frequenza femminile si sia compiuto soltanto a partire dagli ultimi decenni dell'Ottocento) assai più marginale è apparsa finora l'attenzione rivolta alla varietà sociologica e di aspettative tra mondo urbano e ambienti contadini.

Pochi contributi infatti si sono finora sforzati, ad esempio, di indagare la specificità dei processi di alfabetizzazione nel mondo contadino: segnale tra questi l'ampio saggio di Marino Raicich sulla maestra di campagna e i contributi di alcuni storici dell'agricoltura, tra i quali spiccano in specie quelli di Rossano Pazzagli. Qualche ulteriore indicazione emerge da studi condotti in aree specifiche come quelle montane della Valle d'Aosta e del Trentino.

La storia delle scuole di campagna è, dunque, ancora in gran parte da scrivere. Per quanto si può arguire dai pochi sondaggi fin qui compiuti, essa è destinata a riservare molte sorprese: i progressi della scolarizzazione, ad esempio, furono più lenti anche nelle zone ove più forte fu la spinta scolarizzatrice; si coglie inoltre un divario più marcato rispetto alle realtà urbane dell'alfabetizzazione maschile rispetto a quella femminile; del tutto inedito appare il rapporto tra

istruzione e iniziative per il rinnovamento agrario (con riferimento preferenziale agli adulti);

E ancora: una condizione dei maestri alquanto più incerta (basta pensare alla persistenza dei maestri precari e senza titoli fino ai primi del Novecento nelle cosiddette «scuole di villaggio»); il ruolo strategico (molto più evidente che nelle città) delle maestre che accettavano posti di insegnamento talvolta assai malagevoli e poco retribuiti e spesso si stabilivano in via definitiva là dove insegnavano fino a diventare la «signora maestra» di più generazioni; una circolazione dei libri di scuola non solo assai più disomogenea e frammentata, ma anche con una produzione specifica con apposite edizioni «a uso delle scuole rurali»; un'influenza della Chiesa attraverso i parroci molto più capillare e con rapporti assai più articolati con la scuola pubblica di quelli che si potrebbero immaginare se si resta fermi alle affermazioni di principio. Non era infatti raro che la maestra, specie se nubile, diventasse una figura di rilievo anche nella vita religiosa delle piccole comunità rurali.

Si tratta naturalmente di alcune suggestioni che andrebbero puntualmente esaminate e sostenute da ricerche specifiche.

C'è, infine, un terzo motivo di apprezzamento che riguarda la questione, già accennata all'inizio, della libertà scolastica. Il progetto del Gigli è quello di creare, a fianco del sistema scolastico governato dallo Stato e gestito dai Comuni, un sistema affidato alla libera iniziativa dei privati. Tale iniziativa avrebbe dovuto svolgersi mediante forme associative di carattere filantropico, proprio come si presentava l'Associazione degli asili-scuola.

Basta scorrere l'elenco dei principali sostenitori dell'iniziativa – da Nicola Matteucci a Terenzio Mamiani, da Nicolò Tommaseo a Raffaello Lambruschini tutti grandi sostenitori di una larga libertà di insegnamento – per avere solida conferma della diffidenza con cui era vista un'interpretazione troppo filo statalista della legge Casati. La legge, come è risaputo, era nata con l'intento di percorrere una via mediana tra l'idea dello Stato etico coltivata in taluni ambienti liberali e l'idea di un *laissez faire* che sosteneva invece altri settori del liberalismo.

Le due diverse opzioni che animavano la concezione laica della scuola erano state al centro di ampie discussioni già nel Piemonte di Cavour e aveva avuto uno dei suoi più significativi momenti nel confronto tra Domenico Berti e Bertrando Spaventa sulle colonne del giornale «Il Risorgimento» agli inizi degli anni '50. E mentre il primo si era espresso a favore di una scuola certamente guidata dallo Stato, ma affidata oggi diremmo alla capacità della società di farsene carico – secondo un modello che giungeva in Piemonte dalle esperienze inglesi –, Spaventa era invece dell'avviso che spettasse allo Stato farsi «educatore» in quanto garante della libertà e dei valori laici (e nel caso dell'istruzione primaria per delega ai Comuni).

Le complesse vicende che accompagnarono l'Associazione Nazionale degli Asili Rurali e la spiegazione del loro insuccesso sono poco comprensibili se

non sono inquadrare all'interno del dibattito sulla libertà di insegnamento e il prevalere negli anni immediatamente successivi all'Unità di un'interpretazione accentuatamente monopolista. La libertà riconosciuta ai privati di aprire e gestire scuole si infatti andò rapidamente ridimensionando.

Secondo Matteucci, Gigli e gli altri animatori del sodalizio occorreva invertire questa tendenza: difendere la libertà di insegnamento significava rafforzare la forza dell'istruzione. La scuola non andava presentata come un «obbligo» (di qui l'avversione verso forme coercitive di frequenza scolastica come l'obbligo d'istruzione sancito per legge), ma come una «opportunità» che, con il trascorrere del tempo, si sarebbe affermata senza scontrarsi con le diffidenze che, invece, il sistema forzato dell'obbligo poteva produrre.

Quando il gruppo promotore diede vita all'Associazione per gli asili-scuola la partita per la libertà di insegnamento era tuttavia ormai già perduta. Con l'esautoramento di Berti e l'avvento di Michele Coppino al Ministero dell'Istruzione nel 1867 si verificò una netta inversione della politica scolastica nell'alveo stesso della Destra storica, nel senso di un forte processo di accentramento. Il primo segnale inviato dal Coppino fu molto indicativo: i provveditori furono posti alle dipendenze dei prefetti e i compiti degli ispettori furono rafforzati.

Con il ministro Cesare Correnti, lungamente a capo del Ministero nel cui apparato amministrativo sempre maggiori spazi occupò Pasquale Villari, si verificò il rafforzamento del controllo centralistico su ogni aspetto della vita scolastica del tempo. Forte era il timore, rafforzato specialmente dopo il 1870, che l'ampliamento degli spazi di libertà potesse favorire le scuole confessionali e il ritorno dell'educazione scolastica nelle mani della Chiesa. A fronte della grave situazione scolastica del Mezzogiorno, inoltre, sembrava irrealistico pensare che l'analfabetismo potesse venire debellato soltanto con l'intervento delle forze private.

L'idea dello Stato educatore percorse tra la fine degli anni '60 e il principiare del decennio successivo larga parte della cultura liberale. Le vicende del *Kulturkampf* in Germania, le politiche scolastiche della Terza Repubblica in Francia e la questione romana diedero la spinta definitiva in senso centralistico e monopolistico e, dunque, in senso del tutto contrario all'estensione della libertà scolastica.

La prospettiva di porre mano alla legge Casati per modificarla nel senso auspicato dai sostenitori degli asili rurali e, dunque, aprire spazi all'intervento dei privati scontò una realtà politica ormai orientata in altra direzione. Inevitabile fu il rapido declino fino al totale esaurimento del progetto immaginato da Ottavio Gigli.

## Gianfranco Bandini

Quando si scrive un testo a commento di un altro, spesso ci si concentra subito sulla struttura del volume, sulle sue caratteristiche generali e di dettaglio, sull'analisi delle sue parti di rilievo, sul confronto con la storiografia. Vorrei, invece, partire da un altro presupposto che è pratica più usuale nell'analisi della letteratura, ma che può dare dei buoni risultati anche se applicato ai saggi e alla loro organizzazione linguistica inevitabilmente razionale e argomentata. Qualsiasi lettura, infatti, è un incontro tra persone e tra mondi interni che vengono messi in comunicazione. Per questo le prime impressioni di lettura non sono trascurabili e possono dare il senso complessivo del volume, o meglio, di quel particolare significato che ha assunto per il lettore. Partirò, quindi, da ciò che mi è venuto in mente subito dopo aver preso in mano il testo, letto il titolo, avviata la lettura dell'introduzione e del primo capitolo del lavoro di Anna Ascenzi e Roberto Sani.

Era la memoria di un altro scritto, molto lontano nel tempo, ma le cui parole affioravano con chiarezza proprio durante l'approfondimento della vita e delle opere di Ottavio Gigli. Si trattava di un interessante articolo di Nicola Gallerano che agli inizi degli anni Ottanta si occupava di vari problemi metodologici e storiografici con una forte attenzione per il contesto internazionale. Parlando delle tendenze dell'ampia comunità degli storici americani, ne riassumeva due caratteristici stili di indagine con una descrizione quanto mai arguta e calzante (ripresa da Lawrence Stone)<sup>7</sup>: da un lato gli storici che cercano i tartufi, sempre con lo sguardo rivolto a accadimenti specifici, con una spiccata predilezione per la ricerca locale; dall'altro gli storici che, al pari dei paracadutisti, si lanciano dall'alto e cercano di avere una visione molto ampia del terreno sottostante. Le due tipologie spesso sono state praticate e vissute come antitetiche ed entrambe hanno delle problematiche difficilmente eludibili. Tuttavia non si tratta di un contrasto così netto come può apparire a un primo sguardo: di fatto la storiografia è costituita sia da tendenze macro che micro (senza scomodare, in questo caso, la microstoria ma utilizzando il termine semplicemente come l'altro polo dell'oscillazione della ricerca). La storia, di fatto, è viva solo se mantiene un dialogo continuo tra le due dimensioni.

Il volume *«Un'altra scuola... per un altro paese»* si apre con una bella introduzione che ci offre una prospettiva di ampio respiro, di inquadramento generale della questione. Collocare la ricerca specifica all'interno della storiografia serve a mettere in evidenza il disinteresse per la figura di Ottaviano

<sup>7</sup> N. Gallerano, *Cercatori di tartufi contro paracadutisti: tendenze recenti della storiografia sociale americana*, «Passato e Presente», vol. 2, n. 4, 1983, pp. 181-189. Cfr. inoltre, N. Gallerano, *Le verità della storia. Scritti sull'uso pubblico del passato*, Roma, Manifestolibri, 1999.



Gigli, per le sue attività e per l'insieme delle persone che lo hanno sostenuto nel tempo. È quindi la sottolineatura, assolutamente condivisibile, di una assenza della tematica o, se vogliamo, di alcuni sporadici e limitati interessi. Le pagine successive del volume, nel dipanarsi dei capitoli, fino alla ricchissima appendice, perseguono invece una prospettiva di dettagliato e documentato approfondimento della questione. Di fatto troviamo proprio all'interno dello stesso testo un ricco dialogo tra «paracadutisti» e «cercatori di tartufi»: una modalità di analisi estremamente efficace che ci dà modo di ragionare sulle due dimensioni della ricerca storica e di farlo attraverso una rete di connessioni tra il testo, le note, l'apparato di documentazione.

Sicuramente i fatti descritti appartengono a una delle linee morte della storia, a prospettive di cambiamento che a un certo punto si sono arenate, sono state ostacolate e bloccate. Forse si potrebbe addirittura fare una storia «controfattuale», come hanno tentato di fare alcuni quantitativisti ormai mezzo secolo fa<sup>8</sup>. Pur non aderendo a quella impostazione, molto contestata e oggi alquanto in disuso, ci sono alcuni elementi di riflessione che possono essere ancora interessanti perché ci invitano a prestare attenzione alle molte variabili della storia<sup>9</sup>; ci allenano ad essere sensibili alle tante diramazioni e ai diversi contesti, sia locali che nazionali.

Come si fa notare nelle pagine introduttive, la prevalente storiografia dei «vincitori»<sup>10</sup> ha selezionato gli argomenti di cui trattare in modo che fossero congruenti con ciò che alla fine avrebbe prevalso; ha quindi fornito un'immagine delle vicende storiche unidimensionale, quasi fossero sostenute dalla tendenza teleologica verso un preciso e determinato scopo. Una modalità di studio che, secondo gli Autori, è stata sostenuta da una visione statalista che gli studiosi italiani hanno coltivato a lungo, forse come conseguenza di visioni ideologiche del presente che assegnavano al ruolo dello stato un valore fondamentale, se non esclusivo, nella gestione della cosa pubblica e della vita della comunità.

Personalmente credo che non sia stato il solo e esclusivo fattore di sviluppo di una storiografia così attenta alla dimensione nazionale e statale, a discapito delle molte storie che hanno contrassegnato il processo di *nation building*. Più dello statalismo ha pesato una prospettiva di ricerca storica che non si è confrontata a sufficienza con le innovazioni portate dalla *social history*. La storia dell'educazione italiana, prendendo l'abbrivio da una storia della pedagogia di impronta filosofica (poi innestata col marxismo e con varie altre

<sup>8</sup> Cfr. R.W. Fogel, *Railroads and American Economic Growth: Essays in Econometric History*, Baltimore, Johns Hopkins Press, 1964.

<sup>9</sup> Cfr. B. Martin, *Counterfactual History. A User's Guide*, «The American Historical Review», vol. 109, n. 3, 2004, pp. 845-858; C. Randall, *Turning Points, Bottlenecks, and the Fallacies of Counterfactual History*, «Sociological Forum», vol. 22, n. 3, 2007, pp. 1573-7861.

<sup>10</sup> Ascenzi, Sani, «Un'altra scuola... per un altro paese». *Ottavio Gigli e l'Associazione nazionale per la fondazione di Asili rurali per l'infanzia tra lotta all'analfabetismo e Nation building (1866-1873)*, cit., p. 15.

impostazioni) ha sempre privilegiato la storia delle idee piuttosto che l'analisi dei contesti di vita; si è concentrata sui classici, sulla storia dei grandi autori della riflessione educativa oppure si è dedicata alla ricostruzione delle vicende politico-normative, con una decisa predilezione per le vicende nazionali (quindi, con poca considerazione della storia locale, ma al tempo stesso anche per una dimensione comparativa, per esempio). Se si fosse utilizzato più spesso un approccio di storia sociale (o di storia socio-culturale<sup>11</sup>) si sarebbero portate alla luce vicende come quelle ricostruite da Ascenzi e Sani, partendo dal basso, come si diceva in anni passati, per vedere cosa aveva prodotto la compagine sociale. Quando ciò accade si possono fare scoperte molto interessanti che, al di là di categorie interpretative monolitiche, permettono di distinguere le molte posizioni (sia teoriche che pratiche) esistenti all'interno dei cattolici o dei massoni, per esempio.

Alcune di queste vicende dimenticate possono essere agevolmente inserite in una storia delle minoranze pedagogiche, perlomeno se limitiamo il nostro sguardo solo all'ambito educativo, perché in realtà possiamo parlare di minoranze culturali<sup>12</sup>. Non possiamo dimenticare, ad esempio, tutte le vicende della repressione dell'evangelismo, tra le quali la Toscana occupa un posto di rilievo: pochi anni prima dell'Unità si poteva andare in galera semplicemente per aver riunito a casa propria delle persone per leggere una Bibbia. Negli anni tumultuosi della fine del Granducato ci sono stati casi molto famosi come il sequestro di 3.000 esemplari dell'edizione Martini del Nuovo Testamento, edizione illegale perché senza note (il 18 maggio 1849, con condanna pecuniaria del tipografo) oppure nel 1851 (il 19 gennaio) l'irruzione dei gendarmi nella cappella svizzera di Firenze per individuare i toscani che la frequentavano (visto che il culto evangelico era consentito e tollerato solo per gli stranieri residenti)<sup>13</sup>.

Ma il caso che sollevò lo sdegno dei protestanti europei (e in special modo inglesi) fu l'arresto dei coniugi Francesco Madiari e Rosa Pullini (il 17 agosto 1851), messi sotto processo per «propaganda contraria alla religione di stato». Il marito fu condannato a quattro anni e dieci mesi di lavori forzati e la moglie a tre anni e nove mesi in una casa di correzione. Una condanna durissima dei due toscani (ai quali il Granduca non concesse la grazia) e poco conforme alla normativa settecentesca che in realtà si applicava al proselitismo acattolico in pubblico, ma non negli ambienti domestici. Scriveva a questo proposito Giorgio Spini: «Ancora oggi, in questo ferreo secolo di persecuzioni ideologiche e di campi di concentramento, il caso di due brave persone trattate come criminali

<sup>11</sup> Cfr. A.M. Banti, S. Magri, *Storie e microstorie: l'histoire sociale contemporaine en Italie (1972-1989)*, «Genèses», vol. 3, n. 1, 1991. pp. 134-147.

<sup>12</sup> Si veda, come esempio di questo tipo di impostazione della ricerca storica, il pionieristico lavoro di G. Spini, *L'evangelo e il berretto frigio. Storia della chiesa cristiana libera in Italia 1870-1904*, Torino, Claudiana, 1971.

<sup>13</sup> G. Spini, *Risorgimento e protestanti*, Torino, Claudiana, 1998, 2<sup>a</sup> ediz. riveduta e ampliata (prima ediz.: Napoli, 1956), pp. 229 ss.

solo per motivi religiosi susciterebbe scandalo o pietà. Ma nel romantico Ottocento, ed in una situazione psicologica come quella inglese [...], provoca addirittura il finimondo»<sup>14</sup>.

È interessante notare quanto la classe dirigente risorgimentale fosse attenta al contesto estero; tuttavia, come abbiamo visto nel caso Madiari, il ceto intellettuale a volte non riusciva a comprendere a fondo la diversità delle situazioni e quanto pesasse il loro scarso rapporto con gran parte della popolazione. Se confrontiamo, anche sommariamente, il contesto della penisola (e in particolare nel Granducato, molto ricco di fermenti intellettuali e educativi), con l'Inghilterra, ci accorgiamo bene del divario, soprattutto per quanto riguarda il rapporto tra le istituzioni civili e le chiese. Mentre in Inghilterra «le lotte per la separazione tra Stato e Chiesa furono il naturale corollario della campagna per l'emancipazione religiosa»<sup>15</sup>, il Regno d'Italia è segnato da un dissidio fortissimo che si inasprisce dopo il 1870 (con la chiusura anticipata del Concilio Vaticano I) ed è destinato a influenzare a lungo il dibattito culturale e politico.

Un elemento importante della storia di Ottavio Gigli è il contatto con esponenti massonici. Merita davvero porre attenzione, come fa il volume di Ascenzi e Sani in più punti, al contributo che dettero le singole persone all'idea degli Asili rurali, partendo da posizioni intellettuali molto diverse ed anche contrastanti tra loro. Bisogna notare che la massoneria era partita da convinte posizioni spiritualiste, definibili come deiste (e certamente eretiche per la chiesa cattolica), che credevano alla presenza del grande architetto dell'universo. Non erano quindi posizioni materialiste e originariamente nemmeno anticlericali. Tuttavia verso la fine dell'Ottocento la massoneria italiana, come succede in situazioni analoghe in Europa<sup>16</sup>, prende una via sempre più anticlericale<sup>17</sup>; ciò accade quanto il forte contrasto con la Chiesa Cattolica inasprisce le posizioni da entrambe le parti e i moderati a un certo punto non hanno più spazi né di azione né di dibattito. La dialettica tra posizioni diverse si indebolisce sempre di più perché solo pochi riescono a trovare degli spazi di mediazione. Uno di questi spazi è rappresentato proprio dalla questione degli Asili rurali e dal dibattito sull'analfabetismo. Possiamo constatare chiaramente questo convergere di interessi nella composizione del sodalizio per gli Asili rurali e nell'ironico giudizio che ne dà la Civiltà Cattolica, definendolo una compagnia

<sup>14</sup> *Ibid.*, pp. 259-260.

<sup>15</sup> N. Davies, *Isole. Storia dell'Inghilterra, della Scozia, del Galles e dell'Irlanda*, Milano, B. Mondadori, 2004, p. 591.

<sup>16</sup> Cfr. M.C. Jacob, *Living the Enlightenment. Freemasonry and Politics in Eighteenth-century Europe*, New York, Oxford University Press, 1991; L.P. Martin (dir.), *Les francs-maçons dans la cité. Les cultures politiques de la Francmaçonnerie en Europe, XIX<sup>e</sup>-XX<sup>e</sup> siècles*, Rennes, Presses Universitaires de Rennes, 2000.

<sup>17</sup> Cfr. G.M. Cazzaniga (ed.), *La massoneria. Annali*, 21, Torino, Einaudi, 2006; F. Conti, *Storia della massoneria italiana. Dal Risorgimento al fascismo*, Bologna, il Mulino, 2003.

tutta «frammassonica»: «Gino Capponi, Bettino Ricasoli, Carlo Matteucci, Terenzio Mamiani e Ottavio Gigli, tutti farina da far ostie, e degnissimi certamente di esser stati scelti dalla Provvidenza per assistere ed illuminare lo zelo pastorale dei Vescovi e dei Parrochi. Giacché bisogna notare che i cinque prelodati Signori, notissimi quasi tutti per settarii matricolati, hanno iniziata la redenzione delle plebi; ossia una società per la fondazione di asili rurali per l'infanzia»<sup>18</sup>.

Proprio perché su alcuni temi questi uomini avevano trovato un accordo di carattere pratico e operativo, vengono tutti facilmente etichettati come massoni. Possiamo sostenere a buon ragione, invece, che stessero rivendicando un loro distanziamento dalle posizioni più rigide e ufficiali: si badi bene, non soltanto dalle posizioni della Chiesa Cattolica, ma anche da quelle della massoneria più intransigente. Una visione storiografia monolitica, centrata sui grandi temi del dibattito politico-normativo, perde di vista questo dibattito interno e di fatto rischia di adottare gli stessi rigidi metri di giudizio del dibattito ottocentesco, non effettuando un necessario distanziamento dalle fonti.

Certamente la massoneria sostiene le attività di Gigli (ed in genere le più avanzate idee educative del tempo). È interessante scorrere l'elenco dei collaboratori nel 1873, quasi al termine della vita dell'Associazione Nazionale degli Asili Rurali per l'Infanzia: era massone il presidente Terenzio Mamiani e almeno un membro della Direzione, Michele Coppino; nel Comitato Centrale possiamo inoltre leggere i nomi di massoni di rilievo come Francesco De Sanctis, Michele Amari, Angelo Bargoni, Domenico Berti, Agostino Depretis, Giovanni Lanza e Quintino Sella<sup>19</sup>.

Tuttavia dobbiamo guardarci dal considerare la massoneria come un insieme compatto perché su alcuni temi è chiaramente divisa, spesso non riesce a trovare una linea unitaria e nel corso del tempo è soggetta a variazioni di grande interesse. Per quanto riguarda la questione degli Asili rurali possiamo notare che Terenzio Mamiani, tra i primi sostenitori di Gigli, era favorevole a una visione decentrata, in questo seguito da personaggi di rilievo come Domenico Berti; ma altri, come Michele Coppino, la pensavano in modo diametralmente opposto e la stessa fine dell'esperienza del sodalizio è contrassegnata dalle posizioni centralistiche di Cesare Correnti, del resto assai vicino alle idealità massoniche.

Anche su un piano culturale più generale troviamo delle simili contrapposizioni. Si pensi ad un tema di grande portata come la legittimità della conquista armata dei territori delle popolazioni africane: da un lato Arcangelo Ghisleri mostrava empatia e rispetto per le altre culture; dall'altro Giovanni Bovio riteneva che

<sup>18</sup> Cit. in Ascenzi, Sani, «Un'altra scuola... per un altro paese». *Ottavio Gigli e l'Associazione nazionale per la fondazione di Asili rurali per l'infanzia tra lotta all'analfabetismo e Nation building (1866-1873)*, cit., p. 78.

<sup>19</sup> Giovanni Lanza e Quintino Sella vengono definiti così da «La Civiltà Cattolica» (cfr. vol. 10, n. 836, 1885, p. 244).

fosse un preciso dovere dell'Italia imporsi sulle civiltà inferiori, anche con la forza se ciò si rendeva necessario<sup>20</sup>.

In conclusione mi pare che possiamo essere molto grati a Anna Ascenzi e Roberto Sani per averci consentito di approfondire aspetti del tutto sconosciuti della storia educativa o, al massimo, conosciuti solo per piccoli cenni nella storiografia corrente. Cogliendo il dibattito interno alle varie posizioni ideali si può veramente costruire una ricerca a più dimensioni che restituisce un ritratto a tutto tondo di una iniziativa che raccolse le energie migliori della nazione. Intellettuali che riuscivano a mettere da parte, reciprocamente (e credo sia una lezione anche per il nostro presente), i giudizi a volte sferzanti e molto duri che esprimevano nei confronti delle posizioni culturali degli altri, per creare uno spazio di dialogo sui problemi concreti. Dalla lettura del libro ci accorgiamo che emerge una lezione di alta pedagogia, caratterizzata dall'apertura mentale, dalla preoccupazione per il miglioramento delle condizioni di vita della popolazione, da un apprezzabile cosmopolitismo, aspetti che consentivano una visione più dialogica e viva della cultura, qualcosa di cui l'Italia è stata purtroppo spesso carente.

<sup>20</sup> G. Bandini, *Rappresentazioni della nazione e razzismo nella geografia scolastica tra Otto e Novecento*, in Id. (a cura di), *Manuali, sussidi e didattica della geografia. Una prospettiva storica*, Firenze, Firenze University Press, 2012, pp. 62 ss.



# Between History and Historiography

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**ABSTRACT:** This paper focuses attention about the recent book of Luigiaurelio Pomante entitled *Between History and Historiography. Research on Contemporary Italian University* to draw a synthetic balance on the main nodes historiographical relating to higher education in Italy. The A. is particularly interested about the origins and evolution of the university organization from the unification to the II post-war period, with a particular attention to the real peculiarity of the Italian system: the so-called 'minor universities'. Then, secondly, he focuses on the rise of e-learning in the Italian university system and on the main results achieved by the recent historiography on the history of Italian universities.

**EET/TEE KEYWORDS:** University; History; Education System; Italy; XX-XXI<sup>th</sup> Centuries.

El libro escrito por el profesor Luigiaurelio Pomante, titulado *Between History and Historiography*<sup>1</sup>, es un trabajo de investigación magnífico sobre la evolución de las universidades italianas contemporáneas. En cuatro capítulos facilita una información relevante sobre la evolución de la normativa referida a la enseñanza superior y universitaria, la creación de diversos tipos de universidades y la importancia que las pequeñas universidades de provincia pudieron tener en el progreso cultural del país. En la descripción de los diversos tipos de universidades, Pomante dedica un capítulo a la progresiva creación de universidades on-line, algo que resulta muy interesante para que la visión del sistema universitario no quede anclada en el conocimiento de la universidad tradicional, sino que se refleje en toda su amplitud. Esta obra es muy valiosa para los historiadores de la educación y, más concretamente, de la universidad y de la educación superior, porque nos ayuda a conocer la organización y la estructura de las universidades italianas, además de ponernos al corriente de los cambios experimentados en la actualidad con la utilización de E-learning.

<sup>1</sup> L. Pomante, *Between History and Historiography. Research on Contemporary Italian University*, Macerata, eum, 2014.

Los capítulos dedicados a la historiografía y a las fuentes de consulta relativas a la educación universitaria y superior son un instrumento extraordinario para que los investigadores conozcamos las publicaciones que se han realizado hasta el momento y también las fuentes que podemos consultar para desarrollar estudios relativos a la educación superior y universitaria en Italia.

En el primer capítulo, el autor pone de manifiesto las características más peculiares del sistema universitario italiano, destacando la importancia de las universidades de provincia desde la unificación nacional hasta después de la Segunda Guerra Mundial. El interés por estas instituciones, que eran las pequeñas universidades establecidas en ciudades menor tamaño, tomó un auge inusitado durante los siglos XIX y XX, en su relación con el proceso de constitución nacional y la redefinición de centro, periferia y ciudad-nación y en la formación de las clases dominantes. El autor de este libro utiliza diversas fuentes, entre las que se encuentran las obras del profesor Gian Paolo Brizzi, tituladas: *La storia delle università in Italia, L'organizzazione della ricerca nel XX secolo*<sup>2</sup> y, la escrita conjuntamente con Jacques Verger *Le Università minori in Europa*<sup>3</sup>. El autor señala que estas instituciones fueron relevantes en la creación y evolución de la educación superior en Italia, en la actividad cultural, desarrollo de las poblaciones y de la economía de las pequeñas ciudades y que respondía a un proceso de reorganización y reforma del sistema universitario comenzado en Francia y en los territorios directa o indirectamente contralados por el Imperio napoleónico. Gian Paolo Brizzi ha realizado una importante aportación sobre la reforma de las universidades y de los colegios mayores, la cual fue pródiga por el Papa Pio VII, después de 1815, y que fue implementada por su sucesor, León XII, con la promulgación del *Quod Divina Sapiencia*, el 28 de agosto de 1824. La distinción entre universidad menor y mayor parece que se basaba en que sus facultades fueran más o menos completas, teniendo en cuenta el número de cátedras, características de sus ciencias y dotaciones (librerías, laboratorios, etc.). Desde la Ley de 31 de junio de 1862, que recoge la clasificación entre universidades de mayor (primer nivel) y menor (segundo nivel), y el Reglamento en el que se redefine las reglas relativas a los salarios y la igualdad en el establecimiento de las tasas. El autor realiza un recorrido sobre la normativa relacionada con el sistema educativo superior y universitario que potencia diversas reformas, como es el cambio introducido en 1895 por un nuevo plan de organización y estructura de las Universidades italianas; la Ley de 22 de diciembre de 1901, en que la Universidad de Macerata obtuvo la igualdad con las de primer nivel; el Real decreto de 30 de septiembre de 1923, que establece

<sup>2</sup> G.P. Brizzi, *La storia delle università in Italia: l'organizzazione della ricerca nel XX secolo*, in L. Sitran Rea (ed.), *La storia delle università italiane. Archivi, fonti, indirizzi di ricerca. Atti del convegno. Padova, 27-29 ottobre 1994*, Trieste, Edizioni Lint, 1996, pp. 273-309.

<sup>3</sup> G.P. Brizzi, J. Verger (edd.), *Le Università minori in Europa (secoli XV-XIX). Atti del Convegno Internazionale di Studi. Alghero, 30 ottobre - 2 novembre 1996*, Soveria Mannelli, Rubbettino, 1998.



la especialización de las actividades de investigación y los syllabus de estas universidades, de acuerdo con sus peculiaridades económicas y productivas y las necesidades del mercado. La reforma de 1923, llevada a cabo por Giovanni Gentile y basada en una visión elitista de la Universidad; el Real Decreto de 20 de junio de 1935, que introdujo una nueva reorganización de la educación superior, promovido por el ministro Cesare De Vecchi, del que el autor destaca la estabilidad económica que produjo en las universidades de las más pequeñas ciudades mediante la adecuación de los recursos financieros a expensas del estado. Posteriormente, destaca el proyecto de reorganización y reforma general del sistema universitario, presentado en 1951 por el ministro Guido Gonella, por el que se reconoce la autonomía universitaria. Posteriormente, se produjo un fenómeno de descentralización, con la creación de un número importante de pequeñas Universidades, como «sucursales» y «polos descentralizados» de las ya existentes para mejorar la formación universitaria y fomentarla mediante la proximidad geográfica de estas instituciones, que favoreciese el acceso a las clases más bajas.

En el capítulo segundo, Luigiaurelio Pomante proporciona una información muy valiosa y detallada que completa la evolución de las Universidades tradicionales, con un nuevo y actual modelo de Universidades propiciado por la introducción de e-learning y la innovación del proceso de educación tradicional (2003-2013). En este capítulo se hace un recorrido normativo y también se habla de las primeras Universidades on-line y centros que impulsaron este nuevo modelo de enseñanza. El artículo 92 del Decreto de 11 de julio de 1980 reconoce nuevos métodos de enseñanza en Universidades y enseñanza superior, además de la creación de «inter-university consortium» o «consozio interuniversitario», con objeto de hacer más fructífera la actividad educativa. La Ley de 19 de noviembre de 1990, para la reforma del sistema universitario italiano, concedía autonomía a las universidades y un soporte financiero para iniciativas de educación a distancia. La primera legislación en el campo de e-learning y Universidad a distancia, fue el Decreto de 17 de abril de 2003, que establece el reconocimiento de la educación a distancia en las Universidades italianas, que propició la creación de una nueva modalidad de universidades llamadas on-line. El autor destaca que este cambio estuvo influido por el modelo UNED (Universidad Nacional de Educación a Distancia) establecido en España en 1972 y por el de la UAB (Universidade Aberta de Portugal) de 1988. Desde los años noventa, se fueron abriendo centro con el objetivo de impulsar la innovación educativa y las universidades dentro del sistema e-learning y a distancia. Tal es el caso del Consorcio para la Universidad a distancia, desde los años noventa, ha promocionado cursos a distancia en el campo de información tecnológica y económica. En 1992, el Consorcio Nettuno intentó impulsar la educación a distancia mediante el uso del satélite Olimpús. En la Universidad de Ferrara, durante el curso académico 1996-97, se creó el CARID (Centro di Ateneo per la Ricerca e L'Innovazione

Didattica), que es uno de los primeros centros especializados en investigación. El Consiglio Universitario Nazionale (CUN), creado el 13 de junio de 2003, es un órgano de asesoramiento y recomendaciones al Ministerio de Educación, Universidad e Investigación sobre asuntos considerados relevantes, como los programas nacionales, las políticas y las prácticas administrativas que afectan a la educación superior, la clasificación y definición de los campos académicos y la docencia y la investigación, entre otras cuestiones, que ha propiciado cursos de educación a distancia y la creación de nuevas Universidades a distancia, tanto públicas como privadas. En la ciudad de Macerata también se creó el CELFI (Centro di Ateneo per l'E-learning e la Formazione Integrata), dirigido por Pier Giuseppe Rossi, profesor de la Universidad de Macerata, cuyo objetivo principal es impulsar un modelo de enseñanza e investigación con los más modernos métodos tecnológicos. Algunas de las Universidades creadas en el campo e-learning y distancia, son: Universidad «Guglielmo Marconi» (1 de marzo de 2004); Universidad «Leonardo Da Vinci», que se fundó por Decreto 27 de octubre de 2004; Universidad «Uninettuno» creada el 15 de mayo de 2005; Universidad «Giustino Fortunato» (2006). En 2010, el CNVSU publicó un report analizando la situación de las Universidades telemáticas, determinando un pequeño número de demandantes de educación a distancia en comparación con el gran número de universidades y cursos.

Luigiaurelio Pomante consciente de la importancia de los aspectos historiográficos para los investigadores de la historia de las Universidades y, más concretamente de las italianas, dedica el capítulo tercero a los estudios e investigaciones que se han realizado sobre las Universidades italianas y los sistemas de educación superior en los últimos veinte años. Es la primera vez que se realiza un estudio sistemático y completo sobre las líneas de investigación sobre la historia de las Universidades en Italia, que posibilita el estudio y análisis comparado desde la historiografía internacional. Sin duda, se trata de un texto que nos facilita el conocimiento de los centros, publicaciones y conferencias, que se han desarrollado en Italia en relación con el tema tratado. Comenzando por la creación de Unistoria, en diciembre de 1991, que es un Centro interuniversitario de estudios de la historia de las Universidades dirigido por Aldo Mazzacane, y que cuenta con publicaciones, conferencias y seminarios. El autor menciona como especialmente interesante la reunión celebrada en Siena en 1989, con el título «L'Università ieri e oggi, offerta formativa e domanda sociale», en la que se hizo patente la importancia del Sistema Universitario y de educación superior en el proceso de construcción nacional. También, hace hincapié en la participación de Mauro Moretti, Umberto Massimo Miozzi y su división de la historia de las Universidades en tres periodos, y las contribuciones de Gian Paolo Brizzi, Aldo Mazzacane y Antonio Cardini. En dicha reunión participaron, entre otros, Mauro Moretti. En Padova, del 27 al 29 de octubre de 1994, tuvo lugar una conferencia titulada «Storia delle università italiane», sobre archivos y fuentes de investigación. En 1994, se publicó el primer repertorio nacional de la historia de

la Universidad por Gian Paolo Brizzi, el cual fue nombrado secretario del CISUI (Centro Interuniversitario para la Historia de las Universidades Italianas), que fue creado en 1996 en la ciudad de Bolonia y en el que algunos investigadores hemos tenido el privilegio de acceder a sus magníficos fondos bibliográficos, puesto que es un punto fundamental de referencia para la investigación de la historia de las Universidades en Italia y Europa. El CISUI comenzó a publicar, en 1997, la magnífica revista denominada «Annali di storia della università italiane», además de realizar diversas conferencias y seminarios internacionales. En diciembre de 2001 se celebró la conferencia de Parma titulada «Gesuiti e università in Europa (secoli XVI-XVIII)»; en abril de 2004, tuvo lugar la conferencia de Messina con el título «Gli Statuti Universitari»; Pomante hace mención a las ponencias de Simonetta Polenghi, titulada *La política universitaria italiana nell'età della Destra storica (1848-1876)*<sup>4</sup>; G. Vicarelli, que habló de los graduados en Leyes y Medicina; A. Galbani, con un interesante trabajo sobre la presencia de las mujeres en las facultades científicas y politécnicas y en las instituciones de investigación. En 2006 se produjeron dos encuentros muy importantes sobre estudios históricos en Padova y Bolonia, primero, y en Aosta, en segundo lugar, dedicados a la Universidad Napoleónica y la historia de la Universidad, respectivamente, el autor de este libro destaca la intervención de Andrea Romano que disertó sobre la evolución del principio de libertad de enseñanza. Uno de los Congresos Internacionales más recientes fue el celebrado en la Universidad de Pavia en junio de 2011, del que el autor resalta el interés de la conferencia promovida por el CISUI, con el título: «Le Università e L'Unità d'Italia (1848-1870)».

El cuarto capítulo nos facilita una fabulosa información sobre los archivos de las Universidades italianas y la organización de la investigación histórica dentro de la educación superior. Este capítulo resulta de gran utilidad para los investigadores de la historia de las Universidades, nos acerca a las fuentes y a los archivos de manera muy rigurosa y sistemática. Se alude a la figura de Leopoldo Sandri, profesor de la Universidad de La Sapienza (Roma), que es considerado uno de los padres de la archivística italiana. De igual manera se menciona la Escuela Especial de Archiveros y Bibliotecarios, porque sin instituciones y personas dedicadas a organizar, cuidar y proporcionar esas fuentes documentales en los archivos y en las bibliotecas la investigación sería prácticamente imposible. El autor hace mención a los problemas que existen en algunos archivos de pequeñas ciudades de provincia e incluso en el Archivo Central del Estado, puesto que en algunos casos los fondos no están ordenados, están dispersos o desaparecidos, a veces fruto de la negligencia. Las Universidades más antiguas y más importantes tuvieron una situación más favorable durante la pre-unificación, cuyos fondos se conservan en los archivos del Gobierno,

<sup>4</sup> S. Polenghi, *La politica universitaria italiana nell'età della Destra storica (1848-1876)*, Brescia, La Scuola, 1993.

mientras que después de la unificación, los documentos se han preservado en las propias Universidades. En la última década del siglo XX han proliferado las investigaciones y los centros especializados dedicados al estudio de fuentes, análisis histórico de Universidades y sistemas de educación en Italia durante los siglos XIX y XX. En este capítulo, se vuelve a mencionar la importancia del Centro Unistoria y del CISUI, como no podría ser de otra manera. Además, se hace referencia a los Centros de Historia de las Universidades establecidos en las Universidades de Bolonia (1906), Padova (1922) y en otras Universidades de Ferrara, Génova, Macerata, etc. El libro titulado *La storia delle università italiane. Archivi, fonti, indirizzi di ricerca*<sup>5</sup>, es una de las obras de mayor interés para los investigadores. Luigiaurelio Pomante también nos aporta información sobre las principales revistas italianas sobre la historia de las Universidades, siendo la más antigua: «Quaderni per la storia dell'Università di Pavia» y la más moderna «Annali di storia delle università italiane», como se señaló anteriormente, editado por el CISUI.

<sup>5</sup> Sitran Rea (ed.), *La storia delle università italiane. Archivi, fonti, indirizzi di ricerca. Atti del convegno. Padova, 27-29 ottobre 1994*, cit.

# About «Space and Place in Children's Literature, 1789 to the Present»

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**ABSTRACT:** The collection under review is a furthering of the more generic research on space and place in literature. Space is one of the fundamental coordinates in human activities as well as in literature, and its importance is self evident. However, due to its elusive nature, progress in the field is continuous but slow. This collection begins with Peter Hunt's elucidation of the theoretical implications of the importance of space and place in children's literature, solidifies into a comprehensive examination of the issue in texts across genres, periods and nations, and ends with an epilogue written by Phillip Pullman, who stands in an authoritative position to give his inside understanding of its working. The collection accomplishes its mission of revealing the metaphoric trope of childhood as space.

**EET/TEE KEYWORDS:** Space; Place; Children's literature; Book Review.

The collection *Space and Place in Children's Literature, 1789 to the Present*<sup>1</sup> reflects the latest results in the research of space and place in children's literature. It follows the path cleared by Terri Doughty, Dawn Thompson, Jane Carroll, and Pauline Dewan. The volume is divided into four sections. The first section is on the general and theoretical nature of space and place in children's literature, and the second and the third section respectively deal with real world space and imaginary space. In the last section, the discussion of children's literature comes a full round and examines the book as a material object with space

<sup>1</sup> M. Sachiko Cecire, H. Field, Kavita Mudan (edd.), *Space and Place in Children's Literature, 1789 to the Present*, Finn, Ashgate (Ashgate Studies in Childhood, 1700 to the Present), 2015, p. 250.

potentials, focusing on the material text, space sequence, paratextual elements and metatext.

Given the collection's diversity in periods, genres, and nations, the introduction is especially helpful for the reader to understand the central issue of space and place in its proper theoretical framework, as well as the organization of the volume. It begins by pointing out the unique and vital importance of space in children's literature that it «provides an alternative to the authoritative knowledge of the adult-dominated world» (p. 1). It then goes on to explain the origin of the volume's title, which comes from a monograph by Yi-Fu Tuan on space and place. It points out the underlying idea and premise of the volume that «childhood is figured as a metaphorical space» which can be revisited (p. 2). It then proceeds to introduce the four sections of the book, ending with Pullman's epilogue. The editors may have too strong an interest in Pullman that the digression on the association of Oxford and Alice (in wonderland) and the consequent Alice Day takes up more than one third of the space in the introduction, which is not without much fun in reading. After this lengthy discussion, the due routine introduction of the chapters comes into the reader's view.

Peter Hunt's *Unstable Metaphors: Symbolic Spaces and Specific Places* provides an introductory guiding theoretical framework for the whole volume. It begins by drawing attention to the central critical concern of the (im)balance in the power relationship between the adult writer and the child reader, which, according to Hunt, can be analyzed from the tropes of space and place. Inner space is the imaginary space created in the book, which is by nature fictional, but is quintessentially «real», whereas outer place, though referring to real locales in the world, are «intellectually slippery» (p. 24). Hunt points out that the treatment of space and place in children's literature has changed drastically in the twentieth century, and explains in detail those changes in some representative works. The *Secret Garden* and *Treasure Island* are similar in this respect in that inner space has vital importance and is closely connected with the psychological states of the characters whereas their real world geographical references are hard to locate. *Alice in Wonderland* seems to be a book totally about enclosed imaginary space, but it is heavily coded with reference to Oxford, which Alice and Carroll shared. As Hunt points out in his concluding paragraph, the investigations into space and place in children's literature sheds insights into the changing definition of good children's literature, which is always a negotiation and balance between the adult writer and the child reader (p. 23). Following Hunt's beginning chapter, Aneesh Barai's *Speaking the Space between Mother and Child: Sylvia Plath, Julia Kristeva, and the Place of Children's Literature* somehow falls short of expectation. While Peter Hunt's chapter writes of the issue of space and place in general, Barai's chapter is focused on the space in Sylvia Plath's works. Despite of her detailed analysis of Plath's works and an excellent knowledge of Kristeva's theory, Barai's point is self evident: to

demonstrate that Kristeva's theory of the «semiotic» is not suitable for the analysis of Plath's works. Barai's reading could have been directed to a better, more suitable and specific conclusion other than the commonly acknowledged critical precaution that theories do not fit texts so perfectly and always require constant challenges, modifications and reevaluations.

The second section «Real-World Spaces» begins with Francesca Orestano's *The Neapolitan Gouache of a Strong-Minded English Lady: 'The Little Merchants' by Maria Edgeworth*, which explores the significance of Italian setting in *The Little Merchants*. Orestano distinguishes two elements in the fiction: moral contrast and guidebook, and sets out to analyze the sources of the places described in the book. She detects that underneath the surface of the exotic Neapolitan setting, all the human economic activities, including the market, the selling, and the farm, are local, entirely belonging to the British. Thus Maria Edgeworth's fiction, while educating the young readers of geography, history, archeology, geology and connoisseurship through its picturesque description, is «loaded with distinctly English economic notions and meaning» (p. 72). Orestano's cultural geographical analysis investigates the spatiality of identity that Maria Edgeworth constructed for her child readers and decomposes the multiple cultural components in her didactic work for British children. Renata Morresi's *Borders, Pachangas, and Chicano/a Children's Picture Books* brings us from Italy to the US and, in the context of the linguistic situation in the US that Spanish is the largest foreign language with a 44 million Hispanic population, among which 10 million do not speak Spanish, deals with a number of Chicano/a children's picture books from the perspective of (re)organization and negotiation of blurred space between US and Mexico. After an introduction to the historic and current Hispanic immigration from Mexico to the US and the current bilingual curriculum program, she delves into multiple Chicano/a literature and delineates the two different cultures and their intermingling, blurring and assimilation. Before the 1960s, Chicano children did not identify with the culture and values in popular American children's literature and were also ignored by the latter. The stereotype of Chicano children survives today, but is being modified and changed by those children's books that «promote integration and academic achievement and at the same time cherish and respect cultural memories and traditions» (p. 91). Elzette Steenkamp's chapter *Sinister Ecology: Space, Environmental Justice, and Belonging in Jenny Robson's 'Savannah 2116 AD'* concerns itself with children in a particular space-wildlife reserve in South Africa. The current (European) stereotype of African children are often carefree, barefooted, and in harmony with exotic wild animals, while Robson's *Savannah 2116 AD*, according to Steenkamp, problemizes this notion and points out that it is exactly because of European colonial oppression, exploitation and apartheid, together with the current global conservatism, that Africans' attitude towards nature and wild animals becomes complicated, intensified, and conflicted, which results in «a deep-rooted resentment towards

any environmental system which appears to deem wildlife more important than certain people» (p. 103). Steenkamp situates Robson's irony in the reality that a group of South Africans today live in squalor and concentrated space, fenced away from the Kruger National Park, which is exaggerated and ironized in the novel in the form of a continental-scale herding of ordinary citizens into reserves for the sake of replenishing wild animals, which live freely on the African continent. The chapter interrogates the prejudice and the underlying attitude underneath the popular and somewhat tyrannical trend of conservatism in the context of European colonialism legacy and apartheid, and exposes a much more complicated relationship of South Africans with wild animals and nature.

Part III «Traversing the Imaginary» explores spaces envisioned in children's literature and their interaction with real world counterparts. Maria Sachiko Cecire's *English Exploration and Textual Travel in 'The Voyage of the Dawn Treader'* traces C.S. Lewis' fiction's source to Richard Harkluyt's *Mandeville's Travels*, and discusses how Lewis created new imaginary spaces in the light of Henry Jenkin's textual poaching theory. Lewis «poached» Harkluyt's text, which is full of medievalism and classical images, and envisioned a new space in which a new British exploration and domination is possible at the hands of child readers. The resemblance of Narnia in the fictional map to Britain's geographical location and historic image is a subtle reminder of the glorious past of the British Empire, which just lost its ruling in India five years before the publication of the novel. Thus a spatial connection between imaginary lands and real world national identity is established, which helps to maintain the national imaginary community identity. Cecire's chapter powerfully compares Lewis's novel with its source, overcomes the complicated relationship between the texts, insightfully connects Lewis writing purpose with contemporary British political context, and delineates the writer's cultural and social commitment. Ruth Feingold's *Mapping the Interior: Place, Self, and Nation in the 'Dreamhunter Duet'* applies postcolonial perspective to Elizabeth Knox's famous novels with a focus on the relationship between the protagonist Laura Hame and the Place – an imaginary zone in Southland. As the chapter makes clear, place often has a centrality in children's literature: it is often used as a metaphor for the development of the self. Seeing in this way, Laura's knowing, naming, and claiming the Place is a manifestation of the growth of her selfhood. The fact that she finds herself increasingly at home in the Place reveals that she is overcoming disorientation and alienation and is discovering and understanding her coming of age, which has multiple meanings at different levels. When she is making her quest for her connection with the Place, she is also maturing as an individual and as a citizen. The chapter also analyzes the implications of maps – a common device representing colonizing exploitation. The map is a commercial commodity for sale and essential for commercial dreamhunting. It represents the nation's effort to control the Place, which is doomed to be in vain. The Place resists linguistic representation, just



as dreamhunters' relationship with rangers (who are hired by the nation to guard the Place). Margot Stafford's *Journeys through Bookland's Imaginative Geography: Pleasure, Pedagogy, and the Child Reader* selects a book series published in 1909 by Bellows-Reeve company and links the imaginary space of the Bookland with the assumption and aspiration of childhood reading at the beginning of twentieth-century US. The books were significantly influenced by the theories of two prominent American professors at the time: G. Stanley Hall and Brander Matthews. Hall's advocate of a progressive human civilization process influenced the editor Charles H. Sylvester to organize the series according to the different stages of development of children in a way similar to the evolution of human civilization. It became the underlying organizing rule for the materials in the books. Therefore the Bookland, with its many materials waiting to be read, was constructed as an imaginary space/land to be explored by child readers. The second assumption was that childhood reading needed adult supervision and guidance. Books were believed to have positive influence on the development of children's moral, spiritual and career development, calling for a commitment that children read good books and are taught how to read them. This assumption led to the encyclopedic nature of the book set and its rich paratextual editorial guidance in the form of introductions, footnotes, and questions. The third assumption came from Brander Matthews, who saw American literature in the larger English literature tradition while at the same time rising prominently and independently. By comparing Sylvester's attitude and that of the publisher James Keddie, who revealed his understanding of the series in a memoir, Stafford argues that the assumption about childhood reading changed in the 1930s from a previously more spontaneous reading to one that was in a created and controlled environment.

The fourth part «Book Space» centers on the materiality of books in relation to space. As a material object, the book's space is mingled with the narrative and pictures inside the book. Hannah Field's *The Story Unfolds: Intertwined Space and Time in the Victorian Children's Panorama* discusses a particular type of Victorian children's books-the panorama, which is unique in the spatial simultaneity of the format. She groups a host of Victorian panoramas in accordance to their sequential and narrative claim, and reveals that the simultaneous juxtaposition of pictures undermines the conventional way of readers to read from left to right, and argues that panoramas instruct and encourage child readers to develop their understanding of connections and events. The panorama is situated in the Victorian social background of rapid change and lack of unification, which is visible at the level of textual structure that seeks to embrace or transcend shapelessness. Field also finds out that children's panoramas «structure reality in a way that takes its cue from the intersection of horizontal space and panel divisions or pagination» (p. 176). Catherine Renaud's *The Child's Imaginary World: The Spaces of Claude Ponti's Picture Books* is an excellent study of space in Claude Ponti's picture books.

Renaud analyzes paratextual elements and metafictional texts in the books and discusses how these narrative devices create a sense of spatial cohesion for the reader. As Renaud notes, the metafictional details of books within another layer of books bring out the reader's awareness of the book as an object as well as the intertextuality of books. The baby chicks' attack on the barcode in the back cover as well as their commentary around frames of the main pictures effectively expands the spatial potential of picture books and challenges readers' assumption of the proper story space inside a book. In addition to metafictional space and paratextual space, Renaud also analyzes theatrical space and mental space. Theatrical space enables the reader to use the toy as a distancing *mise en abyme* of herself and to increase self knowledge, and mental space is a complex inner-space of the mind, which is manifested in the moving house, the flying-away background to the story, and the selection of portrait/landscape format for the picture books. Map, which has been discussed in other chapters, is also employed by Ponti to help readers to concretize the imaginary world while anchoring it via spatial distribution. In conclusion, Renaud argues that Ponti has made use of a number of devices to blur the boundary between reality and fantasy to create space at different levels of the text for child readers to develop an interesting and illuminating way of understanding space.

After the previous chapters have exhausted all the possibilities of space-imaginary, real world, and the book itself, Philip Pullman's epilogue *Inside, Outside, Elsewhere* serves as a wonderful conclusion to the collection from a quite different perspective as a famous child writer. *Borderland*, which Pullman uses synonymously with «elsewhere», bridges the space between the private mind of the reader and the space in the book. Pullman lists a host of pictures representing what reading should look like, and the different kinds of environment setting created by illustrators of varying talents and tastes. He also shows illustrations from his own works and reveals how some illustrations came into their present shape. The last example, but maybe the most significant, is a picture from the computing results of a Microsoft research team on visualizing texts. The technique tries to spatialize simultaneously the sequence of words in a text, which can be roughly categorized as corpus linguistics and natural language processing, two areas of research that are developing fast in recent years. Despite the onesided enthusiasm and the progress that digital humanities make in recent years, Pullman, as one of the most famous author of the day, insightfully points out that what authors consider in writing are sound, rhythm, taste, texture, as well as meaning, whereas corpus linguistics and similar researches so far can only process meaning, a gap that may take a long time to fill.

Space and time are fundamental dimensional framework for human thinking and are therefore important elements in literature. Space plays a subtler role and often serves as the basic structuring principle that gives the work a distinctive atmosphere and flavor, while place is the specification and spatialization of

space, concretizing space and attaching readers' emotions to specific locales. *Space and Place in Children's Literature, 1789 to the Present* effectively explores the structuring function of space and the emotion-bonding function of place through convincing readings of a wide range of children's literature across genres, periods and cultures. Its academic achievements are that the collection deals with the subtle but arching presence of space in different texts and brings the intangible concept within critical grasp in a well-organized way, and that it dismantles the complex relationship between places and characters. If there are some drawbacks to the collection, it is that some individual chapters haven't realized their potentials of digging still deeper in their textual analyses and arguments, and that as a whole, the collection has not done enough innovative work in theoretical exploration into the topic of space and time. But what it lacks in depth and theory is well compensated by the range of its exploration, which serves as an excellent start to push the research of space and time in children's literature into more possibilities. In this sense, the book deserves warm recommendation for those who are interested in the basic structuring role of space in literature and for those who look for the intimate relationship between characters and place.



# O Mural do Tempo: Manuais Escolares em Portugal

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## *The wall of the time: textbooks in Portugal*

**ABSTRACT:** Starting from the recent publication of Justino Magalhães, *O mural do tempo: manuais escolares em Portugal*, the present paper intends to initiate a reflection on the importance of textbooks during the centuries in the Portuguese school system well as on the role of textbooks in the formation of the collective mentality.

**EET/TEE KEYWORDS:** Textbooks; History of Education; Historiography; Portugal; XIX-XXI Centuries.

Há pelo menos dois séculos os manuais assumem um importante papel no mercado editorial e na formação das mentalidades coletivas. Apesar disso, só a partir da década de 1960 e, sobretudo, já nos anos 1980, foi observado um interesse crescente pela história dos livros e das edições escolares em diferentes países, como Estados Unidos, Alemanha, Japão e França<sup>1</sup>. Em Portugal, Justino Magalhães tem desenvolvido estudos referenciais sobre cultura escrita, sistemas escolares e instituições educativas, no centro dos quais ele situa o livro escolar.

Professor catedrático da Faculdade de Psicologia e de Ciências da Educação da Universidade de Lisboa, Justino Magalhães é pesquisador da história da educação portuguesa, na linha de cultura escrita e modernidade educativa. Graduou-se em História, pela Universidade do Porto, e doutorou-se em Educação, pela Universidade de Minho. Realizou quatro pós-doutorados, os

<sup>1</sup> A. Choppin, *Prefácio*, in C. Bittencourt, *Livro didático e saber escolar (1810-1910)*, Belo Horizonte, Autêntica, 2008, pp. 9-12.

dois últimos na Universidade de Cambridge, no Reino Unido, e na École des Hautes Études en Sciences Sociales, na França. Já publicou vinte e quatro livros, mais de quarenta capítulos em livros, além de dezenas de artigos e trabalhos em eventos científicos. *O mural do tempo* é a sua penúltima obra, publicada em novembro de 2011, pela Edições Colibri e pelo Instituto de Educação da Universidade de Lisboa<sup>2</sup>.

O livro é estruturado em duas partes: a primeira, *O livro escolar na base da cultura escolar*, tem dois capítulos: *História do manual escolar* e *Livro escolar e razão educativa*. A segunda, *Manuais escolares em Portugal (sécs. XVI-XX)*, com três capítulos: *Manuais do ensino primário elementar e complementar*, *Uma biblioteconomia em expansão* e *O livro escolar no centro da convenção educativa*. O livro se inicia com um pequeno texto intitulado *O mural do tempo*, no qual o autor apresenta sua proposta e algumas premissas de análise.

Para finalizar a obra, retoma sua tese e principais argumentos no texto *Memória do futuro*: conservar, regimentar, prevenir. Trata-se de um ensaio cuja origem foi a análise da regulamentação do livro escolar. Nele, o autor parte da seguinte questão: «como o sistema punitivo da censura aos materiais impressos evoluiu para um sistema preventivo e de vigilância desde a produção até a circulação e ao uso?» (p. 264). Sua conclusão deu origem à tese de que disciplinar e censurar o livro escolar significou a normalização da leitura, a sistematização do conhecimento e a disciplinarização do pensamento, enquanto meios reguladores da sociedade. Isto se comprovaria pelo conjunto e pela hierarquia de órgãos e regulamentos que estruturaram os campos da autoria, edição, circulação e utilização dos livros escolares em Portugal, a partir de meados do século 19.

Nesse intuito, Magalhães apresenta um inventário de livros escolares publicados e adotados no ensino primário – elementar e complementar – português, do século 16 até início da década de 1970. São 1,043 títulos organizados em duas categorias: os livros escolares integrados, ou manuais escolares, e os livros escolares em sentido amplo, dispostos por matéria. Praticamente toda a segunda parte da obra é dedicada ao arrolamento deste conjunto de livros, comentado e comparado em suas categorias. Também se expõe e se analisa as listagens de manuais aprovados e adotados, publicadas entre 1882 e 1910.

<sup>2</sup> J. Magalhães, *O mural do tempo: manuais escolares em Portugal*, Lisboa, Colibri - Instituto de Educação da Universidade de Lisboa, 2011.

A escolha metodológica foi a da abordagem serial<sup>3</sup>. Em trabalho anterior<sup>4</sup>, o autor afirmou a legitimidade da abordagem específica da seriação no tratamento desse tipo material didático por meio da qual se faria emergir o que ele chamou de uma «etnohistoriografia do manual escolar» (p. 36). Aliás, a consideração do caráter complementar entre a história dele e a história do livro, em geral, justificaria esta escolha: principal suporte da cultura escolar, os manuais escolares constituem um caso particular no quadro mais amplo da cultura escrita.

Justino aponta que o reconhecimento da especificidade do manual escolar em relação ao livro originou um campo científico, a chamada manualística. Ela se ocupa do inventário de suas diversas tipologias, da recomposição de sua gênese e da evolução em sua configuração e semântica, peculiar aos estudos de seriação, e da hermenêutica das práticas pedagógicas, didáticas e culturais subjacente ao livro escolar. Empenha-se, ainda, em reconstituir seus circuitos e mecanismos de circulação e as formas de utilização, tomando o livro escolar como fonte histórica que consagra uma ordem de leitura.

Mesmo constituindo um objeto epistêmico e o centro de um campo particular, os manuais têm sido cada vez mais utilizados no *corpus* documental de pesquisas a respeito dos métodos e práticas escolares, como evidenciado no caso da produção em torno da história das disciplinas escolares. Ainda que a história do livro escolar não seja confundida com a sua utilização como fonte historiográfica, o autor informa, em outro trabalho, que essas investigações têm se cruzado<sup>5</sup>. Sobre isso, ele inclui uma breve, mas importante observação: mesmo portador de normalização didático-pedagógica e de regulação política, o manual permanece sendo foco de estudos que privilegiam seus estatutos ideológicos.

No Brasil, até o início da década de 1990, grande parte dos trabalhos acadêmicos que tematizavam o livro escolar tendia a abordá-lo a partir da denúncia de seu caráter ideológico, como mencionaram Munakata e Bittencourt<sup>6</sup>. Análises mais circunstanciadas só foram impulsionadas com a

<sup>3</sup> Justino faz referência aos trabalhos desenvolvidos por Alain Choppin na França, a partir da Rede Emanuelle, assim como o de Anne-Marie Chartier, e do espanhol Augustín Escolano Benito. Na América hispânica destaca a atuação da Rede Manes. No caso brasileiro, o autor cita o banco de dados de livros escolares do programa Livres, do Centro de Memória da Faculdade de Educação da Universidade de São Paulo, o projeto Memória de Leitura, ligado ao Instituto de Estudos da Linguagem da Universidade Estadual de Campinas, e o *Livro didático e saber escolar 1810-1910*, de Circe Bittencourt, publicado pela Editora Autêntica em 2008. Fornece, ainda, os endereços eletrônicos das bases e catálogos sobre manuais escolares destas e de outras iniciativas dentro do campo.

<sup>4</sup> J. Magalhães, *O manual escolar no quadro da história cultural: para uma historiografia do manual escolar em Portugal*, «Sísifo. Revista de Ciências da Educação», n. 1, 2006, pp. 5-14.

<sup>5</sup> J. Magalhães, *O manual escolar como fonte historiográfica*, in J.V. Costa, M. Felgueiras, L.G. Correia (coord.), *Manuais escolares da biblioteca pública municipal do Porto*, Porto, Faculdade de Psicologia e Ciências da Educação- Faculdade de Letras, 2008, pp. 11-15.

<sup>6</sup> Segundo Munakata, esse tipo de abordagem caracterizou o livro escolar como «um simples

entrada de discussões em torno do currículo, das disciplinas escolares, da cultura escolar, da história cultural, da história do livro e da leitura, referenciadas em Andre Chervel, Alain Choppin, Yvor Goodson e Roger Chartier<sup>7</sup>.

Justino Magalhães articula o manual no processo de composição do saber escolar:

Como transformação dos conteúdos, teorias e conceitos de uma matriz científica pura e ampla em matéria escolar, os manuais representam, sobretudo, uma adaptação científica, cognitiva e curricular, incorporada em distintos registros materiais e textuais, e são também uma forma de acesso às práticas de ler e dar a ler, pelo que constituem um contributo fundamental, senão único, para a história cultural. No interior da cultura escolar e da cultura escrita, a história do manual permite uma aproximação à ordem do conhecimento e às práticas pedagógicas, bem como a projecção e a inferência de distintas formas de aculturação e sociabilidade (p. 20).

É possível questionar a maneira pela qual esta definição do lugar do manual escolar no processo de composição das disciplinas escolares se relaciona com a tese clássica de Chervel<sup>8</sup>, no que diz respeito à autonomia desse gênero de saber em relação às chamadas ciências de referência. De todo modo, o que Justino deixa evidente é que investigar a história do livro escolar passa por indagar a sua gênese, sua natureza, suas simbolizações e significações mais profundas com relação ao saber e ao conhecimento: a abordagem serial na longa duração visa a perscrutar a origem e a evolução dessa relação entre saber e conhecimento.

Segundo o autor, o estudo da regulação sobre o livro escolar ressalta os diferentes aspectos da racionalidade educativa subjacente e determinada por ele, visto que em todas as fases de sua materialidade, configuração e uso esteve presente um quadro educativo. Integrado na cultura escrita, o livro escolar incorporou uma orientação ideológica e comportou uma pragmática voltada para o progresso e construção do coletivo nacional que se tornou objeto de regulamentação, controle e censura em diversos âmbitos, como o cultural, o curricular e o didático-pedagógico.

conjunto de ideias e valores que deveriam ser condenados (ou aprovados) segundo uma certa ortodoxia» (p. 183). Vide K. Munakata, *O livro didático: alguns temas de pesquisa*, «Revista Brasileira de História da Educação», vol. 12, n. 3, 2012, pp. 179-197. Em outro trabalho recente, Bittencourt destaca que isso foi uma «tendência nas demais áreas da educação, inspiradas nas concepções de Althusser e Establet sobre o papel da escola no mundo capitalista» (C. Bittencourt, *Produção didática de história: trajetórias de pesquisa*, «Revista de História», n. 164, 2011, pp. 487-516).

<sup>7</sup> Um trabalho pioneiro no Brasil, que Munakata utiliza como referência desta renovação temática e histo-riográfica no campo da História da Educação, foi a tese de doutorado de Circe Bittencourt: C. Bittencourt, *Livro didático e conhecimento histórico: uma história do saber escolar*, Tese (doutorado em História Social), Faculdade de Filosofia, Letras e Ciências Humanas, Universidade de São Paulo, São Paulo, USP, 1993.

<sup>8</sup> A. Chervel, *História das disciplinas escolares: reflexões sobre um campo de pesquisa*, «Teoria & Educação», n. 2, 1990, pp. 177-229.



O ideal de nação esclarecida, ordeira e hierárquica – que a partir do século 18 dirigiu o Estado no controle pela ordem moral, cívica e ética – orientou uma ação pedagógica baseada na censura prévia, preventiva, e posterior, ostensiva. O autor salienta que além dos normativos gerais em torno da circulação de ideias e dos domínios autoral e editorial, foram criados órgãos de fiscalização e, ao mesmo tempo, constituídos mecanismos e sistemas de controle e de punição. O manual escolar esteve sujeito não apenas aos condicionamentos de qualquer texto escrito, mas a preceitos especificamente escolares: seja pela definição prévia dos planos de estudo e das matérias a incluir em cada segmento de ensino e em cada disciplina, geralmente acompanhado de orientações metodológicas, seja pela promoção de concursos e produção de listagens de livros recomendados ou simplesmente autorizados ou excluídos.

Do estudo desta regulamentação e das listas de livros aprovados e adotados na virada do século 19 para o 20, Justino concluiu que o campo do livro escolar, isto é, de todos os materiais impressos não necessariamente elaborados para o espaço escolar mas assim empregados, foi muito mais amplo que o do compêndio e do manual. A normalização pedagógica e didática e a organização do currículo em uma hierarquia de ciclos escolares, conferiu mais consistência ao manual, incluindo a sua nacionalização fortalecida pela uniformização do livro. Ainda assim, manteve-se a tradição da diversidade bibliográfica e, em virtude da massificação escolar, as políticas relativas ao livro e à leitura sofreram mudanças.

Houve uma crescente preocupação com o rigor textual, nos aspectos de conteúdo e forma, bem como uma intensificação do livro enquanto suporte do texto escrito e da razão escolar. Ele também cumpriu a função de testemunho e memória sobre as matérias e os conhecimentos programados e ensinados, bem como se conformou em uma ferramenta de consulta para além da sala de aula. As bibliotecas escolares surgiram como destino para os compêndios e impressos afins, servindo à comprovação pedagógica e à exemplificação e normalização didática.

Para Justino, o livro estruturou o pensamento pedagógico, a ação didática, o conceito de escola, o método de transmissão e a apropriação do conhecimento. Essa aproximação entre o mundo do livro e o mundo escolar balizou e intensificou a prevenção, a advertência e a negociação entre as diversas partes envolvidas. Assim, autores, editores e leitores permaneciam previamente informados sobre a natureza dos objetos culturais, ideológicos e educacionais legitimados e autorizados, da mesma maneira que conheciam os campos de liberdade e os níveis e mecanismos de punição. Por outro lado, censores e avaliadores também tendiam a justificar suas decisões de modo a prevenir reclamações, mas igualmente a incorporar uma função pedagógica a seus pareceres.

Dessa forma, a censura deu lugar a um regime de educabilidade, visto que o objeto cultural era investido de uma função educativa desde sua produção, como em sua recepção. A generalização e formalização desse processo implicaram que

as matérias culturais se transformassem em currículos. Justino ainda aponta que, na medida em que foram correspondendo às necessidades, às prerrogativas e às circunstâncias históricas da cultura escolar e da pedagogia em geral, os diversos ramos do saber se estruturaram em disciplinas curriculares e a mesma operação envolveu o livro escolar.

Censurar e regularizar o livro, da configuração até a demarcação de matérias, passando pela orientação ideológica e as formas de uso e de acesso era, para o autor, assegurar uma normalização escolar e, conseqüentemente, prevenir e disciplinar os leitores. Em última instância, regular a sociedade. A liberdade de interpretação não é admitida, *a priori* e *a posteriori*, para o livro escolar. Suas variações de leitura são entendidas como incapacidade ou condicionalismo do leitor, ou ainda como atos perversos e ideológicos. É exatamente nesse aspecto que o manual escolar se distingue de outros livros, visto que apresenta orientações e ingerências explícitas em relação ao comportamento do leitor, instaurando uma ordem de leitura.

Finalmente, sendo memória da ação e da cultura escolar, o manual foi um instrumento do porvir. Comportou em si uma memória do futuro, prevenindo-o e normatizando-o, visto que foi um fomentador e organizador da mudança. As comissões de promoção de concursos, de aprovação e mesmo as comissões escolares de seleção desses livros agiam por antecipação. O livro foi adotado a partir do princípio de um amanhã desejado e projetado. Ele acolheu e deu forma a um ideário educativo; «reificou, deu configuração, ordem e significado à cultura escolar e fez da escolarização o caminho do futuro» (p. 265).

# The revolution in school or a school in revolution. About a recent essay

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**ABSTRACT:** Starting from the recent publication of Joaquim Pintassilgo, *O 25 de Abril e a Educação. Discursos, práticas e memórias docentes*, this paper intends to initiate a reflection on the importance of the date of April 25, 1974, in which there was in Portugal the glorious military revolution, that culminated in the fall of regime established by Antonio de Oliveira Salazar. Which was the role of this revolution inside the Portuguese school system? Which was the influence of the school in the Portuguese revolution?

**EET/TEE KEYWORDS:** History of Education; School system; Revolution; Historiography; Portugal; XX Century.

The Portuguese do not usually celebrate with great enthusiasm historical ephemerides. The publishing industry has, however, sought to reverse this trend, skilfully taking advantage of strong historical moments to boost its activity.

The commemorations of the centenary of the Portuguese First Republic (1910-1926) are paradigmatic in this regard, allowing the publication of a multitude of studies and the reissue of others that were inaccessible in the commercial channels long ago.

This year's celebration of the 40<sup>th</sup> anniversary of the 25 April 25<sup>1</sup> revolution led to a similar phenomenon yet impossible to be compared in quantitative and

<sup>1</sup> On 25 April 1974 a coup d'état, brought about by a strictly military movement of middle-ranking officers, overturns the long lasting Portuguese dictatorship (1926-1974) in less than 24 hours. Contrary to what normally happens on such occasions, the military presented a political programme that led to a dramatic rupture with the former regime and the beginning of the process of decolonization and democratization. Nevertheless, the downfall of the dictatorship did not provide for the immediate advent of democracy: the coup d'état led Portugal into a long revolutionary

qualitative terms. Despite having witnessed some editorial dynamism on the subject, it is difficult to draw a parallel with what happened in 2010. Clearly, the weight of a centenary supplants, with great ease, a celebration of just four decades. Nevertheless, to what extent does not this editorial warmth reflect the fact that this remains a divisive topic in Portuguese society? Fortunately, the relative editorial doldrums we detected is broken with works as the one edited by Joaquim Pintassilgo, *O 25 de Abril e a Educação. Discursos, práticas e memórias docentes* [*The 25<sup>th</sup> of April and Education. Speeches, practices and teachers' memories*]<sup>2</sup>, published by Colibri editions in October 2015.

Joaquim Pintassilgo is a well-known author in academic circles, not only for his activity within the Institute of Education, University of Lisbon, but also for the extensive work carried out in the field of History of Education<sup>3</sup>. Featuring a broad experience in edited volumes, in this book J. Pintassilgo offers us a set of nine texts that seek to portray and reflect on the continuities and especially the disruptions operated in the educational field during the years of the On-Going Revolutionary Process<sup>4</sup>. To this end, he convened a group of home and foreign scholars – António Gomes Ferreira, Fátima Chorão Sanches, Lia Faria, Libania Xavier, Luís Mota, Luísa Tiago de Oliveira, Maria João Mogarro, Raquel Pereira Henriques e Rosa Serradas Duarte – who have privileged this area of research.

Highlighting the idea that education is done «over the long term, but it is the short term that makes it meaningful», Sampaio da Nóvoa masterfully condenses the spirit of the book. As author of the preface, he remarks that through this book one can get to know the «‘opportunities’ which were opened in April», gathering ‘teachers’ voices, records and memories, utopias and disappointments, bringing back the richness of the years that forever changed the country and our lives» (Nóvoa, p. 7). A brilliant text, even though brief, which in our view did not excuse the editor of a presentation note.

The pointed out flaw does not deprive the work under review of any merit or interest. In our view, this is a must-read book for historians and social scientists but also for all who are interested in our more recent past and in

process of almost two years that was to culminate in the approval of a new constitution in April 1976 and in the instauration of a Western style pluralist democracy. For an overview of the period (in Italian) see M.I. Rezola, *Il Movimento delle forze armate e la transizione verso la democrazia*, «Storia e problemi contemporanei», vol. 54, n. 2, 2010, pp. 55-72.

<sup>2</sup> J. Pintassilgo (ed.), *O 25 de Abril e a Educação. Discursos, práticas e memórias docentes* [*The 25<sup>th</sup> of April and Education. Speeches, practices and teachers' memories*], Lisboa, Edições Colibri, 2014.

<sup>3</sup> Ph.D. in History by the University of Salamanca (1996), Pintassilgo is author, co-author or organizer of several books, especially in the field of History of Education. For further information see <<http://orcid.org/0000-0001-7685-7367>> (last accessed: March 14<sup>th</sup>, 2015).

<sup>4</sup> On-Going Revolutionary Process [*Processo Revolucionário em Curso* – PREC] is the acronym often used to designate the period of the history of Portugal from 25 April 1974 coup to the establishment of a new constitution in April 1976.

social reflection. A book that immediately leads us to the idea enunciated by José Medeiros Ferreira, in one of his most influential works – *Portugal Entranced* –, that «the date 25 April 1974» marks «the twentieth century and divides society into a before and after»<sup>5</sup>.

Although some of the authors in this collection remember the changes carried out in the last years under Marcelo Caetano's government<sup>6</sup> – in particular under the so-called Veiga Simão Reform (Henriques, pp. 187-207) or even within community teachers' groups (Duarte, pp. 71-89) –, the fact is that the carnation revolution represented a moment of rupture in education. One of the key ideas behind this book is that this was one of the most dynamic sectors during the period, witnessing large demonstrations and transformations.

Teachers training is one of the most pressing policy areas. Huge changes are undertaken in Initial Teacher Training Schools. They result not only in the end of the State Exam and the «compulsory oath» of allegiance to the constitutional text (act which thus represented the rite of institution of the civil servant under the dictatorship), but also in the extension of training time and training offer. Curricula and programs are redesigned *in view* of their modernization and adaptation to progressive and advanced pedagogies, better aligned with the country's political moment (Mogarro; Mota & Ferreira). These are revolutionary ferment times in the schools that until April 25 were considered as one of the most typical institutions of the Portuguese dictatorship.

This edited volume also depicts some of the most characteristic initiatives of the period such as the brief and troubled experience of the Student Civic Service (Oliveira) or the implementation of contact activities within the curricula of Primary Magisterium Schools (Mota & Ferreira). It also recalls the fact that, in 1974, more than half of primary and secondary school teachers were not professionalized, and the role of the trade unions in the building of the new Education System and the «new teaching profession» (Duarte).

Changes also affect school management (with the introduction of democratic management of schools giving decision-making power to the general school assemblies, teachers and students – Sanches, pp. 29-70), and the redefinition of the teacher's role. The teacher is now perceived as a «cultural facilitator» (Pintassilgo); a transformer intellectual having in school his intervention territory (Sanches); a committed intellectual whose action transcends the school walls (Oliveira, Sanches, Mota & Ferreira); a militant struggling to build a socialist society, *a* project which dominates national political life after the 11 March 1975 events<sup>7</sup>. Teachers and educators radically rework their speech (Pintassilgo) and an «experience of utopia» enters the School.

<sup>5</sup> J. Medeiros Ferreira, *Portugal em Transe*, in J. Mattoso (ed.), *História de Portugal*, 8 vols., Lisboa, Círculo de Leitores/Estampa, 1993, vol. 8, p. 11.

<sup>6</sup> Marcelo Caetano was the last prime minister of the Portuguese dictatorship (Estado Novo), from 1968 until his overthrow in the 25 April 1974 coup.

<sup>7</sup> Right-wing *coup d'état* lead by former President of the Republic António de Spínola. Its

In this comprehensive picture of what was April's school the idea that the transformations were part of a broader social movement of reaction to the dictatorship stands out. A multiform and spontaneous movement (Sanches, p. 29), that finds a window of opportunity in the state fragility and crisis. It should however be noted that despite the revolutionary impetus, there were «classes where the Carnation Revolution barely penetrated» and «others in which it had already entered long before 1974». This is because «innovation processes are not instituted by decree, they must be appropriated by each one» (Henriques, p. 205). In addition—the changes that operated in education, as in other areas, during the revolutionary period were not peaceful, resulting in contradictory readings ranging from praise to the «brave new world» to the criticism of the «chaos created in schools» (Sanches).

This book also stands out for the strength of the presented thesis, arising not only from the reflection developed by the authors but also from the caution in their reasoning. One of the most common characteristics to all articles is the large use of bibliography, «*printing media*» and other sources (primary and secondary), without neglecting the use of oral history (Mota y Ferreira; Xavier; Faria; Henriques). Take the last chapter of the book as an example. Following previous work carried out within «life history» research field<sup>8</sup>, its author uses testimonies to analyse «physical work spaces, some operating rules, relationships between the various educational actors, appropriation of any pedagogical innovations in a particular historical juncture – just before and just after 25 April 1974» (Henriques, p. 188). This is an innovative approach that allows us to have a more complete, comprehensive and humane picture of the revolution in schools and of the school's revolution. Similarly, Libania Xavier explores a full of potential domain, such as the use of testimonials to study a profession. Further, she has the merit of bringing a comparative dimension to this book by paralleling Brazilian and Portuguese teachers' career patterns.

According to Mota & Ferreira, the «period of the teaching experiences proved too short to allow any consolidation or to draw any meaningful conclusions» (p. 145). Although this is a book about the Carnation Revolution, some authors also approached the subsequent democratic consolidation period, in an attempt to analyse the evolution of the processes triggered in 1974-1975. Interestingly, Mário Sottomayor Cardia<sup>9</sup> is invariably presented as the «executioner» of April's school, because in fact, and regardless of

failure allows the progressive sectors to gain more power in the state and military structures, speeding up the revolutionary process. An example of this is the nationalization of the Banks and Insurance companies.

<sup>8</sup> M.A. Samara, R. Pereira Henriques, *Viver e Resistir no tempo de Salazar*, Lisboa, Verso de Kapa, 2013.

<sup>9</sup> Mário Augusto Sottomayor Leal Cardia (1941-2006), journalist, university professor and Portuguese politician, was Minister of Education and Scientific Investigations of the First Constitutional Government (1976-1978).

the historical assessment presented on the revolution's impact in Education, ultimately the idea that prevails is that this was a time of utopias, as advocated by the then Minister of Education of the first constitutional government.





# Pastoralità ed educazione. A proposito di una recente ricerca sull'episcopato veronese di Agostino Valier (1565-1606)

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*Pastorality and education. About a recent research on episcopacy in Verona of Agostino Valier (1565-1606)*

**ABSTRACT:** This paper focuses on the recent book of Elisabetta Patrizi entitled *Pastoralità ed educazione. L'episcopato di Agostino Valier nella Verona post-tridentina (1565-1606)*, to analyze different aspects of the Sixteenth century, through a punctual and rigorous reinterpretation of pastoral and educational program developed by Agostino Valier, a very important person of Italian post-Tridentine season, who was bishop of the Diocese of Verona between 1565 and 1606.

**EET/TEE KEYWORDS:** History of Education; Christian Education; Catholicism; Italy; XVI-XVII<sup>th</sup> Centuries.

*Pastoralità ed educazione:* sono queste le due linee guida – opportunamente messe in risalto nel titolo – che caratterizzano il recente e fondamentale lavoro di ricerca di Elisabetta Patrizi<sup>1</sup>. Siamo davanti ad una monografia che si distacca dal consueto panorama degli studi dedicati al sedicesimo secolo, in larga parte riduttivamente incentrati sugli aspetti ereticali e «controriformistici» (nel senso letterale del termine) di questo secolo chiave della storia moderna. La pubblicazione della Patrizi, infatti, consente di apprezzare le innumerevoli

<sup>1</sup> *Pastoralità ed educazione. L'episcopato di Agostino Valier nella Verona post-tridentina (1565-1606)*, 2 voll. (Vol. I: *Vita e azione pastorale*; Vol. II: *Lettere, decreti, ordinamenti e scritti educativi*), Milano, FrancoAngeli (Collana di storia delle istituzioni educative e della letteratura per l'infanzia), 2015, pp. 960.

sfaccettature del Cinquecento devoto, attraverso una rilettura puntuale e rigorosa del programma pastorale ed educativo messo in atto da un personaggio di punta della stagione post-tridentina italiana come il vescovo e poi cardinale Agostino Valier nel corso degli oltre quarant'anni in cui fu alla guida della diocesi di Verona (1565-1606).

La pubblicazione della Patrizi si compone di due tomi, pensati in stretto dialogo l'uno con l'altro. Il primo tomo (*Vita e azione pastorale*) propone un viaggio all'interno della biografia e dell'opera del vescovo di Verona, mentre il secondo (*Lettere, decreti, ordinamenti e scritti educativi*) accoglie le trascrizioni annotate delle testimonianze più esplicite e significative del poliedrico disegno di *reformatio Ecclesiae* valeriano descritto nel primo tomo.

Sintetizzati i dati ricavati dagli studi precedenti su Agostino Valier e fornite le coordinate generali della ricerca (*Introduzione* al vol. I), si apre un percorso di ricostruzione e riflessione sulla vita e sull'opera di Agostino Valier articolato in quattro principali nuclei tematici, ad ognuno dei quali corrisponde una precisa sezione del primo volume. Nei capitoli accolti nella prima sezione (*Gli studi, l'impegno civile e l'insegnamento*) si propone una ricostruzione degli anni giovanili del personaggio studiato, vissuti tra Venezia (la città natia dell'impegno civile e dell'insegnamento presso la Scuola di Rialto) e Padova (la città della formazione umanistica, retorica e filosofica), riservando una particolare attenzione al periodo immediatamente precedente all'elevazione alla cattedra veronese, segnato per un verso da un breve ma intenso soggiorno a Roma (1561-1563), impegnato presso la scuola dell'Accademia delle Notti Vaticane animata dal futuro arcivescovo di Milano Carlo Borromeo; e per l'altro dai lunghi e trepidanti mesi trascorsi a Trento (marzo-dicembre 1563), dove il Valier ebbe la possibilità di seguire, in qualità di accompagnatore dello zio Bernardo Navagero al tempo legato pontificio, le decisive fasi finali del Concilio più importante dell'età moderna.

Con la seconda sezione (*I modelli e gli strumenti dell'azione episcopale*) entriamo nel vivo dell'analisi relativa all'azione episcopale di Agostino Valier. In prima battuta, sono opportunamente definiti i rapporti di debito e i margini di autonomia del disegno valeriano rispetto ai due vescovi modello del Cinquecento, vale a dire Gian Matteo Giberti, colui che aveva anticipato la «svolta tridentina», facendo della diocesi di Verona un laboratorio di riforme, e Carlo Borromeo, colui che più di ogni altro seppe incarnare l'idea di vescovo-pastore prospettata nei decreti tridentini. Successivamente, descritta l'organizzazione e le strutture della diocesi, è messo in risalto il valore educativo degli strumenti di governo ampiamente utilizzati dal Valier, come i sinodi diocesani e le visite pastorali, attraverso un'analisi puntuale della documentazione sinodale conservata presso l'Archivio Storico della Curia Vescovile di Verona e dei verbali delle visite pastorali condotte o promosse dal Valier recentemente pubblicati a cura dello stesso Archivio. Il discorso relativo agli strumenti di governo continua con un ampio focus sulla posizione del

Valier in merito al dovere della predicazione sia come *praecipuum munus* del vescovo, che come linea di intervento cardine dell'attività di *cura animarum* svolta dal clero secolare e regolare. Il tema viene affrontato ricorrendo ad un interessante ventaglio di fonti, a cominciare dalle due opere scritte dal Valier su istanza dell'arcivescovo di Milano Carlo Borromeo, il *De rhetorica ecclesiastica*, edito nel 1574 e destinato ad una lunga fortuna, e l'*Omiliario* per la Chiesa ambrosiana, rimasto inedito, ma nato proprio come «traduzione pratica» dei principi teorizzati nel *De rhetorica*. Dei due scritti si fornisce – facendo luce su numerosi aspetti tralasciati o erroneamente interpretati dalla letteratura precedente – una puntuale ricostruzione delle fasi di elaborazione e un'attenta analisi dei contenuti, riletti anche alla luce del confronto con altri scritti del Valier di carattere personale, come il testo manoscritto *De episcopali forma concionandi*, e di natura squisitamente pastorale, come le numerose lettere rivolte dal vescovo ai fedeli della diocesi e le istruzioni indirizzate «Alli padri predicatori» (p. 217).

La terza sezione consente di prendere in esame le soluzioni messe in campo da Agostino Valier per promuovere il rinnovamento del clero. Su questo versante appare particolarmente efficace la scelta di concentrare la disamina su quattro esperienze chiave dell'episcopato valeriano, ovvero l'istituzione del Seminario diocesano di Verona (1567), portata avanti in parallelo alla riforma dell'antica Scuola degli accoliti, rivelatasi ostile a qualsiasi progetto di fusione con la nuova istituzione di matrice tridentina; la fondazione del Collegio veronese dei padri della Compagnia di Gesù (1578), strenuamente voluto dal Valier a supporto e promozione del sistema formativo integrato da egli impiantato nel tessuto urbano veronese; il progetto di riforma dei monasteri femminili, condotto in continuità con l'operato gibertino e perfezionato secondo le nuove disposizioni conciliari; e, infine, la costituzione della Compagnia di sant'Orsola di Verona (1586), introdotta ad emulazione dell'originaria esperienza bresciana e di quella più tarda milanese promossa dal Borromeo, per accogliere quell'antica istanza di vita religiosa nel mondo che a seguito dell'imposizione tridentina della clausura a tutti gli ordini religiosi femminili necessitava di nuove soluzioni.

Nella quarta ed ultima sezione si affronta l'altro grande versante del programma di edificazione morale e religiosa messo a punto da Agostino Valier per la diocesi di Verona, quello relativo alla riforma del popolo. In questa direzione, si offrono esemplificazioni eloquenti dell'ambizioso progetto pastorale ed educativo valeriano, «animato dall'intento di abbracciare l'intera piramide del corpo sociale attraverso un sistema educativo capillare e diversificato, capace di raggiungere ciascun credente nel rispetto delle sue specifiche condizioni di vita» (p. 370). Un sistema articolato e composito, fatto di scritti pastorali ed educativi pensati per diversi interlocutori ed utilizzi (si pensi ai *Ricordi al popolo della Città et Diocesi di Verona*, 1579, riadattamento del ben noto *Libretto dei Ricordi* del Borromeo, o alla trilogia di trattati indirizzati al mondo femminile, raccolti sotto il titolo di *Institutione d'ogni stato lodevole delle donne*

*christiane*, 1575), di istituzioni educative ed assistenziali specializzate (come il Collegio dei Nobili fondato nel 1577 e la Casa dei Derelitti e delle Derelitte istituite, rispettivamente, nel 1572 e nel 1573), e animato da una costellazione di congregazioni e confraternite di carattere devozionale, assistenziale o precipuamente educativo (basti ricordare, a tale proposito, le confraternite mariane ed eucaristiche diffuse capillarmente in tutto il territorio diocesano, la Compagnia della Carità al centro dell'organizzazione assistenziale cittadina e le numerose Compagnie della dottrina cristiana istituite per la promozione dell'alfabetizzazione religiosa).

L'affresco disegnato nelle dense pagine del primo volume trova una perfetta corrispondenza nell'impianto del secondo volume, che ospita un'ampia selezione di documenti e testi accuratamente annotati, capace di restituirci la ricchezza della «prospettiva pedagogica plurale» (p. 337) che guidò l'azione pastorale di Agostino Valier, interprete infaticabile di quel disegno di rinnovamento e rigenerazione della *societas christiana* che, inaugurato nella stagione pre-tridentina da vescovi lungimiranti del calibro di Gian Matteo Giberti, nel periodo successivo alla chiusura del Concilio conobbe numerosi pastori impegnati ad operare, sulla scorta dell'esempio offerto da Carlo Borromeo, per «consolidare l'immagine e la presenza del cattolicesimo» (p. 495) nei gangli vitali del tessuto sociale.

In conclusione, una monografia originale e riccamente documentata, la quale fa onore alla ricerca storico-educativa italiana, proponendo altresì nuovi e assai fecondi itinerari d'indagine nell'ambito della storia culturale e religiosa dell'età moderna

# Libri per diventare italiani

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## *Books to become italian*

**ABSTRACT:** This paper focuses attention about the recent book of Elisa Marazzi entitled *Libri per diventare italiani. L'editoria per la scuola a Milano nel secondo Ottocento*, to analyze many aspects of the various and complex phases of the constitution of a national educational book market and to present the characteristic and peculiar aspects of Milanese scholastic educative production.

The author then focuses on the role of the book as a tool to educate the younger generations.

**EET/TEE KEYWORDS:** Cultural Identity; Nationalization; Scholarly Publishing; Publishing Industry; Italy; XIX Century.

1. L'evoluzione della moderna editoria scolastica ed educativa si pone all'intersezione di due principali fenomeni che per qualche decennio si svolgono contemporaneamente. Il primo è rappresentato dal sorgere di alcune imprese che si specializzano nel campo della produzione scolastica, predisponendo via via cataloghi sempre più esaustivi in grado di soddisfare le varie esigenze del sistema d'istruzione, da quelle più semplici della scuola elementare a quelle più articolate e complesse dei licei e delle scuole tecniche. Il secondo è costituito da una miriade di piccole tipografie e librerie locali gestite artigianalmente il cui mercato è spesso circoscritto nei confini municipali e, al massimo, provinciali i cui autori erano in genere gli stessi insegnanti del posto.

Tra l'unità e la Grande guerra si compie il graduale e vincente tentativo degli editori maggiori di sottrarre ai tipografi e librai locali gli spazi di mercato in crescita proporzionale in seguito all'aumento degli alunni scolarizzati. Con i primi decenni del Novecento la conquista di spazi sempre maggiori da parte dei marchi più importanti è cosa fatta: si può parlare ormai di un mercato del libro scolastico ed educativo dalle dimensioni nazionali e imprenditoriali.

Un successivo passaggio in tal senso si avrà con la riforma scolastica del 1923 e con le varie successive iniziative del fascismo in materia di politiche

editoriali. Ma in questo caso siamo ormai al di là dei limiti cronologici nei quali si svolge l'ottimo lavoro di Elisa Marazzi<sup>1</sup>.

I mezzi posti in campo furono diversi: una pubblicità capillare dei testi prodotti nei maggiori centri editoriali sui periodici anche locali destinati in specie ai maestri; forme assai disinvolute di concorrenza basate sugli sconti librari; la creazione di reti di filiali distribuite in tutta l'Italia in modo da essere vicini anche alle zone più periferiche e soprattutto cataloghi onnicomprensivi che spaziavano dalla manualistica alle letture amene e ricreative fino alle proposte relative al materiale didattico, alla modulistica e ai libri premio.

Il rapido variare dei programmi di insegnamento tanto nelle scuole elementari quanto in quelle secondarie rese sempre più difficile ai piccoli stampatori e librai di reggere la concorrenza degli editori più attrezzati che potevano avvalersi di autori e collaboratori reclutati a largo raggio.

In queste pratiche di progressiva conquista del mercato – la cui eco è documentata in molti articoli apparsi sul «Giornale della libreria» che lamentavano la spregiudicatezza degli editori più forti – primeggiarono inizialmente le case editrici torinesi (soprattutto Paravia, Loescher, Grato Scioldo) e fiorentine (Barbèra, Le Monnier, Bemporad) cui ben presto si affiancarono, a partire dagli anni '80, le iniziative milanesi più importanti come Trevisini e Vallardi. Entrambi seguirono, per esempio, le strade battute da Paravia e Le Monnier, organizzandosi per agire su territori non solo lombardi o settentrionali. Nello scenario ormai nazionale nel passaggio tra i due secoli un solo editore meridionale, Remo Sandron, percorre un cammino inverso, proponendosi come editore di respiro nazionale a partire dalla sua Palermo.

Il libro di Elisa Marazzi fornisce ulteriore documentazione – oltre a quella già disponibile per l'editoria subalpina e quella fiorentina – per cogliere le diverse e complesse fasi della costituzione di un mercato nazionale del libro educativo (con questa espressione intendiamo i libri di testo veri e propri, le pubblicazioni per i maestri come le guide didattiche e l'editoria amena e dilettevole) mediante la puntuale, preziosa e documentatissima ricostruzione del polo editoriale scolastico milanese.

Il titolo del libro che riflette il punto di osservazione nel quale si dispone l'autrice può essere letto in un duplice senso: «libri per diventare italiani» non solo perché il libro – in generale e quello scolastico-educativo in modo tutto speciale – costituisce uno strumento attraverso cui si persegue con coerente determinazione l'obiettivo di formare coscienze giovanili orientate in senso patriottico e dislocate in un orizzonte non più solo locale (basta pensare alla fortuna del *Bel Paese* di Antonio Stoppani), ma anche perché il mercato nazionale del libro – da quello scolastico a quello destinato ai ceti popolari –

<sup>1</sup> E. Marazzi, *Libri per diventare italiani. L'editoria per la scuola a Milano nel secondo Ottocento*, Milano, FrancoAngeli, 2014.

costituì un tassello in grado di concorrere non secondariamente alla unificazione degli italiani.

2. Nonostante alcune figure milanesi molto attente e interessate alla produzione di buoni libri per la scuola come Giuseppe Sacchi e Carlo Tenca, un tessuto associativo magistrale e civiche amministrazioni impegnate nella diffusione dell'istruzione e nella promozione della scuola popolare e impianti tipografici di prim'ordine, l'editoria educativa decollò a Milano più lentamente che a Torino, a Firenze e alla stessa Napoli per varie ragioni che Marazzi esplora giudiziosamente.

Il libro della Marazzi può essere letto sotto diverse angolature. Proverò a indicarne qualcuna. Esso, in primo luogo, fornisce una dettagliata mappa dei tipografi e librai di Milano impegnati sul versante del libro educativo. Scorrono così le pagine dedicate alle vicende delle quattro più importanti imprese: Antonio Vallardi, Trevisini, Agnelli e Carrara con le peculiari caratteristiche che ne contraddistinsero l'organizzazione interna e la produzione e il contestuale richiamo dei principali collaboratori, figure in quegli anni del tardo Ottocento molto note negli ambienti magistrali milanesi e non solo come, per citarne solo alcuni, Guido Fabiani, Sofia Bisi Albini, Vincenzo De Castro, Raffaele Altavilla, Emma Perodi, Cesare Cantù, Luigi Sailer, Giulio Tarra, Anna Vertua Gentile e molti altri maestri e uomini di cultura che non disdegnarono di mettersi al servizio delle necessità delle scuole del tempo.

Se disponessimo dello spazio necessario sarebbe interessante approfondire la fisionomia intellettuale di questi autori cosiddetti «minori» poco o addirittura quasi totalmente sconosciuti e ora parzialmente riportati alla luce dalle brevi biografie raccolte nel *Dizionario Biografico dell'Educazione*. Ad essi spettò di fiancheggiare gli editori nella fondamentale funzione di mediazione tra la cultura «alta» e quella destinata all'impiego scolastico-educativo. Su questa distinzione pesavano, come è noto, le critiche di Niccolò Tommaseo e di Benedetto Croce e le esplicite riserve di un editore come Pietro Barbèra il quale ammetteva di accostare il genere scolastico al solo scopo di assicurarsi profitti sicuri.

Oggi siamo meno severi e senza ignorare l'approssimazione di molti testi, gli eccessi di un mercato un po' selvaggio desideroso di avvantaggiarsi dall'aumento degli alunni, le compilazioni nello stile che oggi definiremmo del «copia e incolla», dedichiamo agli autori dei libri educativi maggiore attenzione. Se non si approfondiscono infatti le caratteristiche e le diverse fasi della mediazione da essi perseguita si rischia di smarrire i molteplici e variegati sentieri attraverso i quali si compì la conquista dell'alfabeto da parte di milioni di italiani. Il saggio di Elisa Marazzi va proprio in questa direzione, muovendosi con intelligenza critica tra analisi più specificamente editoriali e riflessioni di natura culturale e pedagogica.

Non si comprende appieno la battaglia contro l'ignoranza combattuta dal ceto dirigente post unitario se non si colgono le traiettorie lungo le quali si svolse proprio la mediazione tra i ceti colti e quelli popolari. La letteratura scolastica, quella relativa alle letture infantili e, più ampiamente, quella destinata ai ceti popolari costituiscono fonti assai preziose.

3. All'interno di questa complessiva travatura Marazzi dispone gli aspetti caratteristici e, per così dire, peculiari della produzione scolastico-educativa milanese.

Un significativo aspetto modernizzante consistette, per esempio, nel perseguire una strategia editoriale integrata tra periodici magistrali, libri scolastici e letteratura amena e ricreativa, orientamento che applicò anche all'editoria educativa e pedagogica impostazioni di mercato che si stavano diffondendo tra i maggiori editori del tempo per catturare e fidelizzare un pubblico che, con il trascorrere degli anni, diventava più vario ed esprimeva esigenze diverse.

Non fu un caso che nella città di Sonzogno e Treves – che fondarono la loro fortuna sulla capacità di catturare i lettori attraverso una pluralità di proposte – fosse avviata da un gruppo di maestri un'esperienza pionieristica con analoghe finalità. Mi riferisco alla rivista magistrale «Il risveglio educativo», destinata a essere in seguito replicata da molti editori non solo milanesi.

Intorno al «Risveglio educativo» si raccolse un'élite magistrale di prim'ordine (basta citare personalità come Pietro Pasquali, Carlo Tegon, Aristide Gabelli e naturalmente l'animatore dell'iniziativa Guido Antonio Marcati) che diede vita a un vero e proprio *network* editoriale con periodici per bambini, una collana pedagogica, testi ad uso dei maestri i cui autori erano i medesimi che collaboravano al giornale. Su questa strada si misero, poco dopo, con maggiore respiro e ampiezza di obiettivi Antonio Vallardi e Luigi Trevisini.

Un altro tratto tipico della produzione scolastico-educativa milanese riguarda un intreccio assai efficace tra scuola ed extrascuola. Alcuni editori furono più sensibili al mercato scolastico ed altri invece al genere dei «libri per diletto», ma ad uno sguardo complessivo – così mi è parso di cogliere nelle pagine del libro – si può dire che la produzione milanese ha sue proprie caratteristiche che la distinguono rispetto ai due poli di Torino e Firenze.

Tra il metodismo un po' pedante dei torinesi impegnati soprattutto a sfornare grammatiche e aritmetiche allo scopo di ottimizzare il tempo scolastico a disposizione dei maestri e la tradizione narrativa fiorentina intenta a fornire buoni libri di lettura in linea con una tradizione che in Pietro Thouar aveva il suo principale punto di riferimento, gli editori milanesi si posero su una via mediana. Anch'essa, a sua volta, poteva contare su un consolidato retroterra segnato dalla straordinaria fortuna del *Giannetto* sorto proprio in terra lombarda. In pieno stile pestalozziano il libro del Parravicini era destinato alla scuola, ma



strutturato intorno a una narrazione realistica, ricca di esempi didascalici, ma anche capace di suscitare stupore e sollecitare la fantasia infantile.

La produzione di libri ameni e ricreativi percorre per larga parte con Carrara, Agnelli e Vallardi la traccia del libro utile ed educativo, alieno da eccessi fantastici e avventurosi e perfettamente integrato con le pedagogie dell'obbedienza disciplinata da regole certe e dalla valorizzazione della cultura self helpista in vista del successo personale. La laboriosità degli artigiani descritti nel *Giannetto* erano di gran lunga preferite alle vicende del *Pinocchio* collodiano, opera verso cui i vertici ministeriali, come è attestato, nutrivano qualche riserva.

Questa prevalente concezione normativa delle letture infantili condizionò la produzione nostrana per i bambini ed i ragazzi. Non a caso Treves e Sonzogno, volendo ampliare gli orizzonti nei quali si muovevano gli autori italiani, dovettero aprire i loro cataloghi ad opere straniere e a riduzioni di testi originariamente destinati ad un pubblico adulto come, ad esempio, le avventure di Robinson Crusoe, i viaggi di Gulliver, *L'isola del tesoro* di Stevenson e altri.

Elisa Marazzi dedica un ampio capitolo alla questione delle collane, registrando la lenta, ma graduale dislocazione dei libri sia scolastici sia «di diletto» entro apposite strutture omogenee che rendono più fruibili e coerenti i cataloghi. A questo riguardo vorrei osservare che la creazione delle collane è contestuale ad un altro fenomeno modernizzante e cioè l'articolazione dei libri specialmente scolastici nella forma di testi funzionali non solo ai diversi livelli scolastici (ciò che si può osservare già in Piemonte negli anni '50), ma anche coerenti con la varietà dei destinatari dei libri: maschi e femmine, alunni delle scuole urbane e rurali, adulti da alfabetizzare, militari analfabeti e così via.

Dal punto di vista pedagogico si tratta di un passaggio che consideriamo importante perché segna una sensibilità non più generica verso l'ignoranza, ma la necessità di aggredirla attraverso modalità distinte coerenti con utenze differenziate.

Vorrei, infine, segnalare due ultime caratteristiche dell'editoria scolastico-educativa milanese. La prima riguarda il mercato delle attrezzature didattiche che nel catalogo di Antonio Vallardi si manifesta nel suo grado più alto: soltanto Paravia può tenere il passo dell'editore milanese che tuttavia nella varietà dei prodotti offerti alle scuole (dai banchi ai sussidi didattici, dai registri alle medaglie premio passando per alfabetieri, carte geografiche, cartelloni murali ecc.) a me pare superiore al concorrente torinese. Ma il fatto più interessante che Marazzi pone in giusta evidenza è che, contrariamente a Paravia e ad altri editori che partono dal libro per approdare al materiale, Vallardi compie esattamente il percorso inverso: dal commercio del materiale alla produzione del libro.

Infine non si può dimenticare – Marazzi ne fa un rapido cenno, ma il tema va oltre i confini del suo lavoro – che la presenza nel genere scolastico si manifestò con notevole e anticipatoria evidenza nel settore tecnico-scientifico sia che si

considerino le professioni «alte» (come, ad esempio, gli ingegneri, gli architetti e gli agronomi, ved. la casa editrice Saldini) sia che si guardi al mercato delle scuole e degli istituti tecnici. In questa seconda direzione, senza peraltro del tutto trascurare la prima, era orientata una sezione dei cataloghi di Dumolard, Galli e Omodei, Natale Battezzati, antefatti di quella più ampia e organica iniziativa che proprio intorno alla metà degli anni '70 principiava con Ulrico Hoepli. A queste esperienze si potevano aggiungere parti del catalogo della stessa Francesco Vallardi e le collane di divulgazione scientifica della Fratelli Treves.

Si può senz'altro ricondurre a questo genere di produzione il primo importante apporto dell'editoria milanese alla produzione e diffusione del libro scolastico: mentre a Torino e a Firenze si guardava soprattutto alle scuole liceali, a Milano si moltiplicavano le iniziative volte alla diffusione della cultura tecnico-scientifica.

# In search of children's literature in Russia and the Soviet Union: a critical note to Ben Hellman's volume

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**ABSTRACT:** The work of Ben Hellman – author of numerous books and essays on the history of Russian literature – is the first systematic study in English of the history of literature for children and young people in Russia, a kind of complete manual accessible not only for Western specialists of the discipline but also for the general public. The Author presents the different phases of the development of children's literature through the centuries up to the major change introduced by the October Revolution, when children's literature took on a new educational role, to create a «new man». This major change was to be followed by 70 years of censorship and control over the production of children's books; the «new beginning» of children's literature took place after 1990.

**EET/TEE KEYWORDS:** Children's Literature; History of reading; Russia; Soviet Union; XVI-XXI<sup>th</sup> Centuries.

The work of Ben Hellman<sup>1</sup> – author of numerous books and essays on the history of Russian literature – is the first systematic study in English of the history of literature for children and young people in Russia, a kind of complete manual accessible not only for Western specialists of the discipline but also for the general public. Since Soviet times in Russia, there have been several textbooks that conceived of children's literature as an important educational tool; Western scholars, especially recently, have published collections of essays on the most famous authors, but without offering a description of the general historical context of their poetic and literary trends.

<sup>1</sup> B. Hellman, *Fairy Tales and True Stories. The History of the Russian Literature for Children and Young People (1574-2010)*, London-Leiden, Brill, 2013, pp. XI-588.

Professor of Russian literature at the University of Helsinki, the Author reconstructs nearly four centuries of literary history, presenting authors and major works, trends, critical debates and official cultural policy that prove to be of great interest from the points of view of both literary history and the history of education. Filling an important gap in both these fields, Hellman argues that, «even today, the effects of 75 years of Soviet power are still felt in Russia, and the few serious attempts to write the history of Russian children's literature are rather undermined by principles of selection that are sometimes too narrow and sometimes openly inconsistent» (p. IX).

The Author presents the different phases of the development of children's literature through the centuries up to the major change introduced by the October Revolution, when children's literature took on a new educational role, to create a «new man». This major change was to be followed by 70 years of censorship and control over the production of children's books; the «new beginning» of children's literature took place after 1990.

The twelve chapters that make up this work are comprehensive but concise, brilliant and smooth. Following a chronological thread, the narrative can be divided into three main parts each composed of four chapters, which describe the main literary trends: the first relates to the four centuries preceding the revolutionary period, in particular from 1578 to 1917, the second covers the Soviet period until Stalin's death (1918-1953) and, finally, the period 1954-2010. Romanticism was the era that contributed most to the spread of fiction for children and it should be noted that, as happened to literature in general, newspapers and magazines occupied an important role in Russia, which gradually grew into a nation characterized by a high illiteracy rate and a slow development of the school.

Of course, the method used by Hellman would not be the only one possible, but certainly offers numerous advantages as far as clarity is concerned, as the Author emphasizes: «This is not a self-evident solution and the boundaries of the various periods are admittedly open to debate. This also goes for the term Modernism, here denoting an opening for a multitude of new ideas and a broadening of the very concept of children's literature. As for the Soviet decades it seemed more natural to divide the chapters according to the general political situation» (p. XI).

In the first chapter the Author describes the beginnings of children's literature (1574-1825), in the second writers from the Enlightenment to Sentimentalism (1770-1825); in the third and fourth, Romanticism (1825-1860) and Realism (1860-1890). The starting point of literature for children and young people took place with three different genres that can all be considered part of an educational process from Ivan Fedorov's to Nikolay Novikov's magazine: the very first primer (*Azbuka*) by I. Fedorov (1574) was followed by reading and courtesy books: «All through the eighteenth century, foreign literature dominated children's reading in Russia. Translations were made mainly from

French and German, and for many decades the selection consisted almost solely of information books» (p. 5) such as the first illustrated «children's encyclopedia» by the Czech pedagogue Comenius, *Orbis Sensalium Pictus* (1658); «Among the few longer fictional works that were translated, Daniel Defoe's, *Robinson Crusoe* (1919) [...] and Jonathan Swift's *Gulliver's Travels* [...] stand out [...]. The most widely-read children's book of the eighteenth century was François Fénelon's, *Les aventures de Télémaque, fils d'Ulysse* (1717)» (pp. 5-6).

For the period 1770-1825, from the Enlightenment to Sentimentalism, the Author attributes to Rousseau the «cult of childhood as a time of unspoiled human nature [which] paved the way for Sentimentalism and pre-Romanticism in literature» (p. 7). Among the most important books to be considered the first original works of fiction for children in Russia, didactic dialogues and allegorical tales written by Catherine the Great's were published with the aim of educating «a healthy body and an inclination for goodness»: *The Tale of Tsarevich Khlora* (*Skazka o tsareviche Khlore*, 1781), *The Tale of Tsarevich Fevey* (*Skazka o tsareviche Fevee*, 1783) and the magazine by Nikolaj Novikov, the most remarkable cultural figure from the time of Catherine the Great, *Children's Reading for the Heart and Mind* (*Detskoe chtenye dlya serdtsa i razuma*, 1775-89) addressed to children with no knowledge of foreign languages, with a broad choice of «out-of-school reading material», even though this partly consisted of translations from the German, Campe's famous *Kleine Kinderbibliothek* in particular. Novikov encouraged some writers such as Karamzin and Shishkov in writing for children and in promoting children's magazines in the final decades of the Eighteenth century and in the beginning of the Nineteenth century.

Romanticism was characterized by a proliferation of genres, such as Pushkin's verse poetry, the tales of Zhukovsky, Odoevsky's fantasy, the moral tales in which many women writers were engaged, national history and finally, the folktale pastiche «The little Humpbacked Horse» [*Konyok-Gorbunok*, 1834] by Pyotr Ershov; children's Magazines were also particularly successful among girls. The chapter ends with the critic's consideration on children's literature and in particular that by Belinsky, who reveals an extraordinary intellectual wealth in nineteenth century Russia: «Children's literature should be read and discussed on the same terms as literature for adults. A children's book had to be a work of art, and not just an illustration of some ethical rule or didactic principle. In an article of 1847, Belinsky stated his opinion that 'the only work for children that is good and useful is that which adults can read with interest and develop a liking for, not as a work for children, but as a literary work written for everyone» (p. 73).

The chapter on Realism is the richest of the volume in which the Author presents a critical vision of contemporary literature because: «the novels of Goncharov, Turgenev, Dostoevsky and Tolstoy became part of world literature. The achievements of contemporary children's literature are not as remarkable, even though it showed the same turn towards Realism during the second half

of the nineteenth century [...]. If the 1860s were still bleak and translation-dominated, the 1870s changed the picture. Children's literature became more heterogeneous as the choice of theme, subject and style grew wider. New milieus were introduced, also illuminating the life of the poor peasantry or that of the workers in the outskirts of the big cities» (p. 77). Among the emerging writers there was also a host of women including Vera Zhelikhovskaya, Aleksandra Annenskaya, Ekaterina Sysoeva, Evgeniya Tur and other lesser known but no less important authors including Mikhail Chistyakov, Pavel Zasodimsky, Dmitry Mamin-Sibiriyak, Vasily Nemirovich-Danchenko and Aleksandr Kruglov. In this chapter, after the analysis of the critical debate led by Nikolay Chernyhevsky, Nykolay Dobrolyubov and Dmitry Pisarev, the Author analyzes the production of new primers and reading books, published in this period (by Konstantin Ushinsky and Lev Tolstoy), and then dedicates space to significant writers such as Antony Pogorelsky, Mikhail Chistyakov, Pavel Zasodimsky, Dmitry Mamin-Sibiriyak, Vasily Nemirovich-Danchenko, Aleksandr Gruglov and Aleksey Slivitsky. With methodological rigor, the Author describes, for this period, the various features of fairy tales and fantasy, informative literature, poetry for children, children's magazines and translations of foreign works, and concludes with literary criticism.

Chapters 5-8 make up the second part which is the most important part of the volume, presents Modernism (1890-1917), «All the colours of the rainbow» (1918-1932); a new literature for a new society (1932-1940), and finally children's literature of the Stalinism (1941-1953). In the chapter on Modernism, the Author describes in great detail the increase of the publication of newspapers for children, the publishing houses, and also the widening readership: «At the turn of the century around 500 children's books were published annually, and at the threshold of the First World War, that number had doubled. The most popular magazines had thousands of readers. The potential public was substantial. In 1914, 48 percent of Russia's population, that is, around 85 million, were under 19 years of age. Admittedly, illiteracy was still a huge problem, but reforms were under way» (p. 169).

Besides the proliferation of publishers, a new literary phenomenon indulging readers' tastes emerged with Lidiya Charskaya: «in almost all of Charskaya's books, girls are in the foreground. Her heroines are complex personalities with an intense emotional life. These fascinating and talented teenage girls were ready-made objects of self-identification, as Beth Holmgren has pointed out» (p. 183). Lidiya Charskaya exerted a great influence on the writers of those years (including Nadezhda Lukhmanova and Klavdiya Lukhashevich), who were writing for a diverse audience. Some children's authors dedicated themselves entirely to this readership, but not with the same inspiration as Lidiya Charskaya because with Nikolay Poznyakov, Vasily Avenarius, Konstantin Stanyukovich and other writers «the defence of the outcast remained the abiding theme» (p. 208).

Hellman then goes on to analyze contemporary nature writers, the intensive translation of foreign authors, informative literature and the important reasons for the increase of children's magazines. He concludes with literary criticism: «the interest that Russian pedagogues took in children's literature at the beginning of the twentieth century was another indication of the growing prestige of the genre» (p. 279). The chapter ends with the description of the famous Korney Chukovsky, who «worked hard to stimulate awareness of the 'dangers' of mass-produced children's literature» (p. 288). In 1917 Chukovsky was responsible for a very important event in the history of children's literature with his publication of the children's magazine «The Crocodile» [*Krokodil*, 1917]: «Tradition and innovation meet harmoniously in *Krokodil*. Chukovsky introduced the modern city and technology into Russian children's poetry, but at the same time he built on the legacy of folktales, which in the source of features like anthropomorphism, an outwardly insignificant and weak hero, and the final collective victory celebration. The elements of improvisation and playfulness are striking» (p. 291).

Through chapter six to eight, Hellman analyzes writers and works of the revolutionary period to the early fifties. In the sixth chapter, entitled «All the colors of the rainbow (1918-1932)», dedicated to the Revolution of 1917, the Author describes the process of creating «a new children's literature» that had to correspond to the ideology of new Bolshevik regime and the Soviet, the role of different publishing houses (Raduga, Detgiz, Oberiu) and the birth of the institutions established to implement the strategies of reading, children's literature production, and the tendencies of this new phase in the period between the October Revolution and Lenin's death. The writer Maksim Gorky, who already had an interest in children's literature before the Revolution, became an active collaborator first with the Bolshevik Party and later with the Soviet regime.

Of particular interest is the publication of numerous magazines related to the Young Pioneer organization that promoted active participation in the construction of the new society. Among the authors, poets and writers of the most important Revolutionary period were Vladimir Mayakovsky, Korney Chukovsky, Samuil Marshak, the *Oberiu*'s writers (that is belonging to the Association for Real Art) and finally Borish Zhitkov, who knew how to combine experimentation, literary inspiration and faith in the new revolutionary regime.

In chapters 7-8, the Author describes how the dominant role of ideology compelled many writers to adhere to the canons of Communist ideology, in particular from the beginning of 1932 to the beginning of the fifties. Chapter 7, «A new society – a new literature (1932-1940)», is dedicated to the progressive exploitation of children's literature for educational and political aims, the debates that characterized this process, the role of writers such as Gorky, and the foremost authors of the Thirties, Arkady Gaydar and Lev Kassil. Both wrote highly successful books for children that described portraits of young

positive heroes acting in defense of the regime, even during the war, ready to die to defend the fatherland. During the war years, «Under the wise leadership of the Party and the Fatherly care of comrade Stalin (1941-1953)», as Hellman argues, «on the whole, the standard of children's literature in the last decade of Stalin's rule was low» (p. 437), because of the preponderance of issues such as educational work and the school-novel. The years of Thaw were characterized by a renewal thanks to authors including Lyubov Voronkova, Anatoly Aleksin, Anatoly Rybakov, Nikolay Nosov, and Yury Sotnik, who in some cases had already made their debut during the war years.

The last four chapters of the third part are very concise and cover the period from the death of Stalin to post-communist Russia, and in particular the authors of the Thaw (1954-1968), the years of Stagnation (1969-1985), *perestroika* in children's literature (1986-1991) and finally the new children's literature (1991-2010). In chapters 9-10 the Author deals with writers from the death of Stalin up to the beginning of *perestroika*. «The Thaw saw the emergence of a new generation of writers with their own aesthetic vision and literary programme. Children's literature opened out in terms of subject matter and style. In prose, there was a break with well-trying models and conventions, allowing writers to give a psychologically sharper portrayal and a darker but often more plausible picture of the conditions in which Soviet children grew up» (p. 473): Russian translations of Gianni Rodari's works also contributed to the renewal of children's literature. Hellman also dealt with the role of the Congress of the writers in the post-war period (1954 and 1959) in the definition of a new trend and canons in children's literature; poets such as Samuil Marshak, Chukovsky Korney, Agniya Barto and Sergey Mikhalkov; girls' stories on the theme of war; non-fiction for children and some of the best known authors such as Nikolay Nosov with his *Neznayka* series, and others, based on the book by Palmer Cox, dedicated to childlike Lilliputians (no bigger than gherkins), living in an alternative world, beyond all conventional time and place.

In the final two chapters, Hellman presents the most significant authors of the complex period of Stagnation and the collapse of the Communist regime, focusing on Eduard Uspensky (still living) with his wonderful *Cheburashka* stories and the poetry he wrote during those years. Hellman describes the authors of *perestroika* until the Fall of the regime, concluding that «New Russian children's literature had difficulty living up to great expectations. Some established writers deserted the field for more prestigious and profitable literature, while others made desperate efforts to adjust themselves to a life of creative freedom. New literary talents stepped forwards, but their number was as restricted as their choice of genres and themes» (p. 564).

The history of children's literature in Russia and the former Soviet Union presented by Hellman is an endless gallery of writers, all well-placed in their historical context. There are many original aspects that make this book a study of great scientific value for scholars and students of this discipline which is often



ignored by historians of literature. The book, in fact, not only traces the history of children's literature with a look at the main literary trends, something that is often overlooked in the study of the discipline, but also searches children's books by foreign authors translated into Russian.

Particularly brilliant is the presentation of the history of children's literature in relation to the evolution of the concept of childhood, to the production of primers and literary criticism, revealing original debates about children's literature. It is a magnificent work that offers a good starting point to learn more about several authors of a literary production for children that was one of the richest, if not the richest, in the history of world literatures.



# Giovanni Marchesini e la crisi del positivismo pedagogico italiano

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## *Giovanni Marchesini and the crisis of positivism italian pedagogic*

**ABSTRACT:** This article intends to make a reflection on the figure of Giovanni Marchesini, philosopher and distinguished educator born in the second half of the nineteenth century and important representative of Italian positivism. Starting from the recent book *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, edited by Giuseppe Zago, the author highlights the most significant steps in the Marchesini scientific production and his fundamental contribution to the Italian school system.

**EET/TEE KEYWORDS:** History of Education; Positivism; Pedagogical Theory; XIX-XX<sup>th</sup> Centuries; Italy.

Allievo brillante di Roberto Ardigò, massimo esponente del positivismo italiano, Giovanni Marchesini, filosofo, pedagogista ed educatore, rappresenta sicuramente una di quelle figure meritevoli di un'attenta e puntuale rilettura da parte della più recente storiografia. Proprio tale obiettivo è alla base del volume curato da Giuseppe Zago, *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*<sup>1</sup>, sessantaduesimo titolo della collana «Paideia» per la casa editrice Pensa MultiMedia, costituito da un'*Introduzione* e nove contributi che rappresentano senza dubbio un innovativo e felice arricchimento alle ricerche condotte sulla figura di Giovanni Marchesini<sup>2</sup>. Appartenente alla

<sup>1</sup> G. Zago (ed.), *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, Lecce-Brescia, Pensa MultiMedia, 2014.

<sup>2</sup> Tra i più recenti e validi lavori su Giovanni Marchesini si segnalano in particolare F. De Vivo, *La Scuola pedagogica di Padova (1906-1923)*, «Annali di storia dell'educazione e delle istituzioni scolastiche», vol. 11, 2004, pp. 187-196; M. Portale, *Giovanni Marchesini e la «Rivista*

seconda generazione dei positivisti italiani, nato da famiglia di modeste origini nel 1868 e morto dopo una sfibrante malattia nel 1931, egli compì i suoi studi universitari a Padova, dove si laureò in Filosofia<sup>3</sup> proprio con Roberto Ardigò, di cui rimase sempre affezionato discepolo. Proprio questo stretto e «devoto» rapporto con il suo maestro, ha fatto sì che per quasi mezzo secolo la storiografia filosofica e pedagogica, soprattutto sulla scia del tranciante giudizio neoidealista espresso da Croce e Gentile, considerasse il pedagogista originario di Noventa Vicentina come il fedele continuatore del positivismo di Ardigò ed il suo pensiero come una delle manifestazioni più evidenti della crisi che travagliava il Positivismo «destinandolo ad una rapida eclissi»<sup>4</sup>. Proprio per questo motivo, dunque, per un periodo di tempo anche molto lungo, la storiografia ha messo in evidenza principalmente i limiti del pensiero di Marchesini e giudicato «sostanzialmente fallito il suo tentativo di superare la crisi del discorso positivistico a causa della sua scelta di non abbandonarne i tradizionali fondamenti»<sup>5</sup>.

Pur riconoscendo che questa interpretazione abbia trovato un qualche fondamento nelle stesse opere di Marchesini che costantemente si è richiamato alla lezione del maestro sottolineando la sua fedeltà, obiettivo dell'intero volume curato da Zago è tuttavia quello di «portare qualche ulteriore elemento di charificazione e di valutazione su un pedagogista e su un ambiente culturale poco studiati, o presentati, a volte, in forme criticamente discutibili»<sup>6</sup>. Marchesini viene pertanto riletto come la «coscienza inquieta» della crisi del positivismo e il suo pensiero come il momento di tensione verso soluzioni che, pur non prive di limiti (peraltro molto onestamente e attentamente evidenziati nei vari saggi che compongono il volume), lo proiettano oltre i tradizionali confini e lo caratterizzano anche per non pochi accenni alla modernità.

Come sottolineato da Giuseppe Zago, infatti, nella sintetica ma assai esaustiva *Introduzione* del volume, il suo «positivismo idealistico» (così lo definì lo stesso Marchesini), tutto focalizzato sulla «interpretazione integrale dell'esperienza», può rivelare «inaspettati elementi di originalità»<sup>7</sup>. Marchesini, infatti, lungi dal

*di filosofia e scienze affini: la crisi del positivismo italiano*», Milano, FrancoAngeli, 2010 nonché la voce *Marchesini Giovanni Battista*, curata da Marco Antonio D'Arcangeli, in G. Chiosso, R. Sani (dir.), *Dizionario Biografico dell'Educazione 1800-2000*, 2 voll., Milano, Editrice Bibliografica, 2013, vol. II (L-Z), pp. 97-98.

<sup>3</sup> Dopo aver concluso le scuole elementari nel suo paese natale di Noventa Vicentina (Vicenza), Marchesini entrò nel seminario vescovile di Vicenza dove frequentò il ginnasio e il primo anno di liceo; quindi, lasciato il seminario, si trasferì a Padova dove concluse gli studi secondari presso il Liceo Classico «Tito Livio». Nella città padovana si iscrisse alla Facoltà di Lettere e Filosofia nella quale conseguì la laurea nel 1888.

<sup>4</sup> Cfr. G. Zago, *Introduzione*, in Id. (ed.), *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., p. 9.

<sup>5</sup> *Ibid.*

<sup>6</sup> *Ibid.*, p. 14.

<sup>7</sup> *Ibid.*

dar vita ad un «eclettismo di comodo»<sup>8</sup>, avvertì più di ogni altro l'esigenza di avviare una revisione organica ed una ricostruzione critica dall'interno dell'orientamento positivistico. In questo suo tentativo, come opportunamente sottolineato in numerosi passaggi dei vari saggi che compongono il volume di Zago, egli riuscì a dare spazio a istanze solitamente negate o comunque troppo spesso dimenticate dai positivisti, cercando altresì di spostare il *focus* dei propri interessi speculativi dalla natura in generale all'uomo, alla sua formazione nella storia e nell'educazione.

Al pari degli altri giovani allievi di Ardigò, infatti, Marchesini orientò il proprio impegno soprattutto verso l'approfondimento e la chiarificazione di questioni di ordine etico ma, a differenza dei suoi colleghi, si impegnò a tradurle costantemente in termini pedagogici con un sempre crescente interesse educativo. Il saggio che apre il volume, curato dallo stesso Zago e dal medesimo titolo dell'opera (*Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*)<sup>9</sup>, ripercorre con dovizia di particolari l'evoluzione del pensiero di Marchesini in rapporto alle sue opere principali, soprattutto in campo etico e pedagogico.

Docente di Filosofia morale dal dicembre 1900 presso l'Università di Padova e quindi trasferito dal 1922 sulla cattedra di Pedagogia<sup>10</sup>, nelle sue «lezioni-conversazioni-dialogo», come le definì il suo studente illustre Giuseppe Flores D'Arcais in una commemorazione letta presso l'Accademia Patavina di scienze, lettere ed arti nel 1982<sup>11</sup>, Marchesini viene riconosciuto da Zago come il pedagogista per eccellenza del positivismo padovano, non solo per il suo trentennale impegno accademico ma anche per aver sempre messo al centro della sua riflessione il problema pedagogico, «spesso in modo esplicito, altre

<sup>8</sup> *Ibid.*, p. 12.

<sup>9</sup> *Ibid.*, pp. 15-66.

<sup>10</sup> La carriera da insegnante di scuola secondaria prima e da docente universitario poi portò Marchesini a girare per tutta l'Italia. Dopo aver iniziato ad insegnare nella scuola già dal 1889 peregrinando in vari ginnasi e licei della penisola (da Vasto nel chietino a Castelmaggiore nel cremonese, da Oneglia in Liguria fino a Sassari), egli conseguì l'abilitazione all'insegnamento della Filosofia nel 1893 e fu costretto a trasferirsi a Cagliari. Nel 1895 fu accolta la sua richiesta di avvicinamento alla famiglia e poté pertanto trasferirsi al Liceo Classico «Ludovico Ariosto» di Ferrara città nella quale ottenne anche, per incarico, l'insegnamento di Filosofia del diritto presso il locale ateneo ferrarese, allora Libera Università. Trasferitosi nel 1899 al Liceo Classico «Tito Livio» di Padova che l'aveva visto studente pochi anni prima e conseguita la libera docenza, nel dicembre 1900 intraprese la sua vera carriera accademica presso l'Università di Padova dove tenne il corso di Filosofia morale, prima come libero docente, poi come straordinario (1902) e infine come ordinario (1906). Dall'anno 1922-1923 fu trasferito alla cattedra di Pedagogia che teneva per incarico già da circa 20 anni. Per la ricostruzione dettagliata della carriera ultra quarantennale di Giovanni Marchesini prima nella scuola, poi nell'università, si vedano i documenti contenuti in Archivio Centrale dello Stato, Ministero della Pubblica Istruzione, Direzione Generale dell'Istruzione Superiore, fondo *Personale* (1900-1940), b. 96.

<sup>11</sup> Cfr. G. Flores d'Arcais, *Giovanni Marchesini a cinquant'anni dalla morte*, in *Atti e memorie dell'Accademia Patavina di Scienze, Lettere ed Arti*, vol. 94, 1981-1982, Padova, Società Cooperativa Tipografica, 1983, pp. 113-123 (la citazione è a p. 116).

volte – come quando affronta temi di ordine filosofico, etico o sociale, in modo meno diretto ma pur sempre evidente»<sup>12</sup>.

Attraverso la sua copiosa, fortunata e composita messe di pubblicazioni, che spazia da temi di tipo generale e di tipo storico, a questioni prettamente scolastiche e didattiche (come la formazione religiosa, artistica, militare e sessuale) fino alla produzione di manuali per la scuola secondaria, emerge una linea di pensiero che, partendo dalla riflessione sulla crisi del positivismo contenuta in una importante pubblicazione del 1898 (*La crisi del positivismo e il problema filosofico*)<sup>13</sup> e in alcuni articoli pubblicati su un prestigioso periodico da lui fondato e diretto nel 1899 («Rivista di filosofia, pedagogia e scienze affini»)<sup>14</sup>, si sviluppa in maniera coerente passando attraverso tre fasi differenti (la prima riconducibile ai primi anni del Novecento, la seconda che copre il periodo dal 1907 al 1922 e la terza relativa agli anni conclusivi della vita del pedagogista)<sup>15</sup>, per concludersi con un approdo squisitamente pedagogico, e cioè con quella pedagogia del «come se»<sup>16</sup> che costituisce, secondo Zago, il contributo più originale di Marchesini in questo settore.

L'evoluzione del pensiero filosofico di Marchesini è invece ben ricostruita nel contributo di Mario Quaranta (*Il pensiero filosofico di Giovanni Marchesini*)<sup>17</sup> che si sofferma in modo particolare sulla riflessione etica operata da colui che a Padova, roccaforte del «positivismo filosofico», insegnò Filosofia morale per oltre venti anni. Marchesini, intervenendo nella revisione del pensiero filosofico ed etico del suo maestro Ardigò, giunse ad una posizione conclusiva che andava ben oltre il positivismo naturalistico del suo maestro, approdando, come ben

<sup>12</sup> Cfr. Zago, *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., p. 17.

<sup>13</sup> G. Marchesini, *La crisi del positivismo e il problema filosofico*, Torino, F.lli Bocca, 1898.

<sup>14</sup> Inizialmente questa rivista nacque con il nome di «Rivista di filosofia e pedagogia», poi subito modificato provvisoriamente in «Rivista di filosofia, pedagogia e scienze affini» e quindi, dal 1901, nel definitivo «Rivista di filosofia e scienze affini». Essa trovò in Ardigò il riferimento teorico principale tanto da ospitare ogni anno almeno tre o quattro articoli dell'ormai anziano filosofo. Nei suoi dieci anni di vita (1899-1908) tale periodico costituì il principale luogo di elaborazione e di rinnovamento del Positivismo, in quanto conteneva espliciti tentativi di superamento dei limiti concettuali, ormai sempre più evidenti, di questo orientamento. Attorno alla rivista, che Marchesini diresse fino alla cessazione delle pubblicazioni (1908), si raccolse la prima generazione degli allievi di Ardigò (come Tarozzi, Dandolo oltre naturalmente a Marchesini), come pure la seconda, formata dai più giovani Groppali, Troilo, Levi e Limentani. Sulla nascita e l'evoluzione della rivista nonché sui suoi contenuti di carattere pedagogico si veda la dettagliata scheda presente in G. Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, Brescia, Editrice La Scuola, 1997, pp. 558-559.

<sup>15</sup> Per una più ampia descrizione delle tre «tappe» che hanno caratterizzato la produzione scientifica di Marchesini e le sue relative elaborazioni pedagogiche si rimanda alla lettura di Zago, *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., pp. 19-20.

<sup>16</sup> Marchesini teorizzò la sua pedagogia del «come se» nel volume G. Marchesini, *La finzione nell'educazione e la pedagogia del "come se"*, Torino, Paravia, 1925.

<sup>17</sup> M. Quaranta, *Il pensiero filosofico di Giovanni Marchesini*, in Zago (ed.), *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., pp. 67-92.

spiega Quaranta «ad una forma di relativismo» e, sul terreno etico, elaborando «un'etica fondata sulle idealità, in ciò continuando il pensiero di Ardigò, ma senza quell'ancoraggio essenzialmente 'naturale' condizionante strettamente le azioni umane, ribadendo così il valore essenziale della libertà»<sup>18</sup>.

Lo stesso Quaranta, nel suo saggio, si sofferma anche su un altro aspetto del pensiero filosofico di Marchesini ad oggi meno indagato ma ugualmente significativo, quale l'interpretazione del misticismo che impegnò il docente patavino soprattutto negli anni conclusivi della sua vita. A tal proposito, Quaranta ha sottolineato come Marchesini abbia rivelato nelle sue idee una concezione decisamente opposta a quella espressa dal modello fisiologico sostenuto da positivisti di spicco, tra cui ad esempio Giuseppe Sergi, risentendo fortemente al contrario degli insegnamenti dello spiritualista cristiano Francesco Bonatelli che insegnò all'Università di Padova negli anni giovanili di Marchesini e che può essere, a ragione, considerato il suo secondo maestro illustre. Marchesini, infatti, seguendo i dettami del Bonatelli ma andando anche oltre alcune sue teorizzazioni, non espunse il fenomeno mistico fuori dalla ragione, come fosse un fenomeno «strano» rientrando nell'occulto e nell'esoterico o nel patologico, bensì lo considerò un fenomeno del quale era possibile fornire una «spiegazione psicologica razionale»<sup>19</sup>.

Il saggio di Fabio Grigenti (*Il "finzionismo" di Marchesini e di Vaihinger. Analogie e differenze*)<sup>20</sup>, prendendo anch'esso in esame alcuni aspetti filosofici del pensiero di Marchesini ed elogiando l'estrema chiarezza di una «una scrittura condotta senza oscurità, nella quale il ragionamento si snoda con eleganza attraverso serie successive di argomentazioni costruite con rigore»<sup>21</sup>, presenta numerosi chiarimenti e approfondimenti sul rapporto tra il *finzionismo* di Marchesini e la contemporanea *Philosophie des Als Ob* (1911)<sup>22</sup> del tedesco Hans Vaihinger, evidenziando tra i due pensatori concezioni simili per certi versi ma molto differenti nelle prospettive di fondo.

Sempre in chiave comparatistica deve essere inquadrato il contributo di Carla Callegari (*Giovanni Marchesini e Aristide Gabelli. Analisi di testi per un confronto pedagogico*)<sup>23</sup> che mette a confronto la pedagogia di Aristide Gabelli, positivista della prima generazione, con quella di Marchesini alla scopo di

<sup>18</sup> *Ibid.*, p. 71.

<sup>19</sup> *Ibid.*, p. 89.

<sup>20</sup> F. Grigenti, *Il "finzionismo" di Marchesini e di Vaihinger. Analogie e differenze*, in Zago (ed.), *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., pp. 93-114.

<sup>21</sup> *Ibid.*, p. 93.

<sup>22</sup> H. Vaihinger, *Die Philosophie des als ob: System der theoretischen, praktischen und religiösen Fiktionen der Menschheit auf Grund eines idealistischen Positivismus. Mit einem Anhang über Kant und Nietzsche*, Berlin, Reuther & Reichard, 1911.

<sup>23</sup> C. Callegari, *Giovanni Marchesini e Aristide Gabelli. Analisi di testi per un confronto pedagogico*, in Zago (ed.), *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., pp. 115-176.

valutare in che modo il pensiero di Gabelli, sicuramente meno sistematico di quello di Ardigò, sia presente in quello «idealistico» di Marchesini. Da un'analisi molto accurata e rigorosa di alcuni brani tratti dalle opere pedagogiche più significative di Gabelli e Marchesini, la Callegari sottolinea come, pur recependo la lezione di Gabelli soprattutto dal punto di vista metodologico, il docente patavino finirà per distaccarsene recuperando decisamente il «valore dell'autoeducazione, considerata quale arte e sviluppo dello spirito»<sup>24</sup>.

Inoltre, secondo la Callegari, Gabelli in più di un'occasione aveva sottolineato come l'osservazione non fosse sufficiente da sola a garantire apprendimento se non accompagnata dalla riflessione e Marchesini, in linea con le sue teorie, aveva messo in risalto e portato a compimento questo aspetto, esplicitandolo, nell'accostare al pensiero di Gabelli quello di Giovanni Colozza, docente ad inizio Novecento di Pedagogia, prima a Napoli e poi a Palermo, il quale affermava che nell'apprendimento fossero coinvolte attività proprie dello spirito, per mettere in evidenza come la sola e pura esperienza non fosse sufficiente in educazione. Marchesini tentava così un superamento del «positivismo materialistico e meccanico in favore di un positivismo umanistico nel quale potessero coesistere un aspetto naturalistico ed uno spiritualistico o psicologico, tratto questo, a suo giudizio, proprio del Pragmatismo»<sup>25</sup>.

Particolarmente brillante ed originale risulta quindi il contributo di Fabio Targhetta (*Giovanni Marchesini, dalla riflessione sull'educazione all'impegno per la scuola*)<sup>26</sup> nel quale sono ben evidenziati il contributo offerto da Marchesini alla scuola italiana e i suoi interventi a favore di un forte rinnovamento della stessa. Come sottolinea Targhetta, l'attenzione nei confronti delle tematiche educative, dai programmi di insegnamento alla preparazione degli insegnanti alla didattica, fu pressochè costante nella produzione del pedagogista vicentino. Il suo interesse per certi temi iniziò a maturare sul finire del secolo e finì per crescere in maniera costante negli anni successivi, «parallelamente all'ampliamento del dibattito sulla riforma della scuola avviato nei periodici specializzati e nelle aule parlamentari»<sup>27</sup>.

In particolare, secondo Marchesini, che dal luglio 1913 al giugno 1917 fece anche parte del Consiglio Superiore della Pubblica Istruzione, una vera e propria rigenerazione intellettuale e morale degli italiani, reclamata come urgenza non più procrastinabile, doveva necessariamente passare attraverso la scuola e soprattutto attraverso i maestri e gli insegnanti in genere. Positivista, teorico di una scuola aconfessionale, il pedagogista veneto elevava la «scuola a

<sup>24</sup> Cfr. Zago, *Introduzione*, cit., p. 13.

<sup>25</sup> Cfr. Callegari, *Giovanni Marchesini e Aristide Gabelli. Analisi di testi per un confronto pedagogico*, cit., pp. 153-154.

<sup>26</sup> F. Targhetta, *Giovanni Marchesini, dalla riflessione sull'educazione all'impegno per la scuola*, in Zago (ed.), *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., pp. 177-202.

<sup>27</sup> *Ibid.*, p. 177.



tempio del sapere, sacralizzando in qualche modo la sua funzione ed investendo l'insegnante di un ufficio missionario, pari a quello del predicatore»<sup>28</sup>.

Al maestro dunque il compito di formare gli alunni negli ideali e soprattutto di avviarli al culto del dovere e della responsabilità personale. Secondo Marchesini all'insegnante, non solo di scuola elementare, era affidato l'incarico di educare moralmente gli alunni, pena il fallimento della funzione educativa della scuola. Per riuscire nella sua missione, però, il docente doveva saper parlare al cuore dei ragazzi, evitare il nozionismo e la pedanteria e soprattutto avere la capacità di provocare sapientemente la collaborazione degli studenti rifiutando in questi ultimi ogni forma di passività mnemonica e verbalistica.

Alla luce di queste idee si spiega il notevole impegno profuso dal Marchesini per la nascita e lo sviluppo del *Corso di perfezionamento per i licenziati delle scuole normali* attivato dall'Università di Padova nel 1908 e del quale egli fu direttore e animatore fino alla chiusura decretata nel 1923 per effetto della Riforma Gentile. Come ben ricostruito da Targhetta, tale Scuola pedagogica (così erano solitamente chiamati questi corsi) soddisfò dignitosamente gli intenti con cui era nata e molti furono i docenti illustri che vi insegnarono. Tra questi, oltre al Marchesini stesso, meritano una particolare menzione Federico Cammeo per la Legislazione scolastica, Camillo Manfroni per la Storia moderna, Alberto Graziani per l'Igiene e Alfredo Rocco per la Legislazione scolastica e gli elementi di diritto amministrativo.

Al *Dizionario delle scienze pedagogiche*, strumento di valore della ricerca pedagogica italiana, che Marchesini ideò e diresse negli ultimi anni della sua vita, pubblicato in due volumi nel 1929 per la Società Editrice Libreria<sup>29</sup>, è dedicato il lavoro di Mirella Chiaranda (*"Dizionario delle scienze pedagogiche" e Pedagogia italiana del Novecento*)<sup>30</sup>. A tale iniziativa editoriale collaborarono oltre 40 studiosi, molti dei quali anche di indirizzo non positivista, che redassero ben 243 voci. Proprio operando una lettura trasversale delle voci più significative, la Chiaranda riesce ad inquadrare storicamente, a ricostruire e a comparare posizioni e autori diversi su alcuni nodi fondamentali, quali l'epistemologia pedagogica, il rapporto filosofia-pedagogia e gli aspetti metodologici e didattici. Come spiega bene la stessa autrice il grande pregio del *Dizionario* è quello di proporre al lettore, secondo un ordine alfabetico, «voci ed argomenti ritenuti essenziali alla formazione di una cultura educativa vivificante la prassi»<sup>31</sup>.

<sup>28</sup> *Ibid.*, p. 179.

<sup>29</sup> G. Marchesini (dir.), *Dizionario delle scienze pedagogiche. Opera di consultazione pratica con un Indice sistematico*, 2 voll., Milano, Società Editrice Libreria, 1929.

<sup>30</sup> M. Chiaranda, *"Dizionario delle scienze pedagogiche" e Pedagogia italiana del Novecento*, in Zago (ed.), *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., pp. 203-242.

<sup>31</sup> *Ibid.*, p. 205.

Nell'opera Marchesini offre poi alcune sue concezioni della realtà educativa, spiegando il significato pedagogico dell'autorità dell'adulto e delle istituzioni, la natura peculiare dell'incontro tra maestro e discepolo, la prospettiva armonica della teleologia. Come sottolineato dalla Chiaranda, secondo Marchesini, la «naturalità spirituale dell'educazione, finalizzata a progressivi atteggiamenti liberi e creativi, in sintonia con le idealità individuali e sociali della cultura storica e dell'ambiente civile e politico, esige un tessuto di esperienze e di relazioni con le cose, le leggi, gli uomini, la ricerca scientifica rinnovata» da attribuire principalmente «al concetto di autorità»<sup>32</sup>.

Il *Dizionario delle scienze pedagogiche* e l'esame della voce in esso contenuta dedicata alla letteratura per fanciulli e curata da Cesira Viviani è il punto di partenza del contributo di Giordana Merlo (*La letteratura per fanciulli nella voce curata da Cesira Viviani nel "Dizionario delle scienze pedagogiche"*)<sup>33</sup> che, attraverso un discorso chiaro ed organico, giunge a delineare il quadro degli studi non solo sugli autori e sui libri per l'infanzia ma anche quello sulle teorie, relative a questo genere letterario, presenti in Italia sul finire degli anni Venti.

Molto interessante è anche la riflessione della Merlo sulla scelta terminologica operata dalla Viviani che utilizza l'espressione «letteratura per fanciulli», a suo giudizio meno usata ma più precisa della più diffusa «letteratura infantile». In tal modo, secondo l'autrice del saggio, la Viviani sembra «far proprie le sollecitazioni provenienti dalla critica crociana in ordine all'impossibilità di parlare di un'espressione artistica pensata per i più piccoli e diversa da quella rivolta al mondo adulto» (p. 275). Secondo la Merlo si tratterebbe però di un'adesione superficiale o comunque non pienamente convinta alla teoria crociana se non altro per la sottolineatura che l'autrice fa «in ordine alla necessità di non dimenticarsi mai del destinatario lettore»<sup>34</sup>. Quindi, se da una parte la Viviani sostiene che una «significativa quantità di opere pensate e prodotte per gli adulti possono in qualche modo e con le debite riduzioni diventare una piacevole lettura per i bambini», dall'altra afferma che «una letteratura per l'infanzia si è definita storicamente con la presa di coscienza del soggetto bambino e delle sue peculiarità»<sup>35</sup>.

Ad arricchire e rendere ulteriormente interessante e completo il volume curato da Giuseppe Zago, contribuiscono, infine, il dettagliato *Profilo biografico*<sup>36</sup> di Giovanni Marchesini redatto dallo stesso Zago, nonché una sintetica e

<sup>32</sup> *Ibid.*, pp. 209-210.

<sup>33</sup> G. Merlo, *La letteratura per fanciulli nella voce curata da Cesira Viviani nel "Dizionario delle scienze pedagogiche"*, in Zago (ed.), *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., pp. 243-278.

<sup>34</sup> *Ibid.*, p. 276.

<sup>35</sup> *Ibid.*

<sup>36</sup> G. Zago, *Profilo biografico*, in Id. (ed.), *Il pensiero pedagogico di Giovanni Marchesini e la crisi del positivismo italiano*, cit., pp. 279-284.

ragionata *Bibliografia delle opere citate e degli scritti di interesse pedagogico di Giovanni Marchesini*<sup>37</sup> a cura di Carla Callegari che, per una bibliografia completa degli scritti di Marchesini, rinvia altresì ai meno recenti ma sempre validi lavori di Ludovico Limentani e Mario Quaranta apparsi rispettivamente su «Rivista pedagogica» e su «Rivista critica di storia della filosofia»<sup>38</sup>.

<sup>37</sup> C. Callegari (ed.), *Bibliografia delle opere citate e degli scritti di interesse pedagogico di Giovanni Marchesini*, *ibid.*, pp. 285-293.

<sup>38</sup> L. Limentani, *Bibliografia degli scritti di Giovanni Marchesini*, «Rivista pedagogica», vol. XXV, n. 1, 1932, pp. 17-30 e M. Quaranta, *Sul pensiero di Giovanni Marchesini (1868-1931)*, «Rivista critica di storia della filosofia», vol. XXXVII, n. 4, 1982, pp. 465-500.



## *Forum / Discussioni*



# Building a better society through textbook research. The mission of the Georg Eckert Institute from the beginning up to the present day\*

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**ABSTRACT:** For all the scholars in the field of textbook studies the Georg Eckert Institute is a very important point of reference. In fact, it is one of best known institutions devoted to research on textbooks and educational media. The Georg Eckert Institute (hereafter GEI) is a non-university academic centre, recognised at international level. GEI's mission is to promote a better understanding of the past in nowadays society through the development and dissemination of research on textbooks and teaching materials, related to different countries and periods. In this direction, the Institute carries on a double mission, according to the heritage of its instigator, the Braunschweig historian Georg Eckert. On one hand, GEI proposes recommendations to policymakers and educational practitioners on how textbooks might be used to deal with the complexity of our society. On the other, GEI promotes multidisciplinary and transnational research activities on textbooks and educational media, with the purpose to explore their diverse meanings and uses in the past as well as today. This article aims to reconstruct GEI's history and its actual mission, drawn up to academic literature and official documents. Particular attentions will be paid to GEI's research tools and facilities, as well as on the projects supported by the Institute in recent years.

**EET/TEE KEYWORDS:** Research centre; Textbook studies; Textbook history; Germany, XIX-XX<sup>th</sup> Centuries.

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## Introduction

Textbooks contain the information that a society wishes to pass on to its next generation; their contents are a result of social consensus and frequently find themselves a political issue. Textbooks can stir up antagonism, but they can also help to deconstruct stereotypes and images of 'the enemy', as well as helping to promote respect and understanding for other people<sup>1</sup>.

This is the premise of the editorial of the presentation booklet by the Georg Eckert Institute (hereafter GEI) in Braunschweig. In these words we can find GEI core mission, that is contributing to the building of a peaceful and responsible society through a better understanding of the past. Textbooks are protagonists of school life and the academic literature on textbooks has demonstrated that this teaching/learning tools often present stereotypes, prejudices and 'images of the enemy', that reveal the conflicts within or between societies and nations. From this assumption GEI, namely the only institute for textbooks research with an effective international scope, has developed its project. This Centre promotes research on textbooks from different countries and periods, adopting a cultural and historical perspective of study, in order to offer a contribution to develop a society based on the cooperation and the respect of other cultures and traditions. In this perspective, GEI intends to continue the work conducted by Georg Eckert, the Braunschweig-based historian to whom the Institute is dedicated. On 7<sup>th</sup> December 2015, GEI celebrated its first forty years, but its origins came from a long previous path, linked to the name and work of George Eckert<sup>2</sup>.

This paper aims to propose a brief profile of GEI. The first paragraph presents the origins of GEI and its projects, focusing on the life and activities of Georg Eckert and his heritage. The second paragraph points out the Institute research structures and the current research lines promoted by GEI. The last part is devoted to the Institute's research tools and in particular we talk about GEI's library, digital research tools and publications.

<sup>1</sup> *The George Eckert Institute for International textbook Research*, Braunschweig, [before September 2015], p. 6.

<sup>2</sup> On 7<sup>th</sup> December 2015, GEI celebrated its first forty years with an anniversary event, to which important authorities, such as the Lower Saxony Minister for Science and Culture Gabriele Heinen-Kljajić, the Vice President of Leibniz Association Knowledge Media Research Centre Friedrich W. Hesse and the former President of UNESCO German Commission Walter Hirche, took part. The event was closed with a round table on the topic *Textbooks: expectations – findings – developments*. Doing the honours, GEI's Director Eckhardt Fuchs. During this initiative the book edited by Eckhardt Fuchs, Steffen Sammler and Kathrin Henne, *Schulbücher zwischen Tradition und Innovation. Ein Streifzug durch die Geschichte des Georg-Eckert-Instituts*, Braunschweig, Georg-Eckert Institut, 2015 was presented. I would like to thank the authors for having allowed me to read their work in preview. English version of this book was published in January 2016.



### 1. From the *International Institute for Textbook Improvement* to the *Georg Eckert Institute for International Textbook Research*

The Georg Eckert Institute follows the path traced by the personage it is named after: Georg Eckert. This historian was born in Berlin in 1912. He studied history, geography and ethnology at Berlin University and received his PhD at Bonn University. Member of the Socialist German Workers' Youth (SDAJ) and, later on, of the Social Democratic Party of Germany (SPD), during the university period he joined the Nazi Party to disguise his socialist position. Recruited in the Wehrmacht during the Second World War, he was embarked into a navy directed to Greece. Here he established contacts with Greek partisans. In 1945, he ended the war experience and surrendered to British military. From 1946 to 1974, year of his death, Georg Eckert was Professor of 'History and Methods of History Teaching' at the Technical University of Braunschweig. As lecturer and then as professor (from 1952), Eckert developed history lessons oriented towards social and economical history. This approach was unusual in Germany, as the cultural perspective prevailed in historical studies at that time. In his *Material for History Lessons*, printed for the first time in 1947, Georg Eckert dealt with topics never included before in German Universities, such as *The Peasants' revolt*, *The Revolution of 1848/49* and *The Pre-march Era*. His lessons gave a great contribution to the foundation of the journal «Archive for Social History» and were structured in a way able to stimulate students' critical thinking. According to Eckert, the principle objective of history had to be teaching people to build up their own and independent opinions. From this belief derived his attention to history textbooks, which he considered a fundamental medium in the education of youth generations. He thought that there was an important mission to fulfil in order to create a democratic and open-mind society, that of eliminating from textbooks all the elements of hostility and antagonism, which had had and would have had a relevant role in blocking the development of the collaboration and interchanges between countries<sup>3</sup>.

As underlined by Verena Radkau, Georg Eckert concentrated all «his efforts to improve international understanding through textbook study and history teaching» and a very important date for his work is represented by 1951<sup>4</sup>. In

<sup>3</sup> For a first introduction to George Eckert biography see: R. Riemenschneider, *Georg Eckert und das internationale Schulbuchinstitut in Braunschweig*, in *Die Rückkehr der deutschen Geschichtswissenschaft in die «Ökumene der Historiker»*, München, Oldenbourg Verlag, 2008, pp. 115-131; Georg Eckert (1912-1974). *Geschichtspräsident, Institutsleiter*, in R. Bein (ed.), *Braunschweiger Persönlichkeiten des 20. Jahrhunderts*, Braunschweig, Döring, 2012, pp. 60-63; H.C. Mätzing, *Georg Eckert und die Anfänge des Archivs für Sozialgeschichte*, in *50 Jahre Archiv für Sozialgeschichte*, Bonn, Friedrich-Ebert-Stiftung, Gesprächskreis Geschichte, 2011, pp. 24-29; Ead., *Wissenschaftler und Botschafter der Völkerverständigung: Georg Eckert (1912-1974) zum 100. Geburtstag*, Bonn, Friedrich-Ebert-Stiftung, Archiv der Sozialen Demokratie, 2013.

<sup>4</sup> V. Radkau, *Tilting windmills. The work of the Georg Eckert Institute for International*

this year, during an international meeting on teaching History in Braunschweig, the *International Institute for Textbook Improvement*, later known as the *International Institute for Textbook* (1953) was founded<sup>5</sup>. In this regard, Michael Cahn has properly observed that the Institute «original name indicates more effectively the work which is pursued there. In the German post-war era, one of its primary aims was the comparative study of textbooks for geography and history in an attempt to reach a standard of national schoolbooks which would be conducive to international peace»<sup>6</sup>. Promoting international peace education through textbooks: this was the main task of the *International Institute for Textbook* founded by Georg Eckert.

This Institute constituted the first base for Eckert's working vision. The Institute soon started to collect history and geography textbooks from different countries and promote textbook conferences, devoted in particular to states which were previously enemies. Over the years, Georg Eckert and his Institute, with the support of the United Nations Educational, Scientific and Cultural Organization (UNESCO), organized more than 100 bilateral and multilateral conferences devoted to scholars and teachers and aimed to stimulate the reflection on the representation of 'the other' into textbooks. These conferences contributed to create long-lasting bases for reconciliations between former enemy states, first of all between Germany and its neighbours, such as France and, after 1972, Poland. Bit by bit, the countries involved in the conferences grew, including partners coming from all over the world. The conferences produced several textbook recommendations with practical applications to implement textbook revision. This was the case of the *Franco-German Agreement on Controversial Problems of European History* (1951)

*Textbook Research*, in L. Sercu (ed.), *National helpdesks for intercultural learning materials. A Guideline*, Utrecht, Parel, 1999, p. 49 and, for a first overview on GEI's origins, pp. 49-51. Of the same author also see: V. Radkau, *Los estudios del "Istituto Georg Eckert para la Investigación Internacional sobre Libro de Texto"*, «Didáctica de las ciencias experimentales y sociales», 1996, 10, pp. 3-8. A brief profile of the GEI is proposed in: S. Bachmann, *L'analyse comparative des manuels. Un «art pragmatique» au service de l'éducation internationale*, «Education et culture. Revue du Conseil de la coopération culturelle», vol. 31, 1976, pp. 33-36; W. Mertinet, *Strategies, concepts and methods of international history textbook revision: a German share in Education for internal understanding*, «International Journal of Political Education», vol. 2, 1979, pp. 101-114; M. Chan, *Georg Eckert Institute for International Textbook research*, «Paradigm», vol. 14, September 1994, pp. 56-57. See also the presentation entitled *Georg Eckert Institut für internationale Schulbuchforschung. Geschichte – Gegenwart – Zukunft*, available in GEI website: <<http://www.gei.de/fileadmin/gei.de/pdf/institut/gei-geschichte-gegenwart-zukunft.pdf>>. A comprehensive vision of GEI's role in international textbook research from the foundation until the end of 20<sup>th</sup> century is proposed in the articles gathered in: U. A.J. Becher, R. Riemenschneider (Hrsg.), *Internationale Verständigung. 25 Jahre Georg-Eckert-Institut für international Schulbuchforschung in Braunschweig*, Hannover, Verlag Hahnsche Buchhandlung, 2000.

<sup>5</sup> Radkau, *Los estudios del Instituto Georg Eckert*, cit., pp. 3-4.

<sup>6</sup> Chan, *Georg Eckert Institute for International Textbook research*, cit., pp. 56-57.

and *Recommendations for Textbooks of History and Geography of the Federal Republic of Germany and the People's Republic of Poland* (1975)<sup>7</sup>.

Thanks to his intense work, in 1964 Eckert was nominated president of the German UNESCO Commission. The following year, the *International Institute for Textbook* became the Information and Documentation Centre for the improvement of history and geography textbooks of the Council of Europe. This important milestone implied the crucial question of textbook production for the building of a common or at least shared European history. A very hard task that still now doesn't seem to be completely achieved<sup>8</sup>. In the early 1970s, the prospective of dialogues on textbooks was further enlarged. In fact, between 1971-1974, when Georg Eckert was still alive, his Institute, in collaboration with UNESCO, worked to improve the dissemination of a comparative approach in textbook studies, promoting a series of international textbook consultations not only in Europe, but also in Latin America and Africa<sup>9</sup>. In this direction, a relevant landmark was constituted by the *Recommendation concerning education for international understanding, co-operation and peace and education relating to human rights and fundamental freedoms*, adopted by UNESCO General Conference at its 18<sup>th</sup> session (Paris, 19<sup>th</sup> November 1974). «This document – as Falk Pingel has underlined – underscores the importance of universal values and puts forward practical proposals for the production and dissemination of educational material designed to impart attitudes, not mere knowledge, into students in order to enable the learners to evaluate information»<sup>10</sup>.

<sup>7</sup> The first Franco-German textbook meeting was in 1935 and its forty recommendations were the basis for the new recommendations of 1951 (see the following note). Instead, the German-Polish Joint Textbook Commission took up its work in 1972. For an overall panorama in this regard, see: Mertinet, *Strategies, concepts and methods of international history textbook revision*, cit., pp. 101-114; Bachmann, *L'analyse comparative des manuels*, cit., p. 34; E. Fuchs, *The Georg Eckert Institute for International Textbook: research and the development of bilateral history textbooks*, in *Di 7 jie li shi ren zhi yu dong ya he ping lun tan: Dong ya guo ji guan xi de bian hua yu li shi ren shi*, 2008, 11, 6-9, [Beijing], Beijing Shi, She hui ke xue wen xian chu ban she, 2008, pp. 78-81. For a reconstruction of the first steps of the post-war international textbook revision in Europe: R. Faure, *Connections in the History of Textbook Revision, 1947-1952*, «Education Inquiry», 2, 2011, 1, pp. 21-35. For information on the projects carried on by the *German-French Textbook Commission* and *German-Polish Textbook Commission* see Georg Eckert Institute's website, respectively, at the following pages: <<http://www.gei.de/en/projects/completed-projects/bilateral-textbook-commissions-and-projects/german-french-textbook-commission.html>>; <<http://www.gei.de/en/departments/europe-narratives-images-spaces/europe-and-the-national-factor/german-polish-textbook-commission.html>>. An interesting overview on Textbook Commissions promoted by the *International Institute for Textbook* in and out Europe is proposed by Fuchs, Sammler, *Schulbücher Zwischen Tradition und Innovation*, cit., pp. 6-9.

<sup>8</sup> Cf. Mertinet, *Strategies, concepts and methods of international history textbook revision*, cit., pp. 107-108; Bachmann, *L'analyse comparative des manuels*, cit., pp. 33-36.

<sup>9</sup> Cf. Mertinet, *Strategies, concepts and methods of international history textbook revision*, cit., pp. 109-110; Fuchs, Sammler, *Schulbücher zwischen Tradition und Innovation*, cit., p. 8.

<sup>10</sup> F. Pingel, *UNESCO Guidebook on Textbook Research and Textbook Revision. 2<sup>nd</sup> revised*

Textbook matter and the teaching of history for a better comprehension of peoples are certainly the *file rouge* of Georg Eckert's life and that of his Institute. Eckert was a key figure in textbook revision process after the Second World War. During his life he received many recognitions of national and international level, among which we can mention the German Federal Cross of Merit in 1972. He died in Braunschweig two years later (7<sup>th</sup> January 1974), but his heritage was kept and exploited by his Institute, which was renamed *Georg Eckert Institute for International Textbook Research* (GEI).

GEI was established officially on 26<sup>th</sup> June 1975. On this date, the Lower Saxony State Parliament established GEI as an independent «institution of public law» with a financial capacity. Right after, Lower Saxony asked to all federal states of West Germany to support GEI. All the states accepted the invitation with the exception of Bavaria and Baden-Wuerttemberg. GEI's governing board was divided in an Academic advisory Board, formed by independent scholars, representing the school subjects and the corresponding didactics studied by GEI, and a Board of Trustees, constituted by representatives of the German Bundesländer, the Ministry of Foreign Office, the Federal Ministry of Education and Science, the German UNESCO Commission and the University of Braunschweig<sup>11</sup>.

The new Institute came to light with an ambitious project, well-explained in the article 2 of its *Founding Act*:

1. To compare, through international textbook research, historical, political, and geographical presentations of the Federal Republic of Germany and those of other countries, and to submit recommendations for making them more objective;
2. To organise international meetings of experts aiming at examining and revising textbooks;
3. To advise authors, editors and publishers of textbooks;
4. To prepare expert comments and to support research work;

and updated edition, Paris, Braunschweig, United Nations Educational, Scientific and Cultural Organization, Georg Eckert Institute for international textbook research, 2010, p. 13.

<sup>11</sup> The foundation of the Georg Eckert Institute is reconstructed in: R. Wenstedt, *Die Gründung des Georg-Eckert-Instituts für internationale Schulbuchforschung aus politischer und parlamentarischer Sicht*, in Becher, Riemenschneider (Hrsg.), *Internationale Verständigung. 25 Jahre Georg-Eckert-Institut für internationale Schulbuchforschung in Braunschweig*, cit., pp. 124-128; E. Fuchs, S. Sammler, *Establishment of the Georg Eckert Institute. How textbook Research was given a new Future in Braunschweig. Following the death of Georg Eckert*, «Eckert. Bulletin», vol. 2015, n. 1, pp. 33-35 (p. 33 for the quotation). I thank the authors to allow me to read the draft version of their article. About GEI's origins, see also: Mertinet, *Strategies, concepts and methods of international history textbook revision*, cit., p. 36; Radkau, *Tilting windmills. The work of the Georg Eckert Institute for International Textbook Research*, cit., p. 49; Ead., *Los estudios del "Istituto Georg Eckert para la Investigación Internacional sobre Libro de Texto"*, cit., p. 4; U. Becher, *International Textbook Research as Performed the Georg Eckert Institute. Its tasks and Developments*, in *A Role of Social Studies Education for the Promotion of Mutual Understanding between Korea and Germany*, Korea Educational Development Institute, 1994, p. 4.

5. To impart to the public its scientific findings and practical experiences through publications and lectures<sup>12</sup>.

These objectives show how in GEI's mission the historical, social and political aspects are strictly intertwined. This particularity has remained GEI's distinctive feature in its forty years of history, despite the inevitable changes occurred over time<sup>13</sup>.

In 1981, the Institute obtained a wonderful late-classical location at the Villa von Bülow in Braunschweig. The 1980s were very intensive years for GEI. The Institute continued the previous contacts, established by George Eckert (for e.g. with Poland and the USA) and established new ones, with the Soviet Union and Israel. In this last regard, it is noteworthy to recall that in 1985 German and Israel scholars produced the *German-Israeli Textbook Recommendations* and that, precisely in this year, GEI was awarded the UNESCO Prize for Peace Education<sup>14</sup>. A very relevant turning point was also represented by the conference organized with UNESCO in 1988, which constituted the premise for *UNESCO Guidelines for Curriculum and Textbook Development in International Education* and for the establishment of UNESCO International Textbook Research Network, based in GEI<sup>15</sup>.

<sup>12</sup> In this regard: Radkau, *Tilting windmills*, cit., p. 49; Ead., *Los estudios del "Istituto Georg Eckert para la Investigación Internacional sobre Libro de Texto"*, cit., p. 4; Becher, *International Textbook Research as Performed the Georg Eckert Institute*, cit., p. 5. The complete text of Founding Act is available in: Wenstedt, *Die Gründung des Georg-Eckert-Instituts*, cit., p. 126.

<sup>13</sup> During the period 1975-1978, GEI precised its government structures as it is explained by C. Hodler, *Die Gründungsphase des Georg-Eckert-Instituts von 1974 bis 1978*, in Becher, Riemenschneider (Hrsg.), *Internationale Verständigung. 25 Jahre Georg-Eckert-Institut*, cit., pp. 128-132. We just recall the sequence of GEI's directors and deputy directors after 1978. The role of GEI's Director was held by: Siegfried Bachmann (Acting Director, September 1977 - April 1978), Wolfgang Jacobmeyer (Acting Director, Mai 1978 - September 1978), Karl-Ernst Jeismann (October 1978 - September 1984), Ernst Hinrichs (October 1984 - September 1992), Ursula Becher (October 1992 - September 2000), Wolfgang Höpken (October 2000 - September 2005), Falk Pingel (Acting Director October 2005 - September 2006), Simone Lässig (October 2006 - September 2015). The role of GEI's Deputy was held by: Wolfgang Jacobmeyer (May 1978 - March 1991), Wolfgang Höpken (September 1991 - September 1993), Falk Pingel (October 1993 - May 2009) and Eckhardt Fuchs (June 2009 - September 2015). Currently, Eckhardt Fuchs is GEI's Director and Sandra Mass is GEI's Deputy Director. For a general overview on this issue: <<http://www.gei.de/en/the-institute/history/directors.html>>. Instead, a chronology of the Presidents of the Board of Trustees and the Academic Advisory Board is proposed in Fuchs, Sammler, *Schulbücher zwischen Tradition und Innovation*, cit., p. 27.

<sup>14</sup> Cf. *Georg Eckert Institut für Internationale Schulbuchforschung. Geschichte – Gegenwart – Zukunft*, cit., p. 4.

<sup>15</sup> In fact, in the *Preface* of the *Guidelines* we read: «In 1988, an *International Consultation with a view to recommending criteria for improving the study of major problems of mankind and their presentation in school curricula and textbooks* was organized by UNESCO and the German Commission for UNESCO in Braunschweig. One of its recommendations was to assist Member States in the development of curricula and textbooks on major world issues. As a follow-up to this Consultation, in 1991 an International Expert Meeting was held in Brisbane, Australia, to define and elaborate criteria for improving curricula, textbooks and other educational

In the 1990s, the end of the Cold War implicated new challenges for GEI. The question of boundaries had acquired a new light, topics as the multicultural pluralism, the European identity(ies) and integration in textbooks became increasingly important. The conflicts in the Balkans and in some post-Soviet states had given renewed strength to the theme of peace education through textbooks. And yet, the globalization process, the dynamicity of cultural changes, the growing role of digital educational media required textbooks to interpret their task of cultural mediation in a new way<sup>16</sup>. These are just some examples of the diverse external inputs which in the last two decades brought GEI to «re-orient» its tasks<sup>17</sup>.

Nowadays, the Institute's main purpose is not the textbook revision but the enhancement of the interrelations between research, society and policy. The reference to the enemy in the current textbooks are – in many cases – less explicit than in the past and, actually, the challenge consists in reading between the lines, to identify prejudices and stereotypes not only in the texts but also in the paratexts (titles, preface, illustrations, notes, etc.). Thus, GEI's research activities privilege the multidisciplinary (historians, geographers, social scientists, linguists and teachers) and thematic approach (for e.g. European integration, multiculturalism, human rights, transnational education, etc.). A relevant example of this new research direction is constituted by the report *International Status of Education on the Holocaust*, appeared in November 2014, which represents the culminant point of one of GEI's central research subject since 1960s. From 2012 to 2014 GEI, in collaboration with UNESCO, has investigated the narratives of Holocaust in secondary-school level history and social studies curricula and textbooks from different countries of all continents. The report shows how «one of the main trends worldwide is domestication [of Holocaust], a process whereby countries place emphasis on the local significance of the event or appropriate them in the interests of local

materials. Two of the main recommendations of this meeting invited UNESCO to establish international, regional and national networks to promote research on the international dimension in educational curricula, textbooks and educational materials (this recommendation resulted in creation of the UNESCO International Textbook Research Network with the Georg Eckert institute for International Textbook Research), and to prepare Guidelines and Criteria for the revision of curricula and textbook, *These Guidelines for Curriculum and Textbook Development in International Education*, are the direct result of these efforts sustained over many years». UNESCO, *Guidelines and Criteria for the Development, Evaluation and Revision of Curricula, Textbooks and other Educational Materials in International Education in Order to Promote an International Dimension in Education*, Braunschweig, 1988 and Brisbane 1991, p. 3. In this regard see also: Pingel, *UNESCO Guidebook on Textbook Research and Textbook Revision*, cit., pp. 13-14, 64.

<sup>16</sup> Interesting reflections on the situation of textbook studies after 1989 are proposed in Fuchs, Sammler, *Schulbücher Zwischen Tradition und Innovation*, cit., pp. 10-11.

<sup>17</sup> GEI's current priorities are effectively listed in the last paragraph (*Neuorientierungen*) of the article *Georg Eckert Institut für internationale Schulbuchforschung. Geschichte – Gegenwart – Zukunft*, cit., p. 4.

populations». Report's findings serve not only as a reference guide for teachers, textbooks authors and policymakers, but they are also an understanding tool for academics, because they clearly demonstrate the differences and overlapping in the treatment of this subject applied to different cultures<sup>18</sup>.

Despite the enlargement of its interests, GEI has continued to support bilateral projects between countries in conflict, such as South-Korea, China and Japan or Israel and Palestine<sup>19</sup>. In this regard, we can mention the cooperation of GEI in the development of the bi-national textbook on the history of the Middle East conflict in 2003<sup>20</sup>, and in support the joint Chinese-Japanese-Korean history textbook in 2008<sup>21</sup>. At the same time, GEI – as we will show in the next paragraph – has continued to work on textbook recommendations, with the purpose to offer guidelines to textbook authors, teachers and publishers in order to better 'interpret' the key role of textbooks in propagating the culture of peace and intercultural understanding at the new generations.

From 2011, GEI is member of the Leibniz Association, «one of the largest German research association with 88 national member institutes»<sup>22</sup>, and

<sup>18</sup> The project is based on 272 currently valid curricula from 135 countries, and on 89 textbooks published in 26 countries since 2000. Peter Carrier (principal investigator), Eckhardt Fuchs (project leader) and Torben Messinger (project coordinator) were authors of the report *The International Status of education about the Holocaust. A global mapping of textbooks and curricula*, Paris, Braunschweig, United Nations Educational, Scientific and Cultural Organization (UNESCO), Georg Eckert Institute for International Textbook Research, 2015 (p. 3 for quotation). A presentation of the report has been written by P. Carrier, *The Holocaust in textbooks and curricula*, «Eckert. Bulletin», 2014, pp. 51-53.

<sup>19</sup> From the Second World War period until now, the approach to international textbook revisions has been changing very much both on the side of methodology and on the side of objectives. On this aspect see Pingel, *UNESCO Guidebook on Textbook Research and Textbook Revision*, cit., pp. 19-26.

<sup>20</sup> The textbook was realized within the project promoted by the PRIME Institute (Peace Research Institute in the Middle East). «The book was intended to be used in schools on both sides of the Armistice line of 1967 (Green Line)», but since 2010 has been banned both in Israel and Palestine. For further information on PRIME project see and for the PRIME book: <<http://www.gei.de/en/projects/completed-projects/schulbuchprojek-israel-palestina.html>>.

<sup>21</sup> See the declarations by Eckhardt Fuchs during the conference held in Begin in 2008 to present the textbook Fuchs, *The Georg Eckert Institute for International Textbook*, cit., p. 78. On the project of this 'transnational textbook' see also Pingel, *UNESCO Guidebook on Textbook Research and Textbook Revision*, cit., pp. 59-62.

<sup>22</sup> The Leibniz Association (hereafter LA) brings together 86 academic institutions and research museums focused on different science fields, from natural, engineering and environmental sciences to economics, spatial sciences, up to social, educational and historical sciences. LA includes 16,500 individuals, out of whom 7,700 are academics and researchers. LA's institutes conduct knowledge-based researches and communicate their results to different target groups (policymakers, academia, business world, general public). LA's institutes are funded by the German federal government and the individual German states. See the LA website: <<http://www.leibniz-gemeinschaft.de/en/>>.

at present – by virtue of its increasing international contacts, projects and research materials – it can propose itself as «a unique interdisciplinary centre of competence in international textbook research and textbook projects»<sup>23</sup>.

## 2. Research structures and projects

GEI's mission consists in exploring textbooks and other educational media from a cultural and historical point of view<sup>24</sup>. Starting from the evidence that textbooks contain an overall representation of the contents that a society intends to transmit to the new generations, GEI's research activities are focused on the development of a critical, trans-disciplinary and application-oriented analysis of textbooks. GEI's research activities are related to the following disciplines and school subjects: history, geography, social studies, ethics and religious studies. The current research topics of GEI concern: the representations of Europe, the relationship between educational media, religion and globalisation, the construction of the self and the other, the processes of cultural translation, the practices of memory applied in educational media and the image of crisis and conflict depicted in textbooks. GEI also promotes the methodological and theoretical reflection on textbook studies and, in recent years, it is also carrying on studies on the use and impact of textbooks in school life (how do teachers use textbooks? How do pupils interact with them?).

About GEI's internal structures, we can observe that there are two main typologies of research infrastructures: the Departments and the Research Forums. As regards the latter, we can affirm that GEI's Forums were born from the necessity to go beyond the individual projects carried on by the numerous academics who work in the Institute. Thus, the Research Forums are a sort of internal network of discussion, finalized to improve research, reflecting on four relevant topics: *Memory cultures and memory practices* (RF 1), *Digital educational media research* (RF 2), *Historical research* (RF 3) and *Didactics* (RF 4). Actually, Forums' topics reflect the principle cores of GEI's textbook research activities: memory and culture, digital humanities, historiographical reflection and didactical application. As regards GEI's Departments, we can consider them as a sort of catalysts of internal and external research projects and initiatives. Currently, GEI has got four main departments: 1. *Textbooks and Society*, 2. *Europe. Narrative, Images, Spaces*, 3. *Textbooks as Media*, 3. *Digital Information and Research Infrastructure*. We think it is important

<sup>23</sup> Fuchs, Sammler, *The establishment of the Georg Eckert Institute*, cit., p. 35.

<sup>24</sup> This research perspective is ratified by Art. 2 of the New Act of the Institute published on 19<sup>th</sup> June 2013. The text of the New Act can be read in Fuchs, Sammler, *Schulbücher Zwischen Tradition und Innovation*, cit., p. 28.



to deepen the discourse on the departments in order to better understand the current research priorities of GEL.

The *Department Textbooks and Society* has the purpose to investigate «the diverse range of interactions that take place between educational media and social change»<sup>25</sup>. The Department has got three sub-areas focused on: ‘peace and conflict’, ‘religion and diversity’, ‘textbook production’. At present, each one is represented by two or three different projects.

The ‘oldest’ project among the current ones related to the first sub-area is the project *History textbooks and teaching in Albanian Language Areas*, which is a prosecution of a previous project (*Textbook and Curriculum Development in South Eastern Europe*) carried on between 2010 and 2013. The project, which ends in this year, had the purpose to provide discussion opportunities (conferences and workshops) and stimulate researches (also with fellowships) on the Albanian-language history textbooks and curricula. The project involved a large geographical area, which included not only Albania, but also the diverse Albania-speaking areas of former Yugoslavia: Kosovo, Macedonia, Montenegro and Southern Serbia<sup>26</sup>. A different perspective on the topic ‘peace and conflict’ is proposed in the project *Education Policy following Mass Crimes*. Focusing on the case study of Guatemala, this three-year research project (2014-2017) aims to study the issue of transitional justice and peace education in textbooks and educational practices through a historical and sociological approach<sup>27</sup>. Finally, *The critical geopolitics of environmental change and conflict in school textbooks* project has the objective to study the connections between environmental change and conflict in school textbooks and classroom in the next three years (2015-2017), paying particular attention to the ‘Global North’ nations and applying a mixed analysis method, in which geopolitical theory and content-visual analysis are combined<sup>28</sup>.

The sub-area ‘religion and diversity’ is exploited in one individual research project and two multidisciplinary research teams. As regards the first one (*Between transnational education policy, pluralisation and individualisation of religion: religion in ethics education in Germany and Switzerland*), we find a double level of analysis, transnational and national, through which the issue of religious plurality and individualism in nowadays societies is dealt with.

<sup>25</sup> The quotation is taken by Department’s presentation webpage: <<http://www.gei.de/en/departments/textbooks-and-society.html>>.

<sup>26</sup> The project was funded by German Federal Foreign Office, covered the period 2013-2015 and was coordinated by Claudia Lichnofsky. For further information see the project website: <<https://albanianlanguage textbooks.wordpress.com/>>.

<sup>27</sup> The project is carried on by Jakob Kirchheimer. For a general presentation of the project see the webpage: <<http://www.gei.de/en/departments/textbooks-and-society/education-policy-following-mass-crimes.html>>.

<sup>28</sup> This project has been designed by Tobias Die. For an overall idea on this research, see the project webpage: <<http://www.gei.de/en/departments/textbooks-and-society/the-critical-geopolitics-of-environmental-change-and-conflict-in-school-textbooks.html>>.

On the hand of transnational level, the project intends to focus on decisions and recommendations by UNESCO, OSCE and the Council of Europe correlated to religious issues. On the other hand (national level), the project will examine textbooks for ethics education used in German federal states of Brandenburg and Bavaria and in the Swiss canton of Zurich<sup>29</sup>. *Innovation through tradition? Approaching cultural transformations during the Sattelzeit via Jewish educational media*: this is the suggestive title of the German-Israeli cooperative project headed by Simone Lässig (GEI's former director) and Zohar Shavit (Tel Aviv University). The project's purpose is to explore the links between innovation and tradition during the Sattelzeit (an important historical period for Central European Jewry, which went from the late 18<sup>th</sup> and the 19<sup>th</sup> centuries), considering educational media, such as readers, anthologies, devotional works and sermons<sup>30</sup>. The other research team project is *Nuances. Teaching materials for classroom diversity*. This project starts from the desire to fill the gap detected in school textbooks with *ad hoc* educational material devoted to secondary school students. The project is based on a multimedia platform, in which you can find diverse materials, related to different matters (history, political studies, religious studies, ethics and geography), developed to stimulate students' critical thinking in front of the diverse nuances of our society. A special core area of the project is related to the Muslim world and explores the migrant backgrounds from a historical and current point of view<sup>31</sup>.

The sub-area 'textbook production' is the background of two projects related to German context. The project *New knowledge in new media? Teaching social studies and the challenges of medial change and an increasingly open society during the Twentieth century* aims to examine the knowledge production processes in different educational media (textbooks, educational films and television), focusing on the humanities and social sciences (history, geography, civics, political science) and two specific periods of social transformations: the free State of Braunschweig during the Weimar Republic and the Federal State of Lower Saxony in the 1960s and 1970s<sup>32</sup>. The project *Politics of the*

<sup>29</sup> The project will be developed between 2015-2017 by Zeinka Stimac. A detailed project's overview is available on the webpage: <<http://www.gei.de/en/departments/textbooks-and-society/between-transnational-education-policy-pluralisation-and-individualisation-of-religion-religion-in-ethics-education-in-germany-and-switzerland.html>>.

<sup>30</sup> Started in 2013, the project is funded by the German Research Foundation (DFG) and has a specific website, where there is a rich bibliography and an overall description of the diverse research lines developed into the project: <<http://jbm.gei.de/>>.

<sup>31</sup> The project started in 2013, is funded by the Robert Bosch Foundation and is provided by a well-qualified advisory board. The educational materials are in German and are available on the project website: <<http://www.zwischentoene.info/themen.html>>.

<sup>32</sup> The project will start in the next year and will go on until 2017. The project is founded by Lower Saxony Ministry for Science and Culture and intends to involve different stakeholders: policy makers, teachers, publishers and academics. For a general introduction to this project, see: <<http://www.gei.de/en/departments/textbooks-and-society/new-knowledge-in-new-media-teaching-social-studies-and-the-challenges-of-medial-change-and-an-increasingly-open-society->

*future through education? The genealogy of technical and scientific textbooks knowledge in Germany (1870-1980)* intends to examine the scientific and technical knowledge in German textbooks published in 1870-1880, showing the political, ideological and technical relevance of technical and scientific education for society's identity<sup>33</sup>.

The *Department of Textbooks as Media* conducts researches on «textbooks and educational media used in schools and systematically examines them in their mediality», adopting a theoretical and empirical approach<sup>34</sup>. The Department has got three research units: 'History, theories and methodologies of textbooks studies', 'Educational media change', 'Educational media reception'.

The first unit follows two main research lines. On one side, we find projects aiming to provide a map of the theoretical and methodological approaches in textbook research, such as the project *Handbook for textbook research* and the project *Theoretical and methodological challenges facing future research into education media*; this last one has a specific focus on digital educational media<sup>35</sup>. On the other side, we have projects which reflect more traditional fields of research, such as the project *History of the Georg Eckert Institute*, ended this year with the publication of the book *Schulbücher Zwischen Tradition und Innovation. Ein Streifzug durch die Geschichte des Georg-Eckert-Instituts*, which proposes – as the title itself announces – a travel in the history of the textbook research field, moving from GEI's history<sup>36</sup>.

The research unit 'Educational media change' is focused on the historical transformations produced by the educational media. The projects developed in these units concern different research fields and educational media. We have projects concentrated on educational films in the interwar period, which applied a comparative approach, such as the project *Educational films in the interwar period: Germany, France and Italy, a comparison*<sup>37</sup> and, in part but not entirely, the project *Influence of transnational education: on the relationship between the League of Nations and China during the interwar period*<sup>38</sup>. Notebooks

during-the-twentieth-century.html>.

<sup>33</sup> This project is coordinated by the head of Textbooks and Society Department Marcus Otto and started in 2015. For further information on the project's core idea: <<http://www.gei.de/en/departments/textbooks-and-society/politics-of-the-future-through-education.html>>.

<sup>34</sup> The quotation is taken from the Department's presentation webpage. From here, you can find information about the single project carried on in the Department: <<http://www.gei.de/en/departments/textbooks-as-media.html>>.

<sup>35</sup> These two projects are coordinated by Annkatrin Bock and will be completed by 2016. In this regard see: <<http://www.gei.de/en/departments/textbooks-as-media/theories/handbook-for-textbook-research.html>>, <<http://www.gei.de/en/departments/textbooks-as-media/methods/theoretische-und-methodische-herausforderungen-zukuenftiger-bildungsmedienforschung.html>>.

<sup>36</sup> Fuchs, Sammler, *Schulbücher zwischen Tradition und Innovation*, cit.

<sup>37</sup> The project *Educational films in the interwar period: Germany, France and Italy, a comparison* involves three scholars: Michael Annegarn-Gläss, Anne Bruch and Eckhardt Fuchs. This three-year project (2014-2017) is funded by the German Research Foundation (DFG).

<sup>38</sup> The project *Influence of transnational education: on the relationship between the League of*

and their technical, organisational and educational implications in classroom is the research object of the project *Digital teaching and learning notebooks in the classroom*. The scientific debate on educational media and their linguistic and ethnographic connotations is the core idea of the project *The discourse of edtech*<sup>39</sup>. Instead, the project *Innovative history education for All* involves a European consortium and works on one hand on the development of history teaching tools for the educational portal *Historiana* and on the other on the definition of educational policy recommendations for a good digital learning<sup>40</sup>.

The research unit 'Educational media reception' explores how the media, not only textbooks, are used in classroom. The shaping of collective memories, such as textbooks and curricula, in heterogeneous classrooms is the focus of *Memory practices: enacting and contesting the curriculum in contemporary classrooms*<sup>41</sup>. A comparative work on the teaching of Cold War in Germany, Sweden and Switzerland is the main purpose of *Teaching the Cold War* project<sup>42</sup>. Teachers' approaches to the narratives of the First World War is the analysis object of the project *Teaching the teachers: a multi-perspective approach to the First World War in the classroom*<sup>43</sup>. The topic of European identity is examined by two projects of 'Educational media reception' unit, but with a different approach. On one hand, the project *The European union in*

*Nations and China during the interwar period* aims to analyze the cooperation processes between the League of Nations and China, pointing out the main educational questions faced, the principal actors and results of this cooperation. A special attention will be paid to educational films, which – as it is known – was a topical peace tool used by the League of Nations together with other broadcasting media. This project is coordinated by Eckhardt Fuchs and Kaiyi Li.

<sup>39</sup> The project *Digital teaching and learning notebooks in the classroom* ends this year. It is a project funded by the Braunschweig Civic Foundation, which is coordinated by Annekatrin Bock, Maren Tribukait and Inga Niehaus. Instead the project *The discourse of Edtech* has started this year and will end in 2019. This institutional funding project is head by Felicitas Macgylchrist and involves two Universities (Leuven University and Gent University).

<sup>40</sup> The *Innovating History Education for All* project started last year and will be implemented during the next two years (2014-2017) by Euroclio in partnership with Webtic, Mount School York, the Educational Research Institute and the Georg Eckert Institute. It is a European project, funded in the Erasmus+ framework. For more information see Euroclio website: <<http://www.euroclio.eu/new/index.php/innovating-history-education-for-all>>.

<sup>41</sup> The project is funded by the Pact for Research and Innovation and consists of two main phases. The first one concerned the educational media production and was completed in 2009-2011, the second phase concerns the educational media use, was started in 2012 and will end in 2016. Project principal investigator is Felicitas Macgylchrist. For further information see Project website: <<http://memorypractices.org/research-group/>>.

<sup>42</sup> The partners of GEI in this project are: the Centre for History Teaching & Learning and Recalling the Past at the central Switzerland University of Teacher Education in Lucerne and the Educational History and History Education research group at Umeå University (Sweden). The institutional project website (at the present only in German) provides information on project's results, events and publications: <<http://teaching-the-cold-war.gei.de/>>.

<sup>43</sup> The principal investigators of this project are: Barbara Christophe and Kerstin Schwedes. Some information on project structures and purposes are on GEI's website: <<http://www.gei.de/en/departments/textbooks-as-media/teaching-the-teachers.html>>.

*German textbooks. A study on civic education* aims to study in which ways the issue of European Union is proposed in German textbooks in the last decades and how it is concretely taught in Lower Saxony schools<sup>44</sup>. On the other hand, the EU-financed COST-Network *Social Psychological dynamics of historical representations in the enlarged European Union* analyzes the issue of European identity adopting a multidisciplinary method (historical, psychological and sociological) and taking into consideration a wide range of countries<sup>45</sup>.

The *Department Europe. Narratives, Images, Spaces* aims to «provide a scientific basis and objective, constructive support for Europe as an issue in education by conducting analysis, promoting curriculum development and acting in a consultancy capacity»<sup>46</sup>. The Department has three areas of interest: ‘Europe and the national factor’, ‘Europe viewed through the prism of its regions’, ‘Europe: the global dimension’.

Most projects belonged to the first area of study and are promoted by Textbook commissions. As we mentioned above, since the 1950s GEI has coordinated Textbook Commissions, but their role has changed during the years. The traditional procedure of bi- and multilateral commissions is now followed just in part and has been substituted by working projects, based on workshops for the know-how transfer, the scientific cooperation and dialogue. Right now, GEI’s Textbook recommendations are not a way to favour the reconciliation between former enemy countries, but tools to enhance mutual understanding<sup>47</sup>. In this direction, we can just recall the intense activities of the bilateral working groups on history, geography and civic/social studies of the *German-Israeli Textbook Commission*, as well as the rich calendar of conferences promoted by the *German-Czech Textbook Commission* and, last but not least, the considerable findings reached by the *German-Polish Textbook Commission*, which provided recommendations to produce a series of history textbooks implemented in identical form in German and Polish secondary schools<sup>48</sup>. A unique vision on the topic ‘Europe and the national factor’ is proposed by the project *Visual history. Institutions and media of visual memory*. This network

<sup>44</sup> The project started in 2013 and will be completed by 2016. The project is funded by the Lower Saxon State and is based on the collaboration between GEI and Göttingen University. Other information are on GEI’s website: <<http://www.gei.de/en/departments/textbooks-as-media/methods/eu-didactics.html>>.

<sup>45</sup> GEI is one of the huge number of institutions involved in the project. Representatives from 31 different countries participate to this four-year project (2012-2014). For a panorama on project’s members and activities see the project website: <<http://costis1205.wix.com/home>>.

<sup>46</sup> The quotation is taken from the Department’s webpage: <<http://www.gei.de/en/departments/europe-narratives-images-spaces.html>>.

<sup>47</sup> *Georg Eckert Institut für internationale Schulbuchforschung. Geschichte – Gegenwart – Zukunft*, cit., pp. 4-5.

<sup>48</sup> The activities and projects carried on by the three *Textbook Commissions* are described in detail on GEI’s website and are available from the section devoted to *Department Europe. Narratives, Images, Spaces*: <<http://www.gei.de/en/departments/europe-narratives-images-spaces.html>>.

project aims to advance in visual history research, moving from the analysis of the images preserved in the specific collections of project partners. In particular, GEI by virtue of its rich German book collection will examine the image of Socialism in textbooks<sup>49</sup>.

For the research area 'Europe viewed through the prism of its regions' we have – at present – two projects, which approach the topic of the multiple identities of regions considering different points of view. The project carried on by GEI's Leibniz working group is focused on the issue of migration and education in Germany from 1945 to the present day. The project has a threefold objective: to reconstruct the debates on migration developed in Germany after 1945, to analyze the heterogeneity of migrants in Germany during the last decades and to explore the educational policies and practices relating to migration and immigration applied in schools. The particularity of the project, which started this year and will develop in the next three years, consists in the large range of sources considered: from classical sources such as textbooks and curricula to less used sources such as school yearbooks, professional journals, autobiographical memoirs, up to oral interviews<sup>50</sup>. The project *Upper Silesia and its cultural heritage – memory politics, education policy and didactic innovations* concerns a «traditional European border region», represented by Upper Silesia, and aims to estimate its role in the «politics of memory», focusing on the exam of Polish textbooks, curricula and educational programmes after 1989 and ending with a proposal of teaching modules relating to the Upper Silesia region as example of multicultural memory education<sup>51</sup>.

Currently, in the research area 'Europe: the global dimension' we have two projects which extend their research framework beyond Europe. One is the project *WorldViews. The world in textbooks* which, starting from the results achieved by *EurViews* project, aims to study how countries and regions use textbooks to locate themselves in the world, paid particular attention to the use of reference frames related to regions, nations, Europe and the world, in order

<sup>49</sup> The project *Visual history, Institutions and media of visual memory* started in 2012 and will end in 2016. In this project, funded by The Leibniz Association Joint initiative for Research and Innovation, GEI collaborates with other partners: the Centrum for Contemporary History, Herder Institute of Marburg and German Museum of Munich. It is interesting to notice that the project members have developed a platform (<https://www.visual-history.de/>) and a blog (<https://www.visual-history.de/visual-history-forschungsprojekte/>) to communicate and share information.

<sup>50</sup> The working group consists of one post-doctoral researcher (Stephanie Zloch) and three doctoral researchers (Matthias Springborn, Engin Deniz Yorulmaz and Cornelia Hagemann) and is funded by Leibniz Competition programme. For further information on the project: <<http://www.gei.de/en/departments/europe-narratives-images-spaces/europe-through-the-prism-of-its-regions/leibniz-working-group-on-migration-and-education-in-germany-since-1945.html>>.

<sup>51</sup> The quotations are taken from the project presentation page on GEI's website. The project *Upper Silesia and its cultural heritage* is part of the German programme for universities *Memory and Identity. The Germans and their Neighbours in Central and eastern Europe*. On the project outcomes see the project website (available only in German and Polish): <<http://www.oberschlesien-im-unterricht.net/index.php/de/>>.

to understand the identity-building processes inside and outside Europe<sup>52</sup>. The world also represents the background of the project *Children and their world*, which is focused on textbooks and books for children and young people, taken as main source to analyze the image of the world transmitted and produced for children and youth in 19<sup>th</sup> and 20<sup>th</sup> centuries<sup>53</sup>.

The *Department of Digital Information and Research Infrastructure* works in close collaboration with GEI's Library and the other departments, providing digital research infrastructures for textbook research. The Department focuses on the following fields: information technology infrastructures, digital information services and digital humanities. In this last field, the Department is participating as partner to the project *Clarín-D Working group on modern history*. The project, funded by the German Federal Ministry of Education and Research, involves several partners and aims to support Humanities and Social Sciences by providing a large variety of services for finding, accessing and managing research data<sup>54</sup>. This is just one example of the numerous projects carried on by the Department of Digital Information and Research Infrastructure, which are strictly linked to GEI's Library and research activities, as we will show in the next paragraph.

### 3. Infrastructures, publications and fellowship programmes

As research centre, GEI disposes of infrastructures to conduct and facilitate research both nationally and internationally. The *Library* constitutes the

<sup>52</sup> This three-year project (2015-2018) is funded by the Federal Ministry of Education and Research and moves from the close collaboration between the *Department Europe. Narratives, Images, Spaces* and the *Department of Digital information and research infrastructure*. As the project *EurViews*, the project *Worldviews* aims to develop an online platform, but with the purpose to integrate it with the other digital infrastructures of GEI. An overall presentation of the project is proposed on GEI's website: <<http://www.gei.de/en/departments/europe-narratives-images-spaces/trans-europe-external-borders/worldviews-the-world-in-textbooks.html>>.

<sup>53</sup> The project *Children and the world* started in 2014 and is funded by the Leibniz Competition. In this project GEI works with other partners: the Library of the University of Braunschweig, the University of Zürich, the Göttingen Centre for Digital Humanities and the Bavarian State Library. For a general idea on the project, see GEI's website at the page: <<http://www.gei.de/en/departments/europe-narratives-images-spaces/children-and-their-world.html>>.

<sup>54</sup> The project started in 2014 and will end by 2016. The partners involved in the project with GEI are: Göttingen Centre for Digital Humanities, Humboldt University Berlin, the Institute for the History of the German Jew, the Herzog August Library in Wolfenbüttel, the Max Weber Foundation the Institute of Contemporary History in Munich, the German Historical Institutes in Rome and London, the German Institute for International educational Research. For a general presentation of the project see GEI's website page: <<http://www.gei.de/en/departments/digital-information-and-research-infrastructure/clarin-d-working-group-on-modern-history.html>>. Project website is: <<http://www.clarin-d.de/en/>>.

heart of the Institute. In GEI's Library it is preserved a unique collection of international textbooks and scholarly literature, for a total of 253,000 printed and online items<sup>55</sup>. This consistent heritage allows to consider GEI's library «the world largest library on textbooks» in the field of history, geography and civic studies<sup>56</sup>.

The textbooks collection consists of 176,500 printed volumes and online publications, of which: 24,000 are German textbooks published from the 17<sup>th</sup> century to 1945; 79,000 are German textbooks published after 1945 and 75,000 are foreign textbooks. In GEI's textbooks collection a total of 173 European and non-European countries are represented. The collection concerns mainly history, geography, politics/social studies, but in recent years, GEI's Library also started to gather textbooks on ethics and religion. In addition, the textbook collection contains: German and international primers, geographical and historical atlases, general education books, local history books and foreign German textbooks.

The academic literature collection consists of 76,500 printed volumes and online publications and mainly concerns textbook studies and teaching, methodology, didactics and curricula research from and related to different countries in the world. The scientific collection covers also other topics, such as systems of education, comparative and historical educational research, teacher-training, history, politics, geography, religion, sociology, pedagogy and comprehends as well a large and updated collection of International journals.

Each year GEI's library is visited by over 6,000 visitors, between scholars, textbook authors, teachers, students, journalists, film-makers and private citizens. Therefore, in order to facilitate the access to textbooks and scientific literature, GEI's Library staff and the *Department of Digital Information and Research Infrastructure* have been working on the development of research digital infrastructures<sup>57</sup>. Library heritage is completely indexed in *Library Opac System*<sup>58</sup> and recently a new research instrument has been developed for textbook collection: *TextbookCat*. This new tool allows to improve the

<sup>55</sup> All the data concerning GEI's Library are taken from GEI's website. The data are constantly updated by the Library staff. See <<http://bibliothek.gei.de/en/library.html>>. A profile of GEI's Library is proposed by B. Depner, R. Strötgen, *Schulbücher im Fokus: das Georg-Eckert-Institut auf dem Weg zur hybriden Forschungsbibliothek*, «BuB: Forum Bibliothek und Information», vol. 61, 2009, pp. 639-641. For a focus on the present philosophy of GEI's Library read the interview to its head E. Chen, *One of a kind. The GEI's Research Library*, «Eckert. Bulletin», 2014, pp. 77-79.

<sup>56</sup> Fuchs, *The Georg Eckert Institute for International Textbook*, cit., p. 78.

<sup>57</sup> An overall and updated presentation of GEI's digital research infrastructures is proposed by R. Strötgen, *New information infrastructures for textbook research at the Georg Eckert Institute*, «History of Education & Children's Literature», vol. IX, n. 1, 2014, pp. 149-162.

<sup>58</sup> Library Opac System is available in German and English version and can be queried focusing on the *Entire Collection* or the *Academic Literature* or *Textbook collection*. The Catalogue can be easily accessed through GEI's website or directly from this link: <<http://opac.lbs-braunschweig.gbv.de/>>.



possibilities of research inside the textbook collection, considering classification categories such as country, education level and subject as well as filters such as language. In addition, the *TextbookCat* represents a first important starting point for the development of the *International TextbookCat*, which GEI, in accordance with Turin University and National Distance Education University of Madrid, is implementing right now<sup>59</sup>.

In addition, we can mention at least two other important digital infrastructures that GEI has designed in recent years: the *GEI-Digital* and *Edumeres.net*. In 2009 GEI, with the support of the German Research Foundation (DFG), began the project *GEI-Digital*, which aims to digitalize GEI's historical textbook collection. At present, the digitalization concerns the German language books out of copyright, dating from the 17<sup>th</sup> century to 1918, but there is the purpose to enlarge the project in the next future<sup>60</sup>. In parallel to *GEI-Digital* GEI, by virtue of the funding obtained by the Lower Saxony Ministry for Science and Culture and German Research Foundation (DFG), started to develop the platform *Edumeres.net*. We are in front of a «virtual research environment where textbook researchers around the world can communicate, collaborate and stay abreast of current issues in education and textbook reviews»<sup>61</sup>. *Edumeres* is a portal with a modular structures and, in a little while, we will be able to text all its potentialities. In fact, the work on *Edumers* is in progress. Currently, the portal has two almost complete sections: *Information*, which provides a large range of tools functional for the research, and *Publication*, which allows the access to GEI's publications. About the 'Information section', we can note that it consists of numerous useful sub-sections. In *News* sub-section we find announcements of calls for papers, conferences and events. In *Literature research* sub-section we can access not only GEI's Library catalogues but also other interesting databases such as the *GEI-DZS* (i.e. the Database of textbooks approved in all German federal states) and the *Curricula Workstation* (i.e. the

<sup>59</sup> On TextbookCat and MultiOpac project see: Strötgen, *New information infrastructures for textbook research at the Georg Eckert Institute*, cit., pp. 158-159 and the presentation webpage edited by the Department of Digital Information and Research Infrastructure: <<http://www.gei.de/en/departments/digital-information-and-research-infrastructure/international-textbookcat.html>>. The TextbookCat website is available in German and English: <<http://tbcate.edumeres.net/>>.

<sup>60</sup> GEI works on GEI-Digital with the Göttingen Digitisation Centre, the Research Library for the History of Education (BBF) of the German Institute for International educational Research, the Herzog August Library in Wolfenbüttel and the Library of the Augsburg University. The digital collection is available at project website: <<http://gei-digital.gei.de/viewer/>>. In this regard, see Strötgen, *New information infrastructures for textbook research at the Georg Eckert Institute*, cit., pp. 151-154.

<sup>61</sup> *The George Eckert Institute for International textbook Research*, cit., p. 19. On *Edumeres* project see: Strötgen, *New information infrastructures for textbook research at the Georg Eckert Institute*, cit., pp. 154-158 and the project webpage written by the Department of Digital Information and Research Infrastructure: <<http://www.gei.de/en/departments/digital-information-and-research-infrastructure/edumeres-the-information-and-communication-portal-for-international-educational-media-research.html>>. *Edumeres* website is available at: <<http://www.edumeres.net/>>.

Database of current and historical curricula, query-able for country, subject and education level)<sup>62</sup>. Finally, the *Education System* sub-section provides links to national educational systems and curricula from all over the world, and allow to enter in the *Edu.data* platform, in which we can search and compare information related to textbooks from all around the world in a user-friendly manner.

On the side of publication, GEI has two specific books series and three periodical publications. The «*Eckert. The Book Series*» (Eckert. Die Schriftenreihe) is a continuation of *Studien zur Internationalen Schulbuchforschung*, it is published by Vandenhoeck & Ruprecht, Unipress of Göttingen and produces monographs on educational media research in German, French or English. The «*Eckert. Expertise*» is a new series created in 2012, it is published by V&R Unipress, and is devoted in particular to teachers and education policymakers, proposing experts' opinions, recommendations and studies on contemporary educational topics. GEI's official scientific journal is «*JEMMS. Journal of Educational Media, Memories, and Society*», published by Berghahn Journals of New York. This journal was founded in 2009 and continues on the footsteps of the previous GEI's journal «*Internationale Schulbuchforschung*» (*International Textbook Research*), born in 1979. JEMMS is an international and interdisciplinary journal, focused on educational media studies and its articles are mainly in English<sup>63</sup>. GEI also publishes the annual magazine «*Eckert. Bulletin*» and the «*Annual Report*», in which it presents the main events which have taken place in the Institute every year<sup>64</sup>. From 2014, the «*Eckert. Bulletin*» is entirely published in English, in order to communicate «more fully and effectively with [... its] international readership»<sup>65</sup>.

One important part of the textbook research promotion carried on by GEI is represented by the fellowships. GEI provides a *Fellowship Programme* for young people and established academics as well as textbook authors from all around the world, to offer them the opportunity to spend from a minimum of two weeks to a maximum of one-and-a-half months at its Library to develop studies in textbook research field with a comparative approach<sup>66</sup>. The *Georg*

<sup>62</sup> On the development process of GEI's Curricula Workstation and its functionalities, as well as the perspective of improvement see E. Chen, J. Drechsler, R. Strötgen, *The curricula workstation: providing access to curricula worldwide*, «*Eckert. Bulletin*», 2014, p. 64.

<sup>63</sup> The full-text digital texts of the two book series are freely available one and a half years after the publication on GEI's website and *Edumeres.net*. At present, the indices of JEMMS can be browsed in GEI's website, but to read the abstracts and download JEMMS's articles, see publisher's website: <<http://www.ingentaconnect.com/content/berghahn/emms>>.

<sup>64</sup> All the issues of the «*Eckert. Bulletin*» and «*Annual Report*» are available in the Publication section of GEI's website.

<sup>65</sup> The meaning of this decision is well explained by former GEI's Director Simone Lässig in the editorial of «*Eckert. Bulletin*», 2014, p. 5.

<sup>66</sup> The *Fellowship Programme* is advertised each year from 15 June and the applications should be submitted by 15 September. For the application procedure see: <<http://www.gei.de/en/>

*Arnhold Programme* aims to promote research into education for sustainable peace and allows a research period in Braunschweig from three to six months. This Programme, like the previous one, also starts annually and it is devoted in particular to scholars from the humanities, political and social sciences, education sciences or law, as well as to individuals with extensive high-level international experience in government or non-governmental organizations or international organizations, that want to support the culture of peace through their works<sup>67</sup>. In addition, we should mention the *Otto Bennemann Grant*, which annually funds a research work period at GEI (for a maximum of two months) to promote innovative methodological approaches in international textbook research<sup>68</sup>.

Finally, we have to recall that GEI also promotes awards to support textbook research. We have a biennial appointment, the *Georg Eckert research award* and the *Georg Eckert award for young academics*<sup>69</sup>. Both awards are sponsored by the Braunschweig-based educational publisher Westermann and reward works on textbook or educational media research focused on «cultural or political issues, educational practice or the sociology of knowledge». Another relevant initiative, promoted by GEI in collaboration with Leipzig Book Fair, is the *Textbook of the Year Award*<sup>70</sup>. Through this award, which is under the patronage of the Standing Conference of the Ministers of Education and Cultural affairs of the German Länder, the Institute recognizes German-speaking publishers and authors who have contributed to the innovation of textbook concepts, enhancing its social significance.

All the opportunities previously described show us how GEI really aspires to be an authentic «forum of lively academic discussion and international, interdisciplinary communication» on textbook and educational media research<sup>71</sup>.

fellowships/fellowship-programme.html>.

<sup>67</sup> The Programme is named after Georg Arnhold (1859-1926), who was a German banker, supporter of arts and convinced pacifist. The American benefactor Henry H. Arnhold instituted this Programme to honour the memory of his grandfather. All the information on the application form are available at: <<http://www.gei.de/en/fellowships/georg-arnhold-program/program.html>>.

<sup>68</sup> The grant is dedicated to Otto Bennemann (1903-2003), who supported Georg Eckert and the International Textbook Institute as mayor of Braunschweig and was Lower Saxony's Ministry of the Interior. The grant is funded by the Foundation he established. For the regulation of the Otto Bennemann Grant see: <<http://www.gei.de/en/fellowships/otto-bennemann-grant.html>>.

<sup>69</sup> The next call for application for the Georg Eckert Awards will be published in 2017. In this regard see: <<http://www.gei.de/en/fellowships/otto-bennemann-grant.html>>.

<sup>70</sup> For further information about *Textbook of the year* see: <<http://www.gei.de/en/fellowships/textbook-of-the-year/the-award.html>>.

<sup>71</sup> Cf. GEI's Fellowships presentation page: <<http://www.gei.de/en/fellowships.html>>.

### *Conclusions*

From its foundation as International Institute for Textbook Improvement to the present day, GEI has lived many changes, closely linked to the different phases experienced by textbook research field. The methodologies of analysis as well as the subjects studied have been enlarged over the years. For example, right now, the comparative approach is not only concentrated on the quantitative and content analysis, but it also implicates the iconographic and spatial aspects, just as the dimension of the 'others' in textbooks is not limited to the distorted depictures and stereotypes of the enemies, but it considers all the socio-political-economical facets of society representations. Again, the internal and trans-disciplinary dimension of the projects has been strengthened, as well as the connections between research, technical infrastructures and knowledge transfer. The narratives of Europe is still a topical subject of GEI, but this is carried on not only from an Eurocentric perspective, so that an increasing attention is also reserved to regional, national and global identities proposed in textbooks. The interaction between textbooks and society still remains a core research area of GEI and is explored with reference to the image of conflicts and crisis depicted in textbooks, as well as with attention to the representation of cultural and religious diversities, but a new aspect, related to the processes of textbook production, is also being studied. Today, GEI doesn't work only on textbooks but also on the educational media in general and aims to analyse contents as well as their effective use in classrooms and in social-educational contexts.

Despite the considerable and inevitable changes that have concerned the approach to the textbook research, at the basis of the long-lasting history of GEI there is still the same strong conviction, for which the textbook has a decisive role in the building of the present and future democratic society. All GEI's projects move from this certainty and seem guided by a precise mission: that of contributing, through textbook studies, to the improvement of the critical reflection and mutual understanding of today and tomorrow's citizens from all over the world.

# The contribution of «History of Education & Children's Literature» (HECL) to a recent international workshop on the scientific journals of history of education

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**ABSTRACT:** The article reproduces the text of the report presented at the Workshop on the journals of History of Education, held on the 26<sup>th</sup> of February 2015, as part of the Symposium of History of Education of Valladolid (Spain) and organized by the journal «Espacio, Tiempo y Educación» on the topic: *La Pedagogía ante la Muerte. Reflexiones e interpretaciones en perspectivas histórica y filosófica*. In it, the author analyses a number of issues related to the role played by scientific journals in the strengthening and internationalization of the research in the field of history of education. A particular importance, among the various debated topics, was given to the models of editorial management of the journals and their effects on the forms of scientific production, to the role of the social networks in the promotion of these same journals, to the procedures for *open-access* and *free-access* publication, to the indexing in the major international databases, such as *ISI Web of Science* by Thomson Reuters or *SCOPUS* by Elsevier, and finally to the editorial choice to focus on English monolingualism or to enhance multilingualism, publishing articles in different languages.

**EET/TEE KEYWORDS:** History of Education; Scientific Journals; Historiography; Publishing Management; «History of Education & Children's Literature»; Italy.

## *Introduction*

On the 26<sup>th</sup> of February 2015, as a part of the Symposium of History of Education organized in Valladolid, Spain, by Antonella Cagnolati (University of Foggia, Italy) and José Luis Hernández Huerta (Universidad de Valladolid),

co-editors of the journal «Espacio, Tiempo y Educación», on the topic *La Pedagogía ante la Muerte. Reflexiones e interpretaciones en perspectivas histórica y filosófica*, an important workshop on the journals of history of education was held. One of its main objectives was to «know the publishing directors' points of view about the opportunities and challenges the academic journals have to face» and to give a contribution «to the efforts of developing a mapping of the scientific production in the field of History of Education».

The workshop was coordinated by Alfonso Diestro Fernández (UNED, Madrid), and attended by the directors of some of the most important scientific journals of history of education currently published in Europe, North America and Latin America<sup>1</sup>. In order to create a more effective and organic debate, the journal editors were invited to focus on a series of subjects considered particularly significant and worthy of being made the subject of joint discussions.

In particular, the speakers were required to express their point of view on the following issues: 1) the influence of the models of editorial management on the forms and styles of the scientific production; 2) the role of social networks in spreading the progress, innovation and achievements of the journals; 3) the challenges and the critical review of the currently prevailing formulas of evaluation of the publishing quality; 4) the recognition of the role of director of a journal by the agencies dealing with the evaluation of the university teachers' activities; 5) language policy (that is the editorial choice to privilege English monolingualism or plurilingualism accepting contributions in various languages); 6) access policy: open-access philosophy / free-access system, and methods to finance journals; 7) the impact and presence of the research of History of Education in the university curriculum; 8) the possibility of collaboration between different editorial projects of History of Education.

The *Workshop on the journals of History of Education*, held in February 2015 in Valladolid, whose brief presentation was recently published<sup>2</sup>, was undoubtedly an important opportunity for dialogue and discussion between the parties – the directors of the major scientific journals – who have rarely had occasion in the past to express their point of view as managers of a journal

<sup>1</sup> The directors who participated as speakers in the workshop on the journals of History of Education of Valladolid of the 26<sup>th</sup> of February 2015 are those of the following scientific journals of Europe, North America and Latin America: «Cabás. Patrimonio Histórico-Educativo» (Spain), «Cadernos de História da Educação» (Brazil), «Educatió i Història. Revista d'Història de l'Educatió» (Spain), «Encounters on Education» (Canada/Spain), «Espacio, Tiempo y Educación» (Spain), «História da Educação/ASPHE» (Brazil), «Historia de la Educación. Revista Interuniversitaria» (Spain), «Historia y Memoria de la Educación» (Spain), «History of Education & Children's Literature» (Italy), «History of Education Issues» (Greek), «Nordic Journal of Educational History» (Sweden), «Rivista di Storia dell'Educazione» (Italy), «Theorós. Revista de Pensamiento y Educación» (Spain).

<sup>2</sup> See J. Hernández Huerta, A. Cagnolati, A. Diestro Fernández (edd.), *Connecting History of Education. Scientific Journals as International tools for a global world*, Salamanca, Ediciones FahrenHouse, 2015.

of history of education<sup>3</sup>. In this regard, both for the authority of the scholars who participated in the discussion, and, in particular, for the importance and modernity of the majority of the debated issues, the initiative promoted by the directors of the journal «Espacio, Tiempo y Educación» and coordinated by Alfonso Diestro Fernández had the merit to call the scholars' and researchers' attention on the fundamental role played by the scientific journals in the strengthening and internationalization of the research and the studies in the field.

We report below the answers given by the writer, as director of «History of Education & Children's Literature» (HECL), to the questionnaire developed in the Workshop on the journals of History of Education of Valladolid.

1. *The influence of the models of editorial management on the forms and styles of the scientific production*

«History of Education & Children's Literature», although possessing from the beginning, like the major international journals in the field, a traditional editorial structure and a rigorous procedure of *double blind peer review*, has tried to create a different and, for various reasons, alternative management model compared to the existing ones, considered by a lot of people unsatisfactory, since they influenced, in a unfavorable way, not only the styles of the scientific production, but also the same research organization in the field of history of education and children's literature.

In this sense, the journal was aimed, first of all, to prevent the reduction of the spreading of the research results, giving space not only to the traditional «articles», but also to a plurality of columns containing original contributions of different nature and approach. Not surprisingly, the *miscellaneous part* of «History of Education & Children's Literature» is characterized by four distinct sections: a) *Essays and Research*; b) *Sources and documents*; c) *Critical Reviews and Bibliography*; d) *Scientific chronicles and activities of institutions of research*.

The first part, called *Essays and Research*, includes contributions resulting from original investigations on issues related to different aspects of the history of education and children's literature; the second, entitled *Sources and documents*, includes texts, collections of documents and unpublished correspondence of particular value relative to the above mentioned issues; the third section, called *Critical Reviews and Bibliography*, contains bibliographic reviews,

<sup>3</sup> See R. Sani (ed.), *The role of scientific journals in the development and internalization of historical-educational research*, «History of Education & Children's Literature», vol. X, n. 1, 2015, pp. 13-95.

interventions and critical notes on topics and areas of research or publications of special importance, as well as reviews and reports of essays and joint works; the fourth and last part, finally, entitled *scientific chronicles and activities of institutions of research*, is aimed to introduce the activities of centers of documentation and research in the field of history of education and children's literature at a National and International level, to inform on conferences and seminars, to give account of the research taking place in various European and non-European countries.

Secondly, «History of Education & Children's Literature», as a response to the growing tendency, at an international level, to characterise the scientific journals of the sector on the basis of a specific historiographical address, by selecting the articles to be published according to this address, was intended to represent, from the very beginning, a space for dialogue and discussion between different methodological and historiographical approaches, also giving space to very different issues. We, in fact, believe that the plurality of points views and the variety of methodologies could represent, in the history of education and children's literature, a valuable resource, and that significant contributions for the development of the research at a national and local level could be originated only from a debate developed in a really international context.

At the same time, in sharp contrast with the majority of the scientific journals of the sector containing mainly – when not exclusively – articles and contributions focused on the contemporary age and, more particularly, on the nineteenth and twentieth centuries, «History of Education & Children's Literature» has given from the beginning a considerable space to the study of history of education and children's literature in the different historical periods, especially the Middle and Modern Ages.

Finally, «History of Education & Children's Literature», in order to prevent the drift towards English monolingualism and, on the other hand, to promote at an international level the historical-educational research in other languages, was characterized by the choice to include articles in French, Spanish, Portuguese, German and Italian, as well as, of course, in English, so substantially opposing to the trend characterising the other international scientific journals about humanities and social sciences.

## 2. *The role of social networks for the spread of the progress, innovation and achievements of the journals*

In Italy, «the users connecting to the Internet are almost 28 million», while «the people connecting to the most popular social network, *Facebook*, are nearly 22 million». The majority of the users, «nearly the 40% of the general population», has an account on *Facebook*, which «is used to connect with old



friends, meet new ones, to find and share information, look for partners or advertise their business». With the advent of *Facebook*, «it seems that the all the relationships, which until a few years ago were exclusively offline, are now transferred on the web»<sup>4</sup>.

It is not surprisingly, in this regard, the growing attention paid by universities and researchers to the new potentialities of virtual reality and, more particularly, to social networks as modern and more functional channels for the spread of the results of scientific research and for the enhancement of the networks connecting the scholars (*virtual communities*). We do not intend here to refer, of course, to the well-known and widespread social networks aimed at entertainment and social relations, such as *Facebook* and *Twitter*, but rather to the so-called *academic social networks*, networks of researchers and scholars whose primary aims are: to share their scientific publications, to create networks of collaborators around certain themes or research fields, to promote new and more effective forms of exchange among scholars and of evaluation of the results of the research.

This is the case, for example, of *ResearchGate*<sup>5</sup>, *Academia.edu*<sup>6</sup> e *Mendeley*<sup>7</sup>, to name only the most well-known networks, well-established realities able to engage and connect hundreds of thousands of scholars and researchers all around the world<sup>8</sup>. The undisputed success achieved in the recent years by these instruments has led some directors of international scientific journals, including those researching the history of education, to question the possible role of the *academic social networks* in the spread of the progress, the news and the results of the journals themselves. In some cases, they went further, trying to open on

<sup>4</sup> E. Chiapasco, G. Crivellaro, F. Veglia, *Psicologia e Social Network. Considerazioni teoriche sulle ragioni di un successo*, «Psychomedia. Telematic Review», Sezione: Memoria e (Tele) Comunicazione, Area: Mass Media, <<http://www.psychomedia.it/pm/telecomm/massmedia/chiapasco-crivellaro-veglia.htm>> (last accessed: January 30<sup>th</sup>, 2015). But see also D.M. Boyd, N.B. Ellison, *Social Network Sites: Definition, History, and Scholarship*, «Journal of Computer-Mediated Communication», vol. 13, n. 1, 2007, pp. 210-230.

<sup>5</sup> On *ResearchGate* (<https://www.researchgate.net/home.Home.html>), the network «dedicated to science and research», see *Professional Network ResearchGate Is A LinkedIn For Scientists*, <<http://techcrunch.com/2009/05/14/professional-network-researchgate-is-the-linkedin-for-scientists/>> (last accessed: February 2<sup>nd</sup>, 2015).

<sup>6</sup> On *Academia.edu* (<<http://www.academia.edu/>>), «a place to share and follow research», see: *Academia.edu Raises \$4.5 Million To Help Researchers Share Their Scholarly Papers*, <<http://techcrunch.com/2011/11/30/academia-edu-raises-4-5-million-to-help-researchers-share-their-scholarly-papers/>> (last accessed: February 2<sup>nd</sup>, 2015).

<sup>7</sup> On *Mendeley* (<<http://www.mendeley.com/>>), the «free academic social network for students and researchers», see *Science enters the age of Web 2.0*, <<http://news.bbc.co.uk/2/hi/technology/8325875.stm>> (last accessed: February 2<sup>nd</sup>, 2015).

<sup>8</sup> See D. Szkolar, *Social Networking for Academics and Scholars*, <<http://infospace.ischool.syr.edu/2012/06/21/social-networking-for-academics-and-scholars/>> (last accessed: February 2<sup>nd</sup>, 2015). But see also M.G. Albanesi, R. Amadeo, G. Vecchio, *Research on Efficacy of Using Social Networks in Academic Teaching Metrics, Experiments, and Results*, «European Journal of Sustainable Development», vol. III, n. 3, 2014, pp. 25-34.

these same *social networks* “pages” devoted to the scientific journals and their contents<sup>9</sup>.

«History of Education & Children’s Literature», while not denying the importance of the *academic social networks*, which are undoubtedly a modern and very effective instrument for the gathering of researchers and for the communication of research results, has not considered appropriate to use in a systematic and continuous way such instruments, considering the traditional channels of promotion of the journal and of the spread of its results adequate and more consistent with its nature and purpose. However, we are persuaded that the *academic social networks* and, more generally, the technologies and digital tools related to the development of the Internet can actually facilitate the creation of international networks of scholars and increase the spread of the research results.

It is, however, the emphatic interpretation which ideologically forces the role of the *academic social networks* proposed by some perhaps too enthusiastic supporters of those instruments, to arouse some concerns. In their opinion, the most important feature of the modern digital instruments related to the development of the Internet – not only, so, of the *academic social networks*, but also, for example, the *academic blogging* etc. – is the possibility to appeal to an audience far wider than that of the specialists and experts, promoting, thus, the free circulation of the results of scientific research in the public opinion and, therefore, the implementation of a more «democratic» and «transparent» method of research organization<sup>10</sup>.

### 3. *The challenges and the critical review of the formulas currently used in the evaluation of the editorial quality*

Speaking of the challenges represented by the formulas currently used in the evaluation of the editorial quality of the scientific journals, and of a possible critical review of these formulas, means to focus the attention on one of the most important issues related to the activities of the journals and, more generally, to the scientific communication.

<sup>9</sup> See J.L. Hernández Huerta, A. Cagnolati, *En la Historia de la Educación. La gestión editorial, las revistas de Historia de la Educación y «Espacio, Tiempo y Educación»*, «History of Education & Children’s Literature», vol. X, n. 1, 2015, pp. 39-55.

<sup>10</sup> See P. Greco, *La scienza on line circola come ai tempi di Galileo Galilei*, <<http://giacomooberto.com/giuristi/greco.htm>> (last accessed: February 2<sup>nd</sup>, 2015); R. Spezia, *La ricerca scientifica sui blog. Come la Rete sta cambiando il rapporto degli scienziati con le loro scoperte e con l’opinione pubblica*, <<http://www.ilpost.it/2011/11/01/la-ricerca-scientifica-sui-blog/>> (last accessed: February 2<sup>nd</sup>, 2015).

From 2009, «History of Education & Children's Literature» has been indexed in ISI Web of Science of Thomson Reuters, in the *Arts and Humanities Citation Index*. The journal has achieved this prestigious goal at the end of a long and complex process of evaluation, which will be analysed in order to highlight the strengths and weaknesses of a system of selection of scientific journals universally praised for its precision and objectivity, but also, at the same time, considered insufficient because focused largely on issues of a formal nature and, consequently, in need of certain essential additions.

You can easily understand the importance of such an analysis if you consider that, in Italy, the system of evaluation of scientific journals recently introduced by the ANVUR, the National Agency of Evaluation of the University System and Research, is inspired largely by the model proposed by the large international databases, such as ISI Web of Science of Thomson Reuters or SCOPUS of Elsevier, using some of their evaluation parameters<sup>11</sup>, and adapting them to the national context.

According to Thomson Reuters, as stated in the document establishing the criteria used in *The process of selection of the journals*, «the evaluation and selection of journals is an ongoing process. [...] Every year, Thomson Reuters' editorial staff examines over 2,000 journal titles and selects approximately the 10-12% of the journals to be included in its database».

The quantitative and qualitative factors taken into account in the assessment of the journals are numerous and variously articulated: «The punctuality of the publication is a fundamental criterion of the evaluation process. [...] Thomson Reuters also considers the fact that the journal follows or not the *international editorial conventions*, and if it is able to optimize the recovery of the original articles. [...] The English language is now the universal language of science: so, Thomson Reuters focuses on the journals publishing full texts in English or, at least, bibliographic information in English. [...] The implementation of the process of *peer review* provides another indication of the standards of the journal and underlines the overall quality of the research presented, as well as the completeness of the references».

We have to add two others factors of different nature to the above mentioned ones: starting from the belief that «the basis of all the academic disciplines consists of an essential core of scientific literature», and «that the scientific research calls for the creation of specialized study fields and of new journals when the published research on new topics reach a decisive resonance», Thomson Reuters considers «if the content of a journal under evaluation will enrich the database or if the topic has already been analysed adequately in the existing publications».

<sup>11</sup> See Agenzia Nazionale di Valutazione del Sistema Universitario e della Ricerca (ANVUR), *Classificazione delle Riviste*, <[http://www.anvur.org/index.php?option=com\\_content&view=article&id=254&Itemid=315&lang=it](http://www.anvur.org/index.php?option=com_content&view=article&id=254&Itemid=315&lang=it)> (last accessed: January 26<sup>th</sup>, 2015).

A particular value, finally, is given to what Thomson Reuters defines the «*international diversity* between the authors who contribute with their own articles, the editors and the members of the Editorial Advisory Board», since «the scientific research today takes place in a global context» and, for this reason, «it is more likely that journals characterized by the heterogeneity of their authors assume a gradually greater importance in the international community of researchers»<sup>12</sup>.

It is necessary to point out the essentially formal nature of the majority of the criteria used (punctuality, observance of international publishing rules, use of English, implementation of the *peer review* etc.), as well as the essentially extrinsic and, according to us, a little bit vague, nature of the reference to the «editorial content», i.e. to the originality and significance of the subject matter in relation to those characterizing the journals already in the database. It would be undoubtedly appropriate, in this regard, to integrate the existing systems of evaluation and selection, adding to the above mentioned criteria others of a different nature, able to highlight the scientific and editorial quality and the true extent of the cultural project of the journals.

But who has to evaluate the scientific quality of a journal which spread, nationally and internationally, the results of the studies and research of a particular scientific field, and what is the meaning of this process? The answer seems to be obvious: it is up to the community of scholars to assess the role played by the journals, through forms and procedures to be defined from time to time. If it is true, in fact, that a necessary parameter is that of the *competence*, it is equally true that the consideration given to a journal by the scholarly community of its scientific sector represents the only 'substantial' parameter to keep in mind in the assessing process or, rather, it constitutes the basis and the starting point for determining a set of evaluation criteria able to go beyond the formal aspects and to grasp the true scientific quality of a journal.

However, we assist, at least in Italy, to a kind of paradox, which complicated the things. In fact, in the recent years, the process of indexing in the major international databases also the scientific journals of humanities with the purpose of assessing their quality has been proposed and strongly supported by the Ministry of Education (Ministry of Education, University and Research). But it was considered not as a form of integration and strengthening of the *assessment of competence* normally exercised, in the past, by the scholarly community of the respective scientific areas, but as an alternative to it, with the objective of limiting drastically the role traditionally played by the scientific communities in this field, whose *evaluation of competence*, according to

<sup>12</sup> Web of Science, *The Thomson Reuters Journal Selection Process*, <<http://wokinfo.com/essays/journal-selection-process/>> (last accessed: January 28<sup>th</sup>, 2015). Similar criteria are adopted by SCOPUS Elsevier for the inclusion of scientific journals in its database. See in this respect: Scopus (Elsevier), *Journal selection criteria*, <<http://www.elsevier.com/online-tools/scopus/content-overview#content-policy-and-selection>> (last accessed: January 28<sup>th</sup>, 2015).

the supporters of the new course, would inevitably be characterized by self-referentiality, particularisms, corporate interests and lack of transparency.

It is necessary to emphasize that the attempts to limit drastically the *assessment of competence* made by the scientific communities, and to replace it with methodologies, criteria and indicators designed to focus the attention on formal and extrinsic aspects, risk to condition heavily the evolution and characteristics of the research itself, and to prevent the creation of a really effective system of assessment of the scientific and publishing quality of the journals.

#### 4. *The recognition of the role of the editor of a journal by the agencies evaluating the activities of university teachers*

The question of the recognition of the role of the editor of a scientific journal by the agencies evaluating the activities of university teachers implies, with specific reference to the Italian case, a number of assumptions and clarifications.

First, it is necessary to point out that the system of evaluation of the activity of the university teachers currently used in Italy, the so-called VQR (Assessment of the Research Quality), promoted and managed by ANVUR, takes into account research products such as «journal articles; books and book chapters; critical editions, translations and scientific comments; patents; other products such compositions, drawings, performance, software, databases, and others»; and that the evaluation of such research products, for what concerns the humanities and the social and legal sciences, is based on the method of the *peer review*<sup>13</sup>.

The integrated system called AVA (Self-assessment, Periodic Assessment, Accreditation) will be soon added to the regular assessment process focused on the VQR. It is intended to provide «a periodic assessment of the quality, efficiency and of the results achieved by the universities» for what concerns the teaching and research activities of the universities. Such a system includes the annual survey of a series of parameters:

- List of the publications with the indicators recognized by the scientific community, when they are included (quotes, impact factor of the hosting journals etc.);
- Scientific responsibility at the level of the whole project or of the local unit of research of national and international research projects, selected

<sup>13</sup> Agenzia Nazionale di Valutazione del Sistema Universitario e della Ricerca (ANVUR), *Valutazione della Qualità della Ricerca 2004-2010*, <[http://www.anvur.org/index.php?option=com\\_content&view=article&id=28:vqr2004-2010-it&catid=13:sito-it&Itemid=119&lang=it](http://www.anvur.org/index.php?option=com_content&view=article&id=28:vqr2004-2010-it&catid=13:sito-it&Itemid=119&lang=it)> (last accessed: January 26<sup>th</sup>, 2015).

for the funding thanks to competitive announcements which provide for the peer review;

- Coordination of international research networks;
- Coordination and responsibility of national and/or international research institutions;
- Direction of journals, book series, encyclopedias and treatises considered prestigious;
- Participation in editorial boards of journals, book series, encyclopedias and essays;
- Participation in committees programming international conferences;
- Participation in nationally and/or internationally recognized academies;
- Achievement of awards for scientific activity<sup>14</sup>.

They are a plurality of parameters. However, it is not specified the weight given to each of them in the process of assessment of the performance of the individual researcher.

Beyond this inconsistency, that is far from being trivial and insignificant, it must be emphasized the substantial underestimation of the role that journals are called to perform not only in terms of the spread, at a national and international level, of the research results, but also for what concerns the analysis of the new lines of investigation and the development of the processes of innovation and internationalization of the research.

These are instances and skills giving the directors of scientific journals a strategic role in the organization of the research activity at a national level and also in the building of an international space of confrontation between students of different countries, that deserve a more adequate enhancement by the agencies evaluating the activities of university teachers.

##### *5. Language policy (i.e. the editorial choice to privilege English monolingualism or the plurilingualism accepting articles in different languages)*

From the beginning «History of Education & Children's Literature» has chosen to publish articles in English, French, Spanish, German and Portuguese, as well as, of course, in Italian. A choice that is aimed at the enhancement of the contributions of national scholars and research groups and at the protection, even from a linguistic point of view and respecting the forms and methods of scientific communication, of the peculiar characteristics of the various national

<sup>14</sup> Agenzia Nazionale di Valutazione del Sistema Universitario e della Ricerca (ANVUR), *Autovalutazione, Valutazione e Accreditamento del Sistema Universitario Italiano* (9 gennaio 2013) <<http://www.anvur.org/attachments/article/26/1.%20testo.pdf>> (last accessed: January 26<sup>th</sup>, 2015).

historiographies; in the belief that the *local and national level* is the perfect center of gravity of the historical educational research and the *national language* its main and most suitable distribution channel.

In this respect, for what concerns the issue of linguistic communication, the internationalization of the historical educational research, although necessary, can not mean the abandonment of the national language, which, typically, is the language of the documentary archival and printing sources used by the historian and, at least partially, of the critical literature used in his investigation.

It is true, however, that the decision to privilege multilingualism, publishing articles in several languages on «History of Education & Children's Literature», clashes with a reality of European and non-European scholars that have already largely adopted the English monolingualism, because of several factors: the reduced circulation, internationally, of articles published in a language different from English; and the trend of the leading international databases to index mainly scientific journals in English (this is the case, in particular, of ISI Web of Science of Thomson Reuters, but not only).

In the period 2006-2014, thanks to the possibility to publish articles written in the main national languages of the European continent, the articles published in HECL were:

- 48.7% in English
- 39% in Italian
- 6% in French
- 4.5% in Spanish
- 1.4% in German
- 0.2% in Portuguese

It is interesting to speak about the choice made by the Italian scholars with reference to «History of Education & Children's Literature» during the period 2006-2014, to confirm a growing and, in some ways, inevitable trend of the scholars to prefer English monolingualism: in fact, the 43% of the articles published in the journal was in English. A choice destined to undergo a further expansion, as evidenced by the fact that the use of English for the spread of research results has seen a steady increase, rising from 21.7% in 2006 to 42.8% in 2010, up to 57.4% in 2014.

Such a condition induces us to look realistically and without ideological prejudices to what is happening on the international scene, aiming, on the one hand, to preserve *multilingualism* and to support the use of the main national languages as a vehicle for the spread of research results, in order to preserve the original features of the various national historiographies; and, on the other, to support – or at least not to hinder – the increasing use, even on the side of the historical-educational studies, of English as the language of scientific communication.

However, the experience of «History of Education & Children's Literature» testifies that the two opposing options – *multilingualism* and *English*

*monolingualism* – can be reconciled, as evidenced by the fact that we succeeded in obtaining the indexing in ISI Web of Science of Thomson Reuters without abandoning the original choice to safeguard and promote linguistic diversity in scientific communication.

#### 6. Access policy: open-access philosophy/free-access system, and methods of financing journals

Although we have a positive view of the *open access* philosophy, understood as a movement that wants to give free access to knowledge and, specifically, to the scientific literature and to the academic cultural production<sup>15</sup>, we are very skeptical about the real exaltation of the so-called «social» or «mass use» of scientific knowledge. Its consequence is the open access to research results, – the «availability for the public» without restrictions of the «intellectual wealth» produced by universities and research institutes, to quote Robert Darnton<sup>16</sup> – that, besides being an essential factor in the development of democracy, would be a definite advantage for the growth of innovation and competitiveness in advanced societies<sup>17</sup>.

For what concerns the use of the *open access* system in «History of Education & Children's Literature», we have considered it, from the beginning, not practical for the situation in which we are operating. Furthermore, some of the advantages deriving from its adoption<sup>18</sup> could also be achieved by using the business model, by virtue of the close link with the university structures derived from the particular nature of the publishing enterprise which publishes the journal.

It is appropriate to specify, in this regard, that «History of Education & Children's Literature» is published by the University Press of the University of Macerata (E.U.M.), which oversees its layout and printing, as well as the distribution and sale (the on-line sale, in Italy and abroad, it is entrusted to *Casalini Digital*). Although the costs of production and distribution of the journal are very low – it can rely, in fact, on the voluntary work of a group of

<sup>15</sup> See L. Paccagnella, *Open access. Conoscenza aperta e società dell'informazione*, Bologna, il Mulino, 2010; M. Cassella, *Open access e comunicazione scientifica. Verso un nuovo modello di disseminazione della conoscenza*, Milano, Editrice Bibliografica, 2012.

<sup>16</sup> R. Darnton, *The Case for Books. Past, Present, and Future*, New York, Public Affairs, 2009; It. Trans. *Il futuro del libro*, Milano, Adelphi, 2011, p. 133.

<sup>17</sup> See Department for Business Innovation & Skills, *Innovation and Research Strategy for Growth*, December 2011, <[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/32450/11-1387-innovation-and-research-strategy-for-growth.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/32450/11-1387-innovation-and-research-strategy-for-growth.pdf)> (last accessed: January 24<sup>th</sup> 2015).

<sup>18</sup> See M. Casella, *Costi e modelli economici dell'Open Access*, «Biblioteche Oggi», vol. 30, n. 10, 2012, pp. 3-11.



professors and researchers responsible for its direction and editing (editing and contacts with authors, coordination and management of the referee process and of the website, relationships with international *databases* etc.) –, it should be specified that such costs are totally at the expense of the University of Macerata, to which are conferred the incomes derived from the annual subscriptions and the sale of the journals.

Given the significant opportunities offered by the open access journals that permit the free and unlimited access to the contents and the possibility to reuse and share them, «History of Education & Children's Literature» can rely not only on the distribution guaranteed by the University Library System (SBA), but also on the possibility to spread for free a significant number of copies of each issue in a wide network of public, university and non university, Italian and foreign libraries, thus making possible an adequate circulation of the contents of the journal.

#### 7. *The impact of the presence of the journals of History of Education in the university curriculum*<sup>19</sup>

The growing process of simplification of university education, more and more similar to the secondary one, and the constant lowering of the standards of quality of the curricula of the degree courses of science of education are, at least in Italy, a fact difficult to refute. Among its more direct and serious consequences, in our opinion, must be placed the increasing gap between the research activity and the teaching one, i.e. the university education: in fact, the growing need to ensure the acquisition of general and basic skills in order to fill the – sometimes very serious – educational gaps of the majority of the students, causes a gradually abandonment of the traditional university approach focused on the analysis of the more advanced and innovative studies and of the most recent results of the Italian and international scientific research<sup>20</sup>.

In this regard, it seems very difficult to imagine a «didactic» use of the scientific journals of History of Education in the degree courses of first and

<sup>19</sup> Actually, the topic was expressed in a more general sense and dealt with, «the impact and presence of the research of History of Education in the curriculum of History of Education». In order to avoid the indeterminacy connected to the 'research' in the field of history of education and, on the other hand, in order to bring the discussion within the boundaries of the reflection on scientific journals, we considered appropriate to replace the term 'research' with that of 'journals'.

<sup>20</sup> See P. Potestio, *L'università italiana: un irrimediabile declino?*, Soveria Mannelli, Rubbettino, 2009; A. Graziosi, *L'università per tutti. Riforme e crisi del sistema universitario italiano*, Bologna, il Mulino, 2010; S. Boffo, E. Rebeggiani (edd.), *La Minerva ferita. Crisi e prospettive dell'università in Italia*, Napoli, Liguori, 2001; P. Prodi, *Università dentro e fuori*, Bologna, il Mulino, 2013.

second level (Bachelor and Master degrees) of Science of Education in the Italian universities.

The situation is different if we refer to the so-called «third level» of the university education, the Ph. D. Courses, whose purpose is to provide a specialized education aimed at a high level research activity in the various scientific fields<sup>21</sup>. With reference to the Ph. D. Courses in education, the «didactic» use of the scientific journals, first of all those dedicated to the problems of history of education, should be considered not only useful, but in some aspects fundamental.

We refer here not only to the interesting and appropriate analysis – within the teachings of history of pedagogical and educational historiography – of the origins, characteristics and functions of the various international journals of the sector, but rather to their use as «tools» for the creation of a didactic more consistent and functional with the objectives of the Ph. D. Courses: to «prepare to the research through the research», through the acquisition of the knowledge and skills essential for the carrying out of the research itself.

In this regard, a particular importance is given to the workshops aimed to deepen – through the systematic analysis of some of the major and most authoritative scientific journals – the more relevant issues and research topics, the most used survey methods and, last but not least, the prevailing trends in the international pedagogical and educational historiography.

More specifically, the promotion of an ongoing debate on the new historiographical problems, methods and addresses conveyed through the scientific journals would allow the young researchers not only to acquire the well-established results achieved by a tradition of research and studies – for example through the analysis of those works that are now the real «classics» of the pedagogical and educational historiography – but also, and above all, to focus – through the presentation of the first results of their historical research in the form of ‘journal articles’ – on what are the various stages of the process of data processing and to understand the evolutionary dynamics of the scientific inquiry.

<sup>21</sup> See, in this regard, the *Relazione conclusiva* [Final report] presented by the Study Commission to develop proposals about «Ph. D. Courses», established by the Minister of Education, University and Research Maria Chiara Carrozza with the Ministerial Decree of 3 July 2013, n. 596, <<http://hubmiur.pubblica.istruzione.it/web/istruzione/dettaglio-news/-/dettaglio/News/viewDettaglio/28813/11210>>.

### 8. *The possibility of collaboration between editorial projects of History of Education*

If «collaboration between editorial projects of History of Education» means the implementation of initiatives to promote a closer union and to create new forms of collaboration among the scientific journals, there is no doubt that this cooperation is not only possible but also highly desirable, especially if aimed at raising the quality level of scientific production and at promoting the internationalization of the studies and research of history of education in the various countries.

In this regard, among the many possible forms of cooperation, it is worth pointing out that related to the common planning of monographic issues focusing on important topics of international interest, or that relating to the implementation of critical reviews intended to present, simultaneously on several international journals, the most recent and authoritative scientific production of one or more countries.

In the perspective, we strongly advocate, to confer to the international scientific journals of history of education a direct function of guidance in the renewal of the methodological and historiographical approaches, they could also assume the task of promoting a real debate on this issue, aiming to hold together the local and national issues with those of an international significance.

Other forms of collaboration among the scientific journals may eventually be on the fundamental side of the selection and education of young researchers, by creating special sections, common to a certain number of journals, designed to present – and also to discuss on the basis of the contributions of the most renowned scholars – the results of their first research works.



# The Xenophon's pedagogy of the care of the self\*

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**ABSTRACT:** The oeuvres of Xenophon, the ancient Greek thinker and Socrates' pupil, is considered as the unique source of scientific and pedagogical research, valuable for the history of education, educational theory and practice of the «care for the self». In this corpus there accentuated particular pedagogical extracts focused on the problem of the man who cares for himself through his responsible attitude towards educational content and towards himself as a pupil and a teacher at the same time. The analysis of these texts allowed to make a pedagogical evaluation of the dialogue that Xenophon initiated with the Greek educational tradition of his time, and to claim that the man caring for himself took a special place in his works.

**EET/TEE KEYWORDS:** Social Education; Educational Practices; Xenophon; Ancient Greece.

## *Social education for a man who cares*

The idea of a man who cares for the *polis* and for oneself by means of education is encompassed in the notion of «ἐπιμέλεια» [care] and takes special place among fundamental pedagogical ideas of the antiquity. On the one hand,

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the life of an ancient Greek man, in his own view, involved a series of «cares» for the body and the soul which enabled him to not only compete with others in strength, beauty and endurance, but also to be less vulnerable to passion and vices thus becoming more perceptive to education and culture. On the other hand, a Greek citizen could have never been on his own since he always belonged to the *polis*, which required realization of the range of other responsibilities (about family, business, friends, property, health, reputation, etc.)<sup>1</sup>. The usage of this concept in pedagogical context was fairly widespread at the time as the educational policy strategies and the individual educational strategies were assessed by ancient mentors based on what deserved special attention and care in private and state affairs. Each Hellene had social connections which created some opportunities for self-realization and at the same time limited the others. Caring to retain these links played an exceptional role and was connected with personal rules which an educated individual formulated on his own and importance of which he demonstrated to others. Such a person was one of the focal points in ancient Greek texts where the authors concentrated their attention on a particular attitude to educational content and to oneself as to a teacher and a pupil at the same time.

### *Xenophon's care*

The claim that there is no «carefree» education – education free from wide range of responsibilities, typical for a citizen – originated from the works of Xenophon (about 430-355 BC). Xenophon was the son of a wealthy Athenian, the Socrates' pupil and a multitalented man, who was an accomplished philosopher, biographer, writer, historian, general, politician. Characterizing Xenophon, T. Gomperz points out that assessing complex character is as difficult as assessing multiple talent. However both of them are combined in Xenophon. That's why it is not surprising that his personality is not clearly defined and thus it was overestimated in the past and is underestimated in the present<sup>2</sup>. This inconsistent character, composed of controversial traits of complex personality and talent, has been formed mainly due to the fact that his figure is most often juxtaposed with others. Thinkers of different ages eventually deemed him void of originality rather than trying to find it, because they compared this man with Herodotus or Thucydides as with historians, with Plato as with a philosopher and translator of Socrates' ideas, with Alcibiades as with a general. Nevertheless, his works

<sup>1</sup> See A.L. Boegehold, A.C. Scafuro (edd.), *Athenian Identity and Civic Ideology*, Baltimore, 1994.

<sup>2</sup> T. Gomperz, *Greek Thinkers. A History of Ancient Philosophy*, 4 vols., New York, 1901-1912, vol. 2 (1905), pp. 126-129.

are original indeed. Thus employing common words to describe daily routine he strives to make it extraordinary and engaging for readers. His personages weren't just engulfed in everyday cares, but rather used them for educational construction and renewal of themselves. In the corpus of Xenophon's texts the works devoted to teachings for a man who cares for polis and himself take a special place. This is the man who can not only change the surroundings and himself, but also adequately accept all that he isn't able to alter.

### *Symposium*

In his dialog «Συμπόσιον/ Symposium» Xenophon tried to stress the changes which had been happening in Athenian society and education. The content of this dialog comes down to description of a table talk between educated Athenian noblemen including Socrates. The purpose of this work, as formulated by Xenophon at very beginning, was to commemorate for the future generations highly upright people not only through their deeds, but through their entertainment. P.P. Hogan points out that for an ancient Greek it was important to properly present oneself on such occasions to maintain and reinforce his status in the eyes of others (all of which was implied by the term «μελέτη» – «care»), therefore, Xenophon's «Symposium» combines the pleasure from the banquet and the enjoyment of the presentment of intellect<sup>3</sup>. He introduces the conversation employing different strategies of self-presentation so subtly that readers immediately forget that this is merely a table talk. However, T. Gomperz considers that Xenophon's «Symposium» is stylistically inferior to the Plato's one and that his author speaks about pedagogical issues in a totally inappropriate manner:

It is as if one were to wedge in the question of the possibility of teaching virtue between such phrases as 'How do you do?' and 'How hot it is here?' in a drawing-room conversation<sup>4</sup>.

For the time being, setting aside the extent to which Xenophon managed to show by what means the older teach the younger about live in the polis, let's consider the essence of «the care of the self» pedagogy, which was focused on casual exposure to commonly approved ways of thinking and behavior.

Xenophon depicts the ancient Greek symposium as a particular educational atmosphere where the world of the young is perfectly integrated into the world of adults. Combining everyday routine and pedagogical reality Xenophon

<sup>3</sup> P.P. Hogan, *A terrible passion and a marvelous love: greco-roman education and elite self-presentation in the High Empire*, Diss. Submitted in partial fulfillment of the requirements for the degree of Doctor of Philosophy in The University of Michigan. The University of Michigan, 2005.

<sup>4</sup> Gomperz, *Greek Thinkers. A History of Ancient Philosophy*, cit., p. 127.

describes the manner in which mature citizen educate the youth through edifying talks about the cares of a nobleman. The characters of «Symposium» differ from each other in status, age and education level, though they manage to draw a line between the care of the soul and the care of the body. The former involves the care for family, friends and likeminded people as well as the ability to learn from their experience, whereas the latter is focused on keeping healthy by means of exercises for better sleep, appetite, physique, etc. Thus one of the guests at the feast take pride in having received the classical education:

My father was anxious to see me develop into a good man – said Niceratus –, and as a means to this end he compelled me to memorize all of Homer; and so even now I can repeat the whole Iliad and the Odyssey by heart<sup>5</sup>.

Here Niceratus ambitiously claims possession of the universal knowledge, since Homer is referring to all areas of life, but at the same time he was baffled by Aristophanes' question about reigning skills. M.E. Grabar'-Passek points out that this passage clearly reveals Xenophon's opposition to classical educational. Showing such disrespectful attitude to Homer Xenophon is deriding the education system of young Athenian aristocrats such as Niceratus, the son of rich and conservative Nicias, the head of the aristocratic party at the time of the Peloponnesian War<sup>6</sup>. Apparently, Xenophon considers another education system more acceptable. Therefore, it's not coincidental that his Socrates questions the Aristippus' argument about the carefree life being the best one proving the significance of the life full of cares which teach people endurance, patience, moderation and give opportunity for self perfection.

### *Memorabilia*

Describing the trial in his «Ἀπομνημονεύματα / Memorabilia», Xenophon points out that an accusation in youth demoralization was in essence the accusation in unadequacy of Socrates' «care of the self» pedagogy. Xenophon constructs «Memorabilia» as series of dialogues logically justifying his mentor, who turned many away from the vices and gave them hope that if they were to care for themselves, they would become upright:

<sup>5</sup> Xenophon, *Symposium: Xenophon in Seven Volumes*, Cambridge, MA, Harvard University press - London, W. Heinemann, 1979, <<http://data.perseus.org/citations/urn:cts:greekLit:tlg0032.tlg004.perseus-eng1:3.5>> (last accessed: November 29<sup>th</sup>, 2014).

<sup>6</sup> M.E. Grabar'-Passek, *Ksenofont. Istorija grecheskoj literatury*, 2 vols., Moscow, 1955, vol. 2, s.106.



Such was his own character: how then can he have led others into impiety, crime, gluttony, lust, or sloth? On the contrary, he cured these vices in many, by putting into them a desire for goodness, and by giving them confidence that self-discipline would make them gentlemen<sup>7</sup>.

G. Danzig considers this Xenophon's work the particular response to post-trial debates since it wasn't accidental that his mentor-Socrates fell victim to unjust allegations but in fact he wanted to die for his pedagogy<sup>8</sup>. Xenophon's Socrates unequivocally claimed not only which subjects are to be taught, but also to what extent they are to be covered. He actively intervened in his pupils' daily routine advising how much to sleep, what to eat, how to manage their own property, what to wear, etc. This particular approach apparently came down to establishing a reasonable balance between the cares for the soul and for the body, all for the sake of education. B. Lorch emphasizes that in Xenophon's logic the secret of Socrates as a mentor is fairly simple as he manages to convince a man to temporarily turn away from his cares in order to discuss the questions which are at first glance totally irrelevant to them<sup>9</sup>. Redirecting the attention of his interlocutor from the cares for possessions, fame or wealth to the cares for personal education, Socrates gave an example of a care that a pupil had to show for himself, which was above the cares for possessions, fame or wealth.

In one of the dialogues from «*Memorabilia*» Pericles and Socrates come to an agreement that Athenians ceased to care for themselves since they quit caring for their soul as well as the body. Xenophon insists that the care for these very things was giving up and illustrating this thesis with following examples: «they despise all their elders, beginning with their own fathers», «they not only neglect to make themselves fit, but mock at those who take the trouble to do so»<sup>10</sup> Pericles agrees with Socrates in that Athenians can become not any worse than their forefathers and regain the former status and prosperity of Athens in two ways: «If they find out the customs of their ancestors and practice them as well as they did, they will come to be as good as they were; or failing that, they need but to imitate those who now have the pre-eminence and to practice their customs, and if they are equally careful in observing them, they will be as good as they, and, if more careful, even better»<sup>11</sup>. In Russian translation there is no notion of «the care of the self», which was understood by each Athenian in context of individual educational perspectives, since the Xenophon's original

<sup>7</sup> Xenophon, *Memorabilia: Xenophon in Seven Volumes*, Cambridge MA - London, Harvard University press, 1923 <<http://data.perseus.org/citations/urn:cts:greekLit:tlg0032.tlg002.perseus-eng1:1.2.2>> (last accessed: November 29<sup>th</sup>, 2014).

<sup>8</sup> G. Danzig, *Apologizing for Socrates: Plato and Xenophon on Socrates' Behavior in Court*, «Transactions of the American Philological Association», vol. 133, n. 2, 2003, pp. 317-318.

<sup>9</sup> B. Lorch, *Xenophon's Socrates on Political Ambition and Political Philosophy*, «The Review of Politics», vol. 72, n. 2, 2010, pp. 189-211.

<sup>10</sup> Xenophon, *Memorabilia: Xenophon in Seven Volumes*, cit.

<sup>11</sup> *Ibid.*

term, «ἐπιμελέστερον» (the one caring for something), is translated as «life style». However such concept is fully retained in English translation.

### ‘Oikopaedia’

In his assessment of Athenian education Xenophon intentionally stresses the significance of intergenerational pedagogic interactions. His concept of «care» is related not only to «polis» with its inherent civil rights and obligations, but also to «oikos» that involves family rights and responsibilities. The Athenian oikos generated some tension between polis and the self<sup>12</sup>; was a complex but dynamic establishment structured according to hierarchy and dichotomy rules for men and women, the free and suborned, the insiders and outsiders<sup>13</sup>. J.B. Dann stresses that the oikos of Xenophon’s time represented a living organism which simultaneously experienced joy and concern at the time of a child’s birth. On the one hand, children could get good education and thus commemorate their parents as well as immortalize the oikos by glorious deeds for the benefit of the polis. On the other hand they could ruin their parent’s reputation and «elicit a form of social death»<sup>14</sup>. In the «Medea» of Euripides emphasized the fact that the greatest sorrow is the one that parents feel as a result of using wrongful strategy in bringing up their children.

For Xenophon the optimal polis organization and its active participation in people’s lives began with proper formation of oikos – households aggregated into a polis. This idea was expressed most clearly in his dialogue, «Οἰκονομικός / Oeconomicus», which describes men and women baring many household duties and responsibilities. Contextually it is divided in two parts, where Socrates first discusses household matters with Critobulus and then talks with Ischomachus about land cultivation. Critobulus comes to Socrates and asks for his help in perfecting himself (Xenophon uses the expression «ἐπιμελομένω, ταῦτάς μοι καὶ αὐτὰς»<sup>15</sup> which can literally be translated as «care for the changes that could change you»). Socrates explains to him that such process possible only for those who understand the care for the virtues as the bases of intra-family relations.

<sup>12</sup> J. Roy, ‘Polis’ and ‘Oikos’ in *Classical Athens*, «Greece & Rome», vol. 46, n. 1, 1999, p. 4.

<sup>13</sup> M. Trümper, *Space and Social Relationships in the Greek Oikos of the Classical and Hellenistic Periods*, in Id. (ed.), *A companion to families in the Greek and Roman worlds*, Maiden, B. Rawson, 2011, p. 33.

<sup>14</sup> J. Blackmore Dann, *The world of the infant: ideology of the infant condition and infant care in ancient Greece*, Diss. Presented in Partial Fulfillment of the Requirements for the Degree Doctor of Philosophy in the Graduate School of The Ohio State University, The Ohio State University, 1999, pp. 51-53.

<sup>15</sup> Xenophon, *Economics: Xenophontis opera omnia*, Oxford, Clarendon Press, 1921 (repr. 1971), <<http://data.perseus.org/citations/urn:cts:greekLit:tlg0032.tlg003.perseus-grc1:4.1>> (last accessed: November 29<sup>th</sup>, 2014)

Ischomachus, another personage of «*Memorabilia*», treats his wife as a mentor attempting to demonstrate that realization of the concept that men care for the glory whereas women care for the hearth doesn't come quickly. According to Xenophon, properly defining the personal scope of cares means understanding oneself. D.O. Davies brings our attention to the fact that Xenophon considers any kind of care primarily as a public reward («εἰς τὸ μέσον»)<sup>16</sup>. Series of dialogues between Ischomachus and his wife illustrate the process of «teaching to care» («ἐπιμέλειαν διδασθῆναι»), which allows the head of a household to choose the optimal behavioral strategy at the right time and lets his wife accept it, having undergone some additional schooling under his guidance. Xenophon's Socrates strives not only to describe and rate all household cares for Critobulus and Ischomachus, but also to demonstrate an exceptional importance of the household head's educational care for himself. In doing so, he plays the role of a mentor for all household members, who can comprehend the care for each other under his supervision.

### *Cyropaedia*

From the stand point of pedagogy it is very important for Xenophon what happens within oikos. Particularly if there takes place formation of an individual to be vested with power and authority in future. This very oikos gets Xenophon's attention in «Κύρου παιδεία / *Cyropaedia*», where he describes how the inquisitive, cheerful and chatty little boy, who has a habit of following everyone like a small dog, is transformed into a wise ruler and mentor who cares for his subordinates. D.L. Gera stresses that in the IV century B.C. the Greeks were captivated by everything of Persian nature, though «*Cyropaedia*» is not merely a biography or a novel about the Persian king, but rather a didactic work whose author believes in power of education by strong personal example<sup>17</sup>. Having been introduced as Cyrus' mentor, his father, Cambyses, was able to explain to his son that the care for the self is inseparable from the care for others. This fact leaves the reader without a single doubt regarding the fidelity and integrity of the oikos where the future Persian leader Cyrus was being brought up. The considerable part of «*Cyropaedia*» is devoted to the dialogues between Cyrus and his father through which he tries to introduce

<sup>16</sup> D.O. Davies, *The education of Socrates in Xenophon's «Oeconomicus»*, Diss. Submitted to the Faculty of the Graduate School of State University of New York at Buffalo In partial fulfillment of the requirements for the degree of Doctor of Philosophy, The State University of New York at Buffalo, 1989, p. 62.

<sup>17</sup> D.L. Gera, *The Dialogues Of The Cyropaedia*, Oxford, s.e., 1987, pp. 1, 7.

his son to «the care for the self» [ἐπιμέλεια ἑαυτου], i.e. to kindle the desire for continuous improvement of his education.

Imitating his father, Cyrus claims that it is necessary to constantly care about remaining a valiant man not to become careless, to remember about the importance of taking time for learning, to be an example for your children teaching them to spend their time in noble activities (see Xenophon, *Cyropaedia* 7.5.76, 4.3.12, 7.5.86)<sup>18</sup>. Having convinced his audience of the fact that such character as Cyrus is a product of special *paideia* («*Cyropaedia*»=«Κύρου παιδεία»), Xenophon recommends the Hellenes to foster themselves via self-discipline following Cyrus' example. A particular genre of dialogue-novel about the upbringing allowed Xenophon to demonstrate one of the possible ways for a man vested with power to search for his inner self. His Cyrus is the perfect Commander in Chief, who manages to achieve reasonable balance between the care for the self and all other cares including the care for the health and provision for his soldiers, for the property and the lives of the defeated and for maintaining respectful and politically viable relations with like minded people.

### *Conclusion*

Considering Xenophon's oeuvres leads to a conclusion that among many of the «cares» which contributed to polis and oikos stability the Greeks particularly distinguished those that were conducive to more systematic development of the state and the self. In fact, Xenophon not only wrote history, but also invented history, depicting it from pedagogical perspective. Teachings of «the other pupil of Socrates» address not only to the ideal state, but also to the ideal man. It is unique source material for studying different aspects of inchoate understanding of educational process in terms of fostering personal urge and zeal in caring for polis and the self. Therefore in Xenophon's pedagogy of the care for the self theoretical and practical components of daily life become knitted together by means of people's lives. His characters care for themselves by caring for others. They are portrayed to set an example and to encourage everyone who strives to establish himself through education. Since the one who cares for oneself could be either a man vested with power and laden with global cares or a common citizen with quite narrow scope of interests, education strategies proposed by Xenophon were fairly diverse. However all of them were devised for those who wanted to put up a fight against his own shortcomings and tendency to live a careless life.

<sup>18</sup> Xenophon, *Cyropaedia: Xenophon in Seven Volumes*, Cambridge, MA, Harvard University press - London, W. Heinemann, 1914, <<http://data.perseus.org/texts/urn:cts:greekLit:tlg0032.tlg007.perseus-eng1>> (last accessed: November 29<sup>th</sup>, 2014).

*Notices* / Recensioni



## Notices

## Recensioni

Giovenale Dotta, *Leonardo Murialdo. Infanzia, giovinezza e primi ministeri sacerdotali (1828-1866)*, Roma, Libreria Editrice Vaticana, 2011, 347 pp.

Giovenale Dotta, *Leonardo Murialdo. L'apostolato educativo e sociale (1866-1900)*, Roma, Libreria Editrice Vaticana, 2015, 486 pp.

La documentatissima biografia di Giovenale Dotta sul sacerdote torinese Leonardo Murialdo (1828-1900) presentata in questi due volumi offre molteplici spunti di riflessione sulla poliedrica personalità di don Murialdo, educatore e animatore del movimento cattolico subalpino nella seconda metà del XIX secolo.

Dal punto di vista educativo e pedagogico (l'osservatorio nel quale si pone questa nota) essa fornisce tre principali motivi di interesse: la formazione della sensibilità educativa mediante la partecipazione alle iniziative degli oratori diretti da don Bosco

(anni '50), la successiva e duratura responsabilità della direzione del collegio degli Artigianelli di Torino assunta nel 1866 con le annesse vicende che portarono alla fondazione della congregazione dei padri Giuseppini (1873) e i rapporti con la cultura educativa e pedagogica cattolica del secondo Ottocento.

L'interesse di don Murialdo per l'educazione dei giovani si manifestò presto. Giovane prete fu attivo animatore di due oratori di don Bosco: quello dell'Angelo Custode e quello di San Luigi di cui fu responsabile per circa un decennio. Anche il giovane Murialdo, come il fondatore dei Salesiani, è colpito dal manifestarsi nella società subalpina di metà Ottocento di una condizione giovanile alquanto diversa rispetto alle consolidate tradizioni educative del passato: di qui la «scoperta della gioventù» come nuova frontiera dell'educazione.

A contatto con nuovi stili di vita meno legati alla concezione cristiana della vita

i giovani appaiono più esposti all'indifferenza religiosa. Sono soprattutto i ragazzi poveri, senza famiglia, in cerca di un'occupazione, spesso lasciati a se stessi e, dunque, particolarmente fragili a preoccupare don Bosco e don Murialdo. La precarietà della loro esistenza mette a rischio infatti la loro salvezza eterna.

Più avanti saranno anche la durezza del lavoro industriale e la promiscuità delle officine e delle fabbriche ad allertare i sacerdoti e a spingerli a formare giovani saldi nelle virtù cristiane. La questione sociale si intreccia in tal modo con la vita religiosa e le tematiche educative.

È precisamente di questo contesto che matura e si rafforza l'impegno educativo e organizzativo del Murialdo. La sua pedagogia riflette le prassi perseguite da gran parte degli educatori religiosi di quel periodo: istruzione catechistica, frequenza dei sacramenti (soprattutto la confessione e l'eucaristia), esercizi di pietà rivolti verso il Sacro Cuore di Gesù e la pietà mariana. Non si poteva parlare di educazione senza un fondamento religioso.

Nel collegio degli Artigianelli – che raccoglieva i ragazzi più poveri e sbandati dell'ex capitale – e nelle iniziative che lo affiancavano la figura di don Murialdo spicca soprattutto per la sensibilità manifestata sul piano dell'organizzazione educativo-professionale-scolastica.

Non vorrei che questa affermazione fosse intesa in senso riduttivo: ci sono educatori che parlano soprattutto alle coscienze, formidabili forgiatori di anime e ci sono educatori che, senza venire meno al rapporto immediato con gli allievi, danno il meglio di sé nel concepire un disegno unitario di opere, iniziative, regolamenti che sanno rispondere al bisogno specifico di un'epoca storica. Mi sembra di poter affermare che Leonardo Murialdo appartiene alla seconda tipologia di educatori cristiani. Concretezza ed efficienza furo-

no alla base della sua azione gestionale ed educativa.

A differenza di don Bosco non ambì proporre un proprio «sistema educativo», nonostante una larga conoscenza delle esperienze d'avanguardia di educazione giovanile realizzate in varie parti d'Europa (ripropose a Torino le iniziative dell'abate marsigliese Joseph Timon-David, del Patronage Notre Dame de Nazareth di Parigi nonché quelle delle scuole agrarie distribuite in più luoghi).

Rispetto alle scelte compiute da don Bosco a partire dagli anni '60 (quando cominciò ad aprire collegi d'istruzione secondaria e a rivolgersi a un'utenza non più solo rappresentata da ragazzi poveri), il Murialdo restò più strettamente fedele al principio del sostegno ai giovani «soli e abbandonati», operando per fornirli di quella formazione umana e religiosa in grado di rendersi autosufficienti nella vita. L'avviamento al lavoro, corredato da buone basi scolastiche, rappresentò una bussola costante all'insegna di un'espressione cui ricorreva spesso: «Un mestiere è come una cascina su cui non grandina mai».

La pratica del lavoro era concepita come un esercizio particolarmente virtuoso nel quale si condensano principi educativi come la perseveranza, il desiderio del lavoro ben fatto, l'incanalamento positivo delle forze fisiche, il tutto immerso in un orizzonte fatto di vita sobria, di valori popolari, rispettosa delle gerarchie e delle regole sociali.

Occorrerà attendere il terzo volume di Giovenale Dotta sul primo costituirsi e il successivo sviluppo della congregazione dei padri Giuseppini per cogliere nella sua completezza la decisione di dar vita al sodalizio. Una decisione così impegnativa si posiziona infatti in un crocevia nel quale si incrociano ragioni legate a condizioni pratiche e a profonde motivazioni spirituali.

Fin d'ora si può sicuramente dire che



di fronte alla complessità ed ampiezza dei problemi giovanili e sociali era viva nel Murialdo la consapevolezza che non bastava – oggi diremmo – un generoso volontariato volto a far fronte alle esigenze immediate, ma occorreva rispondere anche con la modernizzazione degli strumenti messi in campo: non solo, dunque, una «carità soccorrevole», ma anche la «carità abilitante» e cioè una carità organizzata e duratura.

*Giorgio Chiosso*

**Luciana Bellatalla, Giovanni Genovesi, *La Grande Guerra. L'educazione in trappola*, Ariccia, Aracne, 2015, 271 pp.**

**Marnie Campagnaro, *La Grande Guerra raccontata ai ragazzi*, con saggi di Davide Boero, Ilaria Filograsso, Walter Fochesato e illustrazioni di Federico Maggioni, Roma, Donzelli, 2015, 201 pp.**

La ricorrenza del primo centenario dell'entrata in guerra dell'Italia ha rappresentato l'occasione propizia per la pubblicazione di questi due libri dedicati a illustrare l'impatto della grande tragedia ricompresa tra il 1914 il 1918 con il mondo dei bambini e dei giovani e con la vita della scuola.

Con i suoi 10 milioni di morti senza contare i civili, 20 milioni di feriti, mutilati e invalidi, il 12% dei caduti in età inferiore ai 20 anni e il 60% tra i 20 e i 30 anni la Grande Guerra ha rappresentato non solo la più immane carneficina di massa avvenuta in Europa negli ultimi tre secoli, ma anche la fine del mito della guerra purificatrice ed educatrice.

Questo mito, ricorrente nella storia, fu coltivato, come è noto, da molte élites liberali d'inizio secolo (non solo nazionalisti e futuristi, ma anche sinceri democratici come Giuseppe Lombardo Radice e Gaetano

Salvemini) che immaginarono la guerra come una «grande prova» offerta al popolo italiano per far diventare l'Italia davvero «nazione». Una specie di un gigantesco esperimento di pedagogia di massa: quello che fino ad allora non era riuscita a fare la scuola veniva ora tentato attraverso l'esperienza militare.

A tal fine non si rinunziò a nessuna forma di condizionamento e di propaganda. Dalla militanza bellicista imposta ai maestri per tenere saldo il cosiddetto «fronte interno» ai libri scolastici, dai testi per l'infanzia alla pubblicistica destinata ai bambini fino alle prime pellicole cinematografiche si registrò un susseguirsi di iniziative che in genere veicolarono una immagine di infanzia adultizzata, precocemente esposta alla vita e alle sue sofferenze tra cui spiccano l'abbandono e la solitudine.

I saggi raccolti nel volume curato da Marnie Campagnaro lo documentano con particolare attenzione in ordine alla letteratura per l'infanzia e per il cinema, mentre Luciana Bellatalla approfondisce la presenza dei sentimenti patriottici e bellicisti nei libri scolastici. Una visione dell'infanzia – sia detto *en passant* – in netta controtendenza rispetto alle conquiste che in quello stesso avvio del secolo stavano segnando la cultura pedagogica progressista, dal cenacolo ginevrino animato da Claparède e Ferrière alle esperienze statunitensi di John Dewey e dei suoi allievi.

Nel poderoso sforzo propagandistico furono chiamati a collaborare i migliori esperti della comunicazione di quegli anni: letterati e scrittori, illustratori e grafici, pedagogisti e uomini di scuola che seppero indubitabilmente dar vita a un gigantesco ed avvolgente «progetto educativo» che di «nazionale» aveva il linguaggio e le metafore e di prevaricazione nazionalistica aveva i contenuti.

Un progetto che, come annota Giovanni Genovesi, giungeva da lontano, da un Ri-

sorgimento interpretato come un religione laica sempre più intrisa di autoritarismo fino a ipotizzare l'identità di Stato etico e di Nazione. In questa prospettiva le dirigenze liberali furono ricorrentemente inclini a concepire i ceti subalterni come un costante pericolo, un popolo perciò più da indottrinare attraverso pratiche ideologiche che da coinvolgere ed educare secondo le regole democratiche. Un progetto, finita la guerra, destinato a prolungarsi nel fascismo che, non a caso, si autorappresentò come l'inveramento del Risorgimento incompiuto.

Il mito della «guerra educatrice» si infrange non solo nei milioni di vite spezzate – un'intera generazione dimezzata – ma nella miseria della vita quotidiana in trincea, nella indifferenza degli Alti Comandi per la vita dei soldati, nella crudeltà della disciplina.

Il «popolo buono», disciplinato, eroico che attraverso la guerra matura la matura consapevolezza di far parte di una comune identità nazionale è un progetto illusorio che non resiste alla prova dei fatti. «La crisi dell'umanità, infatti, non può che essere crisi della moralità e quindi, e prima di tutto, dell'educazione e di tutte le istituzioni che la rappresentano e che di essa si fanno carico» (Bellatalla-Genovesi, p. 237).

*Giorgio Chiosso*

**Carla Ghizzoni, *Scuola e lavoro a Milano fra Unità e fascismo. Le civiche Scuole serali e festive superiori (1861-1926)*, Lecce-Brescia, Pensa MultiMedia, 2014, 225 pp.**

L'ouvrage de Carla Ghizzoni est consacré aux Ecoles supérieures du soir et des jours fériés de la Commune de Milan entre l'Unité italienne et l'avènement du fascisme. Il présente en appendice des documents et des tableaux fort utiles. L'auteur avait déjà abordé partiellement le

sujet, le traitant jusqu'en 1915 seulement (*Le Scuole festive superiori femminili del Comune di Milano dall'Unità alla Grande guerra*, in C. Ghizzoni, S. Polenghi (a cura di), *L'altra metà della scuola. Educazione e lavoro delle donne tra Otto e Novecento*, Torino, Società Editrice Internazionale, 2008, pp. 185-214.)

Les Ecoles supérieures du soir et des jours fériés ont été organisées par la commune de Milan afin de dispenser une scolarité post-primaire à des jeunes gens et des jeunes filles qui souhaitaient améliorer leur situation professionnelle sans avoir les moyens de poursuivre des études secondaires. Carla Ghizzoni montre que ces écoles ont su s'adapter à l'évolution du monde du travail à la fin du XIX et au début du XX siècle. Elles proposaient une formation différente de celle des écoles techniques, conjuguant un enseignement de culture générale avec une préparation professionnelle. Leur caractère hybride les exposa aux critiques de ceux qui dénonçaient les ambitions des classes moyennes et populaires de trouver un emploi sans exercer d'activités manuelles. Ces établissements ont été créés en 1861 à l'initiative de la municipalité d'Antonio Beretta. Ils furent ouverts après les travaux préparatoires d'une commission présidée par l'adjoint aux Etudes Giovanni Visconti Venosta assisté de personnalités du monde culturel et scientifique lombard, comme Paolo Belgioioso et Giovanni Cantoni. La figure marquante de cette commission était sans doute Carlo Tenca qui avait participé aux insurrections de Milan avant de s'expatrier à Florence lors du retour des Autrichiens en Lombardie. Influencé par l'idéalisme de Mazzini et par le réalisme de Cattaneo, il était persuadé que la culture avait en elle-même des capacités éducatives. Tenca participa au renouveau du système scolaire milanais avant de siéger pendant de longues années au Conseil

Supérieur de l'Instruction publique. La scolarité des Ecoles supérieures du soir et des jours fériés durait 3 ans et elle était ouverte aux élèves ayant suivi l'école primaire élémentaire, certains d'entre eux exerçant un métier manuel dans la journée. Les programmes comportaient des enseignements de langue et littérature italienne, d'histoire et de géographie, d'arithmétique et de comptabilité, de dessin et de calligraphie ainsi que des notions des droits et devoirs des citoyens. Le succès de ces établissements fut immédiat et ne se démentit pas; mais les classes dirigeantes milanaïses souhaitaient les contrôler étroitement afin d'y exercer une surveillance morale pleine de vigilance.

Les distributions des prix le jour de la «fête du Statuto» donnaient lieu à des exhibitions gymniques et à des chants choraux. Elles étaient inaugurées par des discours qui soulignaient avec emphase la force émancipatrice de l'instruction dans l'Italie nouvelle; mais au moment des grèves ouvrières de la fin des années 1860 et du début des années 1870, les discours des prix insistaient sur les limites indispensables à apporter aux aspirations d'amélioration de la condition sociale des populations. L'instruction avait une fonction régulatrice de la liberté et les élèves se devaient d'éprouver de la gratitude envers l'administration municipale. En 1873, les Ecoles supérieures étaient peu fréquentées par les ouvriers pour qui elles avaient été créées. Elles attiraient davantage les commis et ceux qui aspiraient à exercer des emplois de comptables dans les entreprises. Les jeunes filles en particulier réclamaient des enseignements de français ainsi que des cours d'initiation aux activités commerciales. La municipalité les leur accorda; mais la faiblesse du niveau des élèves l'incita à créer une classe préparatoire pour améliorer leur culture de base de préférence à une 4<sup>e</sup> année d'enseignement. Néanmoins, l'introduction d'un enseigne-

ment d'économie moderne contribua à l'augmentation du nombre d'élèves qui passa de 350 au milieu des années 1860 à 850 en 1899. L'administration municipale restait préoccupée par leur éducation politique et morale au moment de l'émergence du socialisme et elle supprima l'enseignement d'économie moderne qui semblait présenter quelques caractères subversifs. Les élections municipales de 1899 portèrent au Palazzo Marino une majorité démocrate guidée par Giuseppe Mussi qui réforma profondément les Ecoles supérieures du soir et des jours fériés en 1902. Elles comportaient désormais deux cours différents, l'un de perfectionnement ouvrier en 3 ans et l'autre de type commercial en 4 ans. Les Règlements de 1905 et de 1912 furent l'aboutissement d'un travail d'un groupe d'enseignants. Ils étaient dirigés par Nicola Moreschi, fondateur de l'Institut technique milanais qui porte son nom et de l'Association des commerçants et industriels lombards. Le Règlement de 1912 reconduisit les deux sections, en ajoutant une 4<sup>e</sup> année d'études au cours de perfectionnement ouvrier. Le nombre d'élèves passa de 1359 à 3800 entre 1902 et 1914, la fréquentation du cours de perfectionnement ouvrier étant plus élevée que prévu.

L'Ecole supérieure féminin de Milan «Alessandro Manzoni» fut fondée en 1861 par Carlo Tenca. Elle s'ouvrait à des élèves âgées de 12 à 16 ans qui recevaient un enseignement de morale, de langue et littérature italienne, d'histoire et géographie, de langue française, ainsi que des notions de sciences physiques et naturelles, d'hygiène et économie domestique, d'arithmétique et comptabilité, de dessin et calligraphie. L'établissement eut du succès, avec 1200 demandes d'inscription; mais ses enseignements souffraient de l'inégalité du niveau culturel des élèves. La municipalité de Milan dut mettre à la disposition des filles issues des milieux po-

pulaires une «classe de complément» afin de suppléer aux lacunes de la loi Casati en matière d'instruction féminine post-primaire. De même, l'adjoint à l'Instruction publique Gaetano Negri fut à l'origine en 1875 d'une Ecole féminine de perfectionnement d'une durée de 3 ans destinée aux jeunes filles issues de milieux populaires et déjà entrées dans le monde du travail. Les familles appréciaient les Ecoles supérieures féminines des jours fériés dont le nombre d'élèves passa de 108 à 312 entre 1875 et 1889. Au début du XX siècle, la municipalité de Mussi modifia leur programme d'enseignement. Elle intensifia celui de la langue italienne, de la dactylo, de la comptabilité et du dessin pour répondre à une demande accrue de formation professionnelle des élèves. En 1912, deux orientations se dessinaient dans les Ecoles supérieures féminines, l'une à base d'enseignement du français et l'autre reposant sur l'italien et la comptabilité. Le succès de ces établissements ne se démentit pas et ils comptaient presque 5000 élèves en 1914. L'écrivain Anna Vertua Gentile, auteur de romans «bien pensants» peuplés de héros défenseurs de l'ordre social, avait été nommée inspectrice des Ecoles supérieures des jours fériés. A la veille de la Grande guerre, elle se félicitait de leur caractère hautement philanthropique destiné à faciliter l'accès des filles du peuple à des carrières modestes et louait un enseignement qui inculquait un sentiment de gratitude envers l'autorité.

La ville de Milan fut administrée de juillet 1914 à juillet 1920 par la municipalité socialiste d'Emilio Caldara. Très attaché aux autonomies locales, le maire de Milan ne s'opposa pas à la loi Daneo-Credaro qui étatisait l'enseignement primaire, les communes des grandes villes conservant l'administration de leurs écoles. L'adjoint aux Etudes secondaires et supérieures était l'écrivain Virgilio Brocchi qui écrira

la célèbre trilogie *La storia di Allegretto e Serenella* (1920-1921) et son édition scolaire illustrée par Duilio Cambellotti. Sa nouvelle *La giostra delle illusioni* dans le recueil *Fragilità* décrira sans complaisance en 1922 l'insolente incurie de l'administration scolaire italienne et les difficultés de carrière des enseignants du secondaire. Virgilio Brocchi nomma une commission chargée d'étudier le renouveau des Ecoles municipales sous la présidence d'une grande figure du socialisme réformiste Ugo Guido Mondolfo, professeur d'histoire et géographie au lycée «Berchet» et auteur de manuels scolaires réputés chez l'éditeur Signorelli. En février 1915, Brocchi désigna une commission spécifique pour réformer les Ecoles supérieures des jours fériés. Elle était présidée par Francesco Nicoli, inspecteur de ces établissements et enseignant de pédagogie à l'Ecole normale «Tenca» de Milan. Nicoli collaborait à «La Coltura popolare», organe de l'Unione italiana dell'educazione popolare. Ses études de pédagogie de l'enseignement primaire (*La scuola del popolo in Italia e i suoi immediati problemi*, Bologna, Zanichelli, 1920) s'inspiraient de Pestalozzi et manifestaient de l'intérêt pour la Scuola rinnovata, l'école nouvelle de Giuseppina Pizzigoni. Dans la commission de Nicoli figurait Maria Cleofe Pellegrini, directrice de l'Ecole normale milanaise «G. Agnesi», une militante de la cause féministe très engagée dans la défense des maîtresses d'asiles. Elle avait fondé en 1903 avec le soutien de l'Unione Magistrale Nazionale (U.M.N.), l'Unione Nazionale Educatrici d'Infanzia (U.N.E.I.) qui revendiquait le transfert des maîtresses d'asiles du ministère de l'Intérieur à celui de l'Instruction publique afin de leur reconnaître un statut d'institutrice. Inspectrice centrale au ministère, Cleofe Pellegrini était une ancienne collaboratrice de Luigi Credaro. D'autres personnalités du monde politique

et artistique, moins impliquées dans les problèmes scolaires, figuraient également dans la commission Nicoli. C'était le cas de Regina Terruzzi et de Margherita Saffatti. Deux tendances s'opposèrent au sein de la commission. La majorité composée de commissaires nommés par la municipalité dénonçait l'inadaptation des programmes des Ecoles supérieures du soir et des jours fériés aux besoins des classes populaires et aux nouvelles formes de la vie sociale. La minorité se recrutait parmi les enseignants et elle ne jugeait pas nécessaire une réforme fondamentale. Le différend portait sur le caractère des enseignements et la culture dispensée.

Les principales critiques venaient du secrétaire général de la Società Umanitaria Augusto Osimo qui jugeait un renouveau de l'éducation populaire indispensable au niveau de la formation technique, intellectuelle et morale (E. Decleva, *Etica del lavoro, socialismo, cultura popolare. Augusto Osimo e la Società Umanitaria*, Milano, FrancoAngeli, 1985). La réforme prolongea à 4 ans la durée des études, modifia l'enseignement de l'arithmétique à des fins plus pratiques et s'efforça de promouvoir une instruction et une didactique plus adaptées à la préparation professionnelle; mais la guerre fit chuter le nombre d'élèves à 2700 seulement en 1918.

La municipalité de Caldara fut remplacée par celle du socialiste maximaliste Angelo Filippetti à la fin de 1920, brutalement interrompue par l'occupation fasciste du Palazzo Marino pendant la «grève légalitaire» (août 1922); mais les Ecoles supérieures du soir et des jours fériés renouèrent avec le succès grâce à leur caractère hybride alliant formation culturelle et préparation professionnelle. Le marché du travail milanais était toujours plus demandeur d'employés et l'augmentation de leur nombre est estimée à 175% entre 1911 et 1921. Après les élections municipales

de décembre 1922, une majorité de libéraux, nationalistes et fascistes s'installa à l'Hôtel de ville sous la présidence de Luigi Mangiagalli. Professeur de médecine, Mangiagalli avait fondé en 1906 une des cliniques les plus modernes de Milan. Il oeuvra auprès du ministre Giovanni Gentile pour la création d'une université à Milan (1924) dont il fut le premier recteur. L'adjoint à l'Instruction publique, l'historien Giuseppe Gallavresi, appartenait à la Droite du libéralisme milanais. Proche du groupe catholique libéral de Gallarati Scotti et ami d'Alessandro Casati, il avait accompagné comme secrétaire la délégation italienne d'Orlando à la conférence de la paix à Paris en 1919. Gallavresi s'assura le concours de Francesco Nicoli qui s'efforça de conserver la spécificité des Ecoles supérieures du soir et des jours fériés. Leur mission de préparation des futures employées du secteur commercial ne fut pas remise en cause, mais beaucoup pensaient qu'elles devaient aussi former des mères de famille. Nicoli lui-même se disait déçu de voir tant d'ouvrières devenir employées de bureau. La volonté de les maintenir dans leur condition sociale et d'en faire de bonnes ménagères relevait d'une conception qui ne tenait pas compte de l'évolution de la ville et de la modernisation de ses activités. Faute de moyens et vu le petit nombre d'élèves inscrites, la Commune avait dû fermer l'Ecole des ménagères en 1918. Les élèves des Ecoles supérieures avaient toutes le «mirage de l'emploi administratif et commercial». L'administration municipale voulait conserver la mission d'éducation de la femme de ces établissements, tout en consolidant leur finalité professionnelle. A cet effet, les inspecteurs dénonçaient la trop grande importance accordée à la grammaire, aux narrations historiques et aux commentaires de poésies. L'enseignement de la langue italienne devait avoir un

caractère pratique et servir d'instrument aux futures employées de bureau. Les inspecteurs se plaignaient aussi de l'usage de manuels scolaires du secondaire, inadaptés aux Ecoles supérieures du soir et des jours fériés. L'avènement du fascisme ne remit pas en cause cette orientation. Le Règlement Gallavresi (1925) reprenait en effet la rationalisation des programmes initiée par les municipalités socialistes. Il ajoutait aux disciplines de la section commerciale (italien, calligraphie, comptabilité et français) un enseignement de sténographie, très utile aux futures employées du public et du privé.

Les Ecoles du soir et des jours fériés n'avaient pas d'objectif de promotion sociale. Elles répondaient à la conception du socialisme réformiste et de la bourgeoisie progressiste d'un prolétariat capable de dialoguer avec l'employeur et meublant son temps libre d'activités culturelles l'éloignant des vices et de l'alcool. Ces écoles étaient particulièrement appréciées par des jeunes qui se destinaient à des activités commerciales. Les sections industrielles étaient par contre trop théoriques pour s'ouvrir à une formation professionnelle. Leur inadaptation au marché local de l'emploi suscitait le désintérêt des artisans et des ouvriers à leur endroit. Les réticences de l'administration municipale milanaise à accepter la course des femmes à l'emploi tertiaire traduisait une idéalisation du travail de l'ouvrière d'usine au moment où le métier d'employée devenait un moyen d'émancipation féminine. Carla Ghizzoni écrit ainsi un ouvrage où l'éducation revêt toute sa dimension sociale. Elle évoque les répercussions de l'évolution économique sur l'emploi, l'émergence d'une émancipation féminine et un conflit de mentalités propre aux périodes de fortes mutations sociales.

*Michel Ostenc*

*Anna Ascenzi, Drammi privati e pubbliche virtù. La maestra italiana dell'Ottocento tra narrazione letteraria e cronaca giornalistica, Macerata, eum, 2012, 391 pp.*

L'auteur entend utiliser les réactions de la presse italienne des années 1880 au suicide d'une maîtresse d'école pour élargir le débat à une étude de la condition des institutrices dans la péninsule à la fin du XIX siècle. Le drame était double puisqu'il concernait non seulement le peu de considération dont jouissait la profession d'enseignant à l'époque, mais aussi la discrimination à l'égard de la femme, celle des classes humbles en particulier Anna Ascenzi s'appuie sur des textes parus entre 1880 et 1900 pour montrer l'évolution de la condition des institutrices pendant cette période. Ces documents sont reproduits en annexes dans la seconde partie de l'ouvrage.

Les écrits de l'écrivaine napolitaine Matilde Serao soulignent les faiblesses de la formation des institutrices. Elles entraient à l'École normale sans disposer des connaissances de base indispensables, les centres ruraux ne disposant pas d'établissements susceptibles de compléter leurs études après l'enseignement primaire «L'École normale» dispensait une culture générale, mais leur pédagogie se limitait à des valeurs morales et patriotiques étrangères à toute formation didactique. Un enseignement de catéchisme et d'histoire sainte s'avérait incapable de déboucher sur une réflexion collective à propos des thèmes abordés. Il contribuait à entretenir une image religieuse de la formation magistrale, la vocation enseignante restant considérée comme un don de Dieu en dépit des mesures de laïcisation de l'Instruction publique. Les Ecoles normales s'avéraient inadaptées à la lutte contre l'analphabétisme qui aurait dû être leur priorité. Elles s'obstinaient à dispenser un enseignement de travaux féminins dénué

de tout aspect technique qui reposait sur les lieux communs d'une distinction stricte entre les classes supérieures et celles des basses gens. Les inspectrices des écoles primaires chargées de vérifier le respect des programmes accomplissaient leur travail gratuitement comme un devoir de charité envers des filles pauvres. L'école populaire italienne semblait incapable de prendre en compte l'étendue de sa fonction sociale. La conception de la condition magistrale féminine de Matilde Serao s'éloignait par contre de toute vocation abstraite; elle reposait au contraire sur un engagement conscient de sa fragilité et de ses limites. La seule vocation authentique se réalisait à travers la difficile approche d'une vérité s'émancipant des stéréotypes et des préjugés. Dans *Il romanzo di un maestro* d'Edmondo De Amicis, la maîtresse d'école échappait à son destin en repoussant sa féminité pour se transformer en virago; mais l'image plus complexe de l'institutrice était celle d'une icône de l'abnégation et de l'esprit de sacrifice, une sorte de martyr laïque de l'instruction populaire et de l'émancipation féminine. Elle connaissait une fin heureuse, typique de la féerie des romans de De Amicis, qui n'enlevait rien à l'inexorable tristesse de son destin.

Les luttes pour l'émancipation des femmes ne présentaient aucun caractère révolutionnaire dans *Il romanzo di una maestra* d'Annetta Fusinetti (1891); mais la dimension chrétienne de la vie et l'image biblique de la justice immanente ne semblaient plus fournir les réponses à celles qui ne se résignaient pas à accepter leur dépendance. Le problème fondamental était de créer les conditions permettant à la nouvelle génération issue de la société industrielle moderne de s'adapter aux comportements et aux modes de pensée dominants. Dix ans plus tard *Il romanzo d'una maestra* d'Ida Baccini évoquait un univers très différent. L'auteur avait dû abandonner l'enseignement, son

fil unique étant né de père inconnu, et elle vivait de ses écrits de littérature pour l'enfance. Ses œuvres typiquement post-risorgimental restaient respectueuses des schémas sociaux et des traditions religieuses; mais les institutrices du début du XX siècle n'étaient plus les mêmes. Elles étaient issues de la petite bourgeoisie et avaient connu plus souvent la formation des Ecoles normales. Elles enseignaient dans leur localité d'origine et n'étaient plus victime du déracinement qui mettaient leurs aînées à la merci des édiles de villages de campagne. Elles menaient une existence plus aisée où la profession d'enseignante leur permettait de construire leur identité personnelle et d'assumer un rôle social. A l'époque où se formait la première organisation nationale d'enseignants (Unione Magistrale Nazionale), les institutrices italiennes connaissaient leurs droits et étaient prêtes à les faire respecter. L'ouvrage d'Anna Ascenzi annonce l'éclosion du féminisme en Italie qui remonte sans doute à la publication autobiographique de *Una donna* (1906) qui valut une réputation internationale à son auteur Sibilla Aleramo.

Michel Ostenc

**Mirella D'Ascenzo, *Col libro in mano. Maestri, editoria e vita scolastica tra Otto e Novecento*, Torino, Società Editrice Internazionale, 2013, 234 pp.**

Après quelques considérations portant sur les origines du manuel scolaire en Italie et sur les débats qu'il a suscités pendant le second après-guerre, le livre de Mirella D'Ascenzo s'attache à l'enseignement à Bologne au XIX siècle, un sujet dont elle est devenue la grande spécialiste. A l'aube de l'unité italienne, les idées libérales portées par les modérés et les radicaux de Bologne concernaient essentiellement une modernisation des structures et des

équipements économiques. L'insécurité et la misère régnaient dans la ville. Le développement des institutions éducatives pendant la Restauration fut moins lié aux projets centralisateurs du cardinal Consalvi qu'à la pluralité des initiatives locales. Dans la grande ville des Etats de l'Eglise, l'attitude tolérante du cardinal archevêque Oppizoni à l'égard des écoles privées permit de compenser les carences du secteur public, pendant que l'accent était mis sur l'éducation comme activité pastorale de l'Eglise. Les «scuole pie» proposaient un enseignement gratuit pour les garçons et adapté à leurs futures activités artisanales. La *Grammatica* la plus utilisée était celle de Gaetano Atti, un enseignant chevronné qui dirigera les écoles primaires de Bologne après l'unité. Les établissements de Camillo Minarelli introduisirent l'enseignement de la sténographie dans le cursus scolaire. Ils utilisèrent des enseignants de valeur comme Salvatore Muzzi, auteur de manuels scolaires largement diffusés sur le plan local. La personnalité la plus en vue de l'université de Bologne fut Pietro Siciliani qui devait contribuer à l'affirmation d'une pédagogie positiviste laïque à travers plusieurs revues d'éducation. Ses cours ouverts aux instituteurs encourageaient des expériences «autodidactiques».

Parmi les nombreuses initiatives éditoriales mentionnées par l'auteur, celles de Nicola Zanichelli étaient appelées à prendre une dimension nationale. Patriote proche du libéralisme de Cavour, Zanichelli sut saisir les opportunités que lui offrait la perspective de «faire les Italiens», largement répandue dans la classe dirigeante de l'époque. Il publia des *Dialogues* de Salvatore Muzzi et ses *Cento novelline e quattro nuovi racconti* qui atteignirent leur 29<sup>e</sup> édition en 1891. A côté de ces écrits à finalités instructives et morales, Zanichelli trouva chez Giosuè Carducci son auteur de prédilection. Dès

son arrivée à Bologne, l'écrivain avait noué des liens avec la culture radicale de la ville. Zanichelli publia les *Odi barbare* de Carducci dès 1877 et la Bologne de la seconde moitié du XIX<sup>e</sup> siècle tourna autour de la figure charismatique du poète. Les fonctions remplies par Carducci au ministère de l'Instruction publique lui inspirèrent les *Lettere italiane scelte e ordinate* (1883) et il publia en 1896 le 1<sup>o</sup> volume de ses *Lettere del Risorgimento italiane* destinées à l'enseignement secondaire. Les éditions Zanichelli multiplièrent les manuels destinés aux écoles du soir et aux écoles rurales. L'imprégnation positiviste fut une caractéristique de leurs productions éditoriales pendant cette période. L'un des auteurs les plus prisés par l'éditeur fut pourtant un catholique fervent Giovanni Federzoni; mais il s'adressait aux lycéens, s'efforçant de leur expliquer l'œuvre de Dante.

Pendant les premières années de l'unité, l'enseignement primaire comprenait à Bologne trois classes obligatoires donnant accès aux deux autres classes gratuites ou à des écoles du soir et des jours fériés. Les programmes prévoyaient de l'histoire sainte à la place du catéchisme, bientôt remplacée par les Devoirs de l'homme et du citoyen, l'apprentissage de la lecture, des notions d'histoire, de géographie, d'arts et métiers. Les manuels en usage comprenaient quelques «classiques» des écoles toscanes ou piémontaises ainsi que des auteurs locaux. Au début des années 1880, le président de l'influente société bolognaise des enseignants, l'ancien garibaldien Raffaele Belluzzi, mentionnait la laïcité et l'emploi correct de la langue italienne comme les critères essentiels des bons manuels scolaires. La société réclamait une révision régulière des titres, une attention plus vigilante portée à des éditions meilleur marché et le respect de critères stricts pour l'enseignement moral. A partir des années 1880, l'adoption du tos-



can comme langue nationale favorisa l'effacement des manuels scolaires turinois au profit d'ouvrages provenant de l'éditeur florentin Paggi. De nouveaux auteurs issus du milieu enseignant bolognais firent leur apparition dans les disciplines linguistiques, en histoire, en géographie et en arithmétique. Parmi eux figurait Alessandro Graziani, un instituteur qui acheva sa carrière comme inspecteur scolaire à Bologne, auteur des *Prime letture per fanciulletti*. Ce manuel faisait suite au syllabaire, en perfectionnant la méthode phonique. Il célébrait sur le mode épique un Risorgimento centré sur la triade: Cavour, Victor-Emmanuel II et Garibaldi. Mazzini figurait en éminence grise de ce panthéon national. Dans les *Scelti racconti di storia patria*, Graziani tentait d'échapper à la méthode traditionnelle des biographies illustrées pour établir un début de périodisation historique. Ces ouvrages magnifiaient l'histoire de Bologne dans une démarche campaniliste, mais aussi dans une perspective didactique destinée à susciter plus facilement l'intérêt des élèves.

Une nouvelle génération d'enseignants plus disciplinés et revendicatifs que leurs aînés fit son apparition au début du XX<sup>e</sup> siècle. Elle s'organisa autour de la Federazione Nazionale Insegnanti di Scuola Media (F.N.I.S.M.) et de l'Unione Magistrale Nazionale (U.M.N.). La poésie lyrique avait éloigné Giovanni Pascoli de Carducci auquel il succéda pourtant à l'université de Bologne. Chargé d'importantes fonctions au ministère de l'Instruction publique, Pascoli s'était opposé résolument à la place envahissante de la grammaire dans l'enseignement des lycées (programmes de 1894). Giulio Cesare Ferrari et Giuseppe Tarozzi incarnaient par contre une tradition positiviste de plus en plus dépassée par le néo-idéalisme de Benedetto Croce et le néo-positivisme de Federico Enriques. Ferrari fut un des pre-

miers en Italie à appliquer les principes de la psychologie à la pédagogie. Ses cours de psychologie expérimentale préparaient les instituteurs à enseigner aux enfants atteints. La philosophie de Tarozzi s'éloignait du déterminisme naturaliste pour fonder la vie morale sur la liberté et la responsabilité; sa réflexion pédagogique inspirée d'Herbart se situait à mi-chemin entre positivisme et spiritualisme. La pensée catholique n'était pourtant pas absente de Bologne où paraissait le quotidien «L'Avvenire». La pastorale de nouveaux ordres religieux comme les Petites Sœurs des Pauvres et les Salésiens était porteuse d'initiatives éducatives. Le modernisme catholique donna naissance à un mouvement proche de celui de Romulo Murri et le prêtre Alfonso Manaresi sera contraint d'abandonner son enseignement au séminaire de Bologne en 1912. L'éditeur Cappelli prit son essor pendant la Grande guerre avec une collection mineure «Enciclopedia scolastica»; mais il dut sa réussite à sa collaboration avec des universitaires comme le philosophe socialiste Rodolfo Mondolfo qui défendait la laïcité de l'enseignement secondaire. La réalisation majeure de Cappelli fut la publication de l'Opera Omnia d'Alfredo Oriani. Les succès des éditions scolaires de Zanichelli se poursuivirent pendant la dictature fasciste, notamment dans le domaine des langues classiques et avec les *Elementi di geometria* de Federigo Enriques.

Son immense richesse documentaire place l'ouvrage de Mirella D'Ascenzo parmi les livres de référence; mais il permet aussi de mieux cerner l'originalité d'une culture qui reste fortement teintée de particularisme. Certes, la priorité de la langue italienne conçue comme facteur d'unité nationale se doublait dans l'enseignement d'une formation civique et morale respectueuse des Devoirs plus que des Droits; mais l'intérêt des édiles pour la lutte contre

l'analphabétisme accompagnait les initiatives de la Ligue des enseignants et annonçait dès les années 1880 la vigueur des associations magistrales du début du XX<sup>e</sup> siècle. Le dynamisme de l'édition répondait à une demande de manuels scolaires mieux adaptés au contexte local. Il était lié à la contribution de grands auteurs qui incarnaient parfaitement la diversité de la culture de Bologne.

*Michel Ostenc*

**Fabio Targhetta, «Signor Maestro Onorandissimo». *Imparare a scrivere lettere nella scuola italiana tra Otto e Novecento*, Torino, Società Editrice Internazionale, 2013, 195 pp.**

La correspondance offre un corpus important à la recherche universitaire en linguistique; mais elle présente aussi des données d'histoire sociale souvent précieuses pour cerner les mentalités. Elle a donné lieu en Italie à des manuels épistolaires particulièrement nombreux à la fin du XIX<sup>e</sup> siècle avec les progrès de l'alphabétisation. Ces livres qui constituent le fonds d'un ouvrage passionnant de Fabio Targhetta s'adressaient à des personnes faiblement scolarisées et incapables de composer une simple lettre; mais ils étaient particulièrement utiles à des populations appelées à se déplacer pour des raisons économiques et les éditeurs devaient les adapter aux divers types sociaux de populations. En outre, une place significative était réservée à l'écriture épistolaire dans les manuels scolaires, ce qui confère à l'étude de Fabio Targhetta une précieuse dimension d'histoire de l'éducation; mais alors que les livres pour adultes destinés aux ouvriers et aux paysans faisaient référence aux types de la société bourgeoise auxquels ils étaient confrontés, les livres de

classes s'adressaient à des enfants qui appartenaient bien souvent à des catégories sociales privilégiées. Enfin, le texte d'une lettre offrait un terrain propice à la diffusion de messages éducatifs qui tendaient à imposer les règles d'une société bourgeoise dans l'Italie de la fin du XIX<sup>e</sup> siècle.

A travers ce corpus, l'auteur étudie le rôle de la langue nationale dans le processus de nationalisation des masses populaires italiennes. Ainsi, l'importance de la poésie à l'école sous forme de récitations apprises par cœur prend toute sa dimension dans l'urgence de «faire les Italiens», selon la célèbre formule de Massimo D'Azeglio. Les échos de ces progrès linguistiques au détriment des dialectes retentissaient dans le genre épistolaire, mais il fallut attendre la fin du XIX<sup>e</sup> siècle pour assister au triomphe des modernes sur les «puristes». La didactique de l'enseignement de l'italien insistait sur la composition par imitation et cette rhétorique ne sera abandonnée qu'au début du XX<sup>e</sup> siècle lorsque la pédagogie idéaliste lui préféra l'imagination inventive de l'enfant. La grammaire épistolaire de l'école primaire était si envahissante qu'elle ne laissait qu'une marge étroite de liberté à l'auteur, malgré les appels répétés des programmes au naturel et à la spontanéité. L'imitation ne se limitait pas aux formes grammaticales et au registre linguistique, mais s'étendait à la sphère morale. L'enseignement épistolaire italien était aussi un catalogue de bonnes mœurs. L'amour de la Patrie traité avec pudeur dans les programmes du Risorgimento évolua vers le nationalisme dès la fin du XIX<sup>e</sup> siècle; mais l'auteur s'attache surtout à la présence de la famille dans la correspondance. Les lettres des élèves pensionnaires montrent que l'internat était vécu sinon comme une punition, du moins comme un moyen de lutte contre l'indolence et la paresse. La famille existait au sens large, avec la

présence des grands parents, des oncles et des tantes. Les manuels diffusaient l'image d'une famille patriarcale comme antidote à la menace d'industrialisation et d'urbanisation. Les lettres instructives cédaient la place à un contenu moral envahissant fondé essentiellement sur la gratitude. L'étude de Fabio Targhetta dessine le profil d'enfants humbles, modestes et soumis. L'influence du christianisme était très présente, notamment au niveau du repentir, et la journée de l'écolier obéissait non seulement à la rigidité des règlements scolaires mais aussi à un code éthique inflexible. Il fallait supporter tout désagrément avec patience et le vivre avec courage en espérant dans la Providence.

Le XX siècle s'ouvrit sous le signe d'un renouveau pédagogique et didactique. Pour lutter contre la honteuse persistance de l'analphabétisme, on multiplia les écoles du soir et des jours fériés. La langue nationale connaissait une diffusion plus large et la femme occupait plus de place dans la correspondance, les modèles épistolaires leur étant destinés atteignant 38% du total pendant la Grande guerre. La mère restait la principale protagoniste de cette correspondance féminine pleine de repentir et de volonté d'expiation. Toutefois, le progrès technique et l'urbanisation surgissaient comme des nouveautés de la «Belle Epoque». Le voyage faisait son apparition avec la description des moyens de transport et les cartes postales constituaient des albums de vues de grandes villes. La correspondance s'emparait du thème du service militaire. Les soldats séparés de leur famille relataient les détails de leur formation à base de leçons de gymnastique. Les préoccupations hygiéniques et sanitaires envahissaient les manuels épistolaires afin de lutter contre la mortalité infantile mais aussi pour améliorer la santé d'un peuple appelé à former une armée vigoureuse. La tempérance et la modéra-

tion s'imposaient à un lecteur devenu le protagoniste du récit afin de se sentir plus concerné; mais le repentir et la confession des erreurs restaient les comportements moraux les plus répandus. Un autre thème significatif de cette production épistolaire était un parallèle entre le Risorgimento et la Première guerre mondiale considérés comme deux éléments fondateurs de l'identité nationale. Une place importante était réservée à la célébration des héros et au culte des morts pour la Patrie, le nationalisme transparaissant dans la rhétorique des lettres d'écoliers aux soldats du front. L'auteur montre de façon convaincante ce passage à une pédagogie de guerre fondée sur la transmission des valeurs: Obéissance, discipline, travail, honnêteté et sens de l'appartenance.

Fabio Targhetta a parfaitement senti le profond renouvellement qui présida à la réforme Gentile, l'enfant devenant l'objet principal d'une formation éducative. La correspondance des années 1920 fut caractérisée par un réalisme psychologique et une réelle capacité narrative du monde intérieur de l'enfant. Les nouveaux manuels véhiculaient des épisodes de la vie civile, religieuse et militaire qui traduisaient des élans généreux envers les autres. Ils se faisaient aussi l'écho du nationalisme et des tons martiaux de la Grande guerre, mais le message patriotique devenait moins important en cette période de libéralisme autoritaire. La véritable rupture survint au tournant des années 1930, l'auteur citant justement en exemple *Il balilla Vittorio* de Roberto Forges Davanzati, un manuel qui a laissé les traces les plus profondes dans la mémoire des écoliers de l'époque. La vie militaire représentait l'éthique principale du modèle fasciste, avec l'oncle paternel ancien combattant de retour d'Argentine jouant les mentors, et le recours personnel au duce s'imposant comme institution d'assistance. Un espace toujours plus

restreint fut réservé à cette littérature de correspondance dans les manuels après la Deuxième guerre mondiale.

L'ouvrage de Fabio Targhetta est novateur dans son recueil de l'héritage d'une littérature épistolaire, des manuels scolaires lui servant de guide et des textes des cahiers d'écoliers. Il permet de mieux appréhender les valeurs dominantes de la société italienne et leur évolution du XIX au XX siècle.

*Michel Ostenc*

**Carlo G. Lacaita, Enzo R. Laforgia (edd.), Luigi Ambrosoli e la storia d'Italia, Milano, FrancoAngeli, 2012, 192 pp.**

Cet ouvrage collectif consacré à l'œuvre historique de Luigi Ambrosoli comporte d'intéressantes études sur le catholicisme en Italie. Hostiles à la formation d'un Etat national qu'ils considéraient comme l'héritier de la Révolution française, les catholiques italiens mirent au point pendant les premiers temps de l'Unité une stratégie de pénétration de la société. Ils opposèrent leur enracinement séculaire dans la société de la péninsule à un Etat libéral né d'un Risorgimento bourgeois étranger aux masses populaires. Les positions intransigeantes de Pie IX conduisirent le Saint-Siège à rompre tout contact avec la politique italienne. Ambrosoli estimait que l'Eglise allait payer cet isolement non seulement de la perte de son pouvoir temporel mais aussi par contre coup d'un recul de son pouvoir spirituel. L'Etat libéral italien n'en rencontrait pas moins sur sa route un adversaire qui lui suscitait des difficultés internationales et l'hostilité interne des catholiques intransigeants.

La principale organisation de ces catholiques irréductibles fut l'Opera dei Congressi, née dès juin 1874. Dans une

première phase, ce mouvement considéra l'éducation comme une priorité au point de déroger à la consigne pontificale du «non expedit» pour préconiser une participation des catholiques aux élections locales afin de ne pas abandonner à ses adversaires une école publique gérée par les communes. Avec les lois du ministre Michele Coppino (1877) instaurant l'obligation scolaire, l'instruction religieuse était remplacée par un enseignement des Devoirs de l'Homme et du citoyen, même si diverses interprétations permirent de la considérer comme facultative. Les catholiques italiens furent alors incités à fonder leurs propres écoles en s'appuyant dans un premier temps sur les oratoires de Jean Bosco. L'Opera dei Congressi atteignit son plein essor après 1887, mettant l'accent sur l'action sociale et un corporatisme catholique dans la perspective ouverte par *Rerum Novarum*. Elle critiquait vivement les écoles publiques où elle défendait vigoureusement l'instruction religieuse et revendiquait la liberté de l'enseignement. Son principal animateur Giuseppe Tovini regroupait les enseignants catholiques dans une ligue et fondait les périodiques «Fede e Scuola» et «Scuola italiana moderna» pour les aider sur le plan pédagogique et didactique. A l'aube du XX siècle, des divisions profondes se manifestèrent au sein de l'Opera dei Congressi. Les intransigeants persistaient dans leur opposition aux institutions libérales du «pays légal» et menaient une action de défense sociale et religieuse auprès du «pays réel». Les plus jeunes regroupés autour de Romulo Murri entendaient transformer l'Opera dei Congressi en parti politique démocrate-chrétien. Pie X mettra fin à l'Opera dei Congressi en 1903. La pensée de Murri, suspendu «a divinis» en 1907 et excommunié en 1909, suscite toujours une certaine perplexité dans l'histoire officielle du monde catholique italien. Luigi Am-

brosoli ne voyait pas dans le programme de Murri un simple expédient pour combattre le socialisme, ni un prétexte pour relancer une politique cléricale intransigeante. Comme l'historien Pietro Scoppola, il insistait sur l'influence de Murri sur le futur fondateur du Parti Populaire Italien (P.P.I.) le prêtre sicilien Luigi Sturzo.

L'histoire du P.P.I. retenait l'attention d'Ambrosoli qui s'interrogeait sur «l'unité politique des catholiques». Cette théorie avait permis aux tendances cléricales et réactionnaires d'adhérer au parti de Sturzo, l'empêchant de représenter une démocratie chrétienne authentique comme l'auraient souhaité ses fondateurs. La personnalité de Luigi Sturzo restait au centre des débats. Selon Carlo Lemolo, l'échec du P.P.I. était lié au mysticisme de Sturzo qui rêvait d'un vaste mouvement catholique et social à vocation majoritaire. Pietro Scoppola estimait que le prêtre sicilien s'était trop consacré à l'action parlementaire à une époque (1919-1924) où la crise politique de l'Etat libéral privait cette institution de toute valeur. Sturzo envisageait une moralisation de la vie politique qui ne visait pas seulement le monde libéral compromis dans les manœuvres du «giolittisme», mais aussi l'Etat national. Il ne semblait pas réaliser la valeur de la Nation comme élément de base du monde moderne. Le «peuple» de Sturzo ne pouvait s'identifier à la «nation» italienne. Ambrosoli s'en tenait à des considérations politiques et ne cachait pas sa perplexité devant les positions de Sturzo, toujours hostiles à une ouverture vers le socialisme. Par contre, Ambrosoli observait la prudence de Sturzo devant les concessions faites à l'Eglise par la réforme scolaire de 1923 qui abandonnait la laïcité de l'Etat, concédait d'amples possibilités aux établissements privés et reconnaissait le rôle fondamental de l'enseignement de la religion à l'école primaire. Le prêtre si-

cilien considérait qu'il s'agissait de dispositions cléricales et il ne ménageait pas ses critiques sur la façon dont le fascisme les avait dénaturées.

Les positions d'Ambrosoli concernèrent ensuite les propositions catholiques des années 1970 concernant la révision du concordat. L'historien les rejetait en estimant qu'elles se contentaient de remplacer l'enseignement de la doctrine chrétienne, fondement et couronnement de l'instruction publique italienne selon les dispositions concordataires, par une référence au christianisme comme partie intégrante du patrimoine historique du peuple italien. Le problème civil sera partiellement résolu par le referendum sur le divorce de 1974, mais le fond du débat portait toujours sur l'enseignement de la religion à l'école publique. Ambrosoli s'opposera encore à tout financement public des établissements privés dans le cadre de conventions, le rôle de l'école d'Etat étant d'assurer une confrontation équitable entre tous les courants de pensée. Les jugements de l'historien sur le mouvement catholique italien rejoignaient ses préoccupations idéologiques. Il avait consacré d'autres études à la pensée de Mazzini et de Carlo Cattaneo, s'efforçant de dessiner les contours spécifiques d'un courant laïque italien authentique. Tel est le fondement même de la démarche historique de Luigi Ambrosoli.

*Michel Ostenc*

**Luigiaurelio Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, Macerata, eum, 2013, 451 pp.**

Les «petites universités» figurent souvent en Italie parmi les plus anciennes et leur longévité reflète l'image d'une forte tradi-

tion communale. L'histoire des universités de la péninsule a longtemps coïncidé avec elles; les grandes «Athénées» disposant de toutes les facultés et pourvues d'un nombre important d'étudiants se limitaient à celles de Naples, Bologne, Pavie, Turin et Pise. De la loi Casati (1859) à la réforme Gentile (1923), les débats sur les «petites universités» se multiplièrent. Une situation décevante au niveau de la recherche scientifique et de la formation des étudiants ravivait périodiquement dans certains secteurs des classes dirigeantes l'exigence d'une réorganisation du système universitaire qui impliquait la suppression des établissements les plus fragiles et les moins qualifiés; mais elle se heurtait régulièrement à une mobilisation des forces politiques et des personnalités locales ainsi que de larges couches de l'opinion publique bien décidés à défendre leur université. L'étude de l'université de Macerata ne présente donc pas qu'un intérêt local; elle conduit l'auteur à une réflexion sur les caractéristiques générales du système universitaire italien.

L'étude de Luigiaurelio Pomante est jalonnée par quelques étapes décisives, de la Bulle *Quod Divina Sapientia* aux réformes universitaires de la République italienne des années 1950-1960. La Bulle du 28 août 1824 réorganisait les études supérieures dans les Etats pontificaux en réservant la formation des classes dirigeantes aux seules universités de Rome et de Bologne; celles de Ferrare, Pérouse, Macerata, Camerino et Urbino étaient reléguées à un rôle mineur. Au lendemain de l'Unité italienne, la plupart des petites universités obtinrent une reconnaissance juridique de l'Etat, seules celles de Camerino, Ferrare, Pérouse et Urbino connaissant le statut des «universités libres». Le ministre Carlo Matteucci reconnaissait en 1862 le rôle central des autorités locales dans les enseignements primaire

et secondaire, l'instruction publique se contentant d'y exercer son contrôle; mais il préconisait une action gouvernementale directe sur l'enseignement supérieur chargé de la formation des élites du nouvel Etat. Matteucci entendait remédier à ses insuffisances par une centralisation qui regroupait dans quelques universités les meilleurs enseignants, les laboratoires les plus modernes et les bibliothèques les plus fournies. Le ministre établissait dans les universités d'Etat une distinction entre les établissements de premier et de second degré; mais ses propositions de suppression des universités mineures suscitérent des débats si vifs qu'elles furent abandonnées. En fait, la politique des «pareggiamenti» du ministre Michele Coppino permit de venir en aide aux universités mineures avec le concours financier des communes et des associations locales. Elle rompait avec l'étatisation pratiquée par les gouvernements de la «Droite historique» aux premiers temps de l'Unité.

La réforme Gentile de 1923 renforça les liens existant entre les universités mineures, les institutions locales et la réalité socio-économique des provinces. Elle établit une distinction entre les universités de type A qui possédaient toutes les facultés, celles de type B partiellement financées par l'Etat et celles qui restaient libres. La réforme Gentile créa ainsi une «double voie» dans l'enseignement supérieur, en confiant aux universités mineures le soin de se spécialiser dans des activités scientifiques en liaison avec la demande locale. L'action du ministre Cesare De Vecchi renoua avec l'étatisme, en instaurant en 1935 une centralisation absolue du système universitaire. Elle supprima toute distinction entre les universités d'Etat qui annexèrent les Instituts d'Etudes Supérieures sous forme de nouvelles facultés de Sciences politiques, d'Economie, de Commerce, d'Ingénieurs ou d'Agrono-

mie. Les gouvernements de la République inversèrent la tendance pendant les années 1950-1960 en octroyant l'autonomie aux universités dans le cadre d'une politique de décentralisation. Il en résulta une multiplication des sièges annexes d'universités déjà existantes et la création de nouvelles universités privées.

L'ouvrage de Luigiaurelio Pomante ne s'arrête pas aux seules dispositions ministérielles. Il s'intéresse aussi aux structures scientifiques, aux bibliothèques et aux étudiants. Il permet ainsi de mieux connaître le rôle spécifique de l'université de Macerata dans le cadre d'une petite ville dynamique et de comprendre la nature du prestige dont jouissaient les enseignants à l'intérieur d'une notabilité aux caractéristiques spécifiques. L'étude montre enfin le rôle de l'université de Macerata comme lieu d'échange d'une science qui, au lendemain de l'Unité italienne, voulait être une science nationale.

*Michel Ostenc*

**Mario Gecchele, *Momenti di storia dell'istruzione in Italia*, Lecce-Brescia, Pensa MultiMedia, 2014, 441 pp.**

L'ouvrage abondamment illustré de Mario Gecchele s'articule en deux parties. La seconde décrit le parcours législatif de l'école italienne aux XIX et XX siècles. La première présente au lecteur des recherches approfondies d'histoire de l'éducation depuis les réformes du despotisme éclairé en Italie sous domination autrichienne jusqu'à nos jours. Cette démarche à caractère exhaustif s'organise autour de plusieurs thèmes essentiels : L'affirmation de l'école publique, l'école pour le peuple, l'enseignement et la didactique entre autoritarisme et activisme, la réforme scolaire idéaliste, la figure et la formation du

maître, l'enseignement de la religion et la laïcité de l'Etat, les manuels scolaires, l'école de la petite enfance et celle destinée aux handicapés.

L'affirmation de l'école d'Etat en Italie à la fin du XVIII siècle ne s'inscrit pas dans une politique anticléricale liée à la suppression des Jésuites. La nouvelle législation ne contestait pas le lien existant entre l'Eglise et l'Etat, les pratiques religieuses restant obligatoires dans l'enseignement public. L'illumination italienne fut beaucoup moins radical que les lumières françaises et il s'accommoda du despotisme éclairé des Bourbons à Naples ou des Habsbourg en Lombardie et Vénétie. Au-delà de fins idéales comme le réveil de la pensée ou la diffusion de l'instruction, les réformes josphistes étaient destinées à renforcer le pouvoir en place en formant des fonctionnaires serviteurs zélés de la monarchie et à se ménager le soutien de l'opinion publique. Dans le royaume de Naples, les Lumières insistèrent sur le lien entre l'instruction et l'économie, l'activité productive contribuant à l'élévation culturelle des populations. L'auteur s'attarde sur le règlement de 1774 qui rénovait l'école de l'empire des Habsbourg jusqu'en Lombardie. Le despotisme éclairé concevait l'école en fonction de l'Etat et comme un moyen de diffusion de l'idéologie du pouvoir. Il agissait à travers une centralisation administrative exercée par des inspecteurs scolaires. Dans ces établissements, l'enseignement religieux conservait toute son importance comme élément de lutte contre la désintégration sociale.

Mario Gecchele est un spécialiste de cette période (*Fedeli sudditi e buoni cristiani: la rivoluzione scolastica di fine Settecento tra la Lombardia austriaca e la Serenissima*, Verona, Mazziana, 2000). Il montre toute l'importance du renouveau didactique dû à l'abbé Giovanni Felbiger, artisan de la réforme des écoles primaires

dans l'empire autrichien. La formation des maîtres permit de faire évoluer la condition magistrale. Avant les réformes scolaires du XVIII<sup>e</sup> siècle, les enseignants étaient des mercenaires, souvent ignorants, utilisant le même abécédaire pour des élèves entassés dans des locaux insalubres. L'enseignement relevait du bon vouloir du maître et la méthode utilisée changeait avec les établissements. Les réformes vont permettre d'instruire les futurs maîtres dans des écoles normales (Grammaire, économie domestique, notions d'histoire, de physique et de sciences naturelles, principes de géométrie, de mécanique et de dessin). La religion était dispensée par des ecclésiastiques et les autres disciplines par des laïques. Les études étaient évaluées par des examens publics avec des jurys mixtes composés d'enseignants laïques et d'ecclésiastiques. L'auteur montre clairement tout ce que l'école italienne doit aux réformes illuministes du XVIII<sup>e</sup> siècle et le peu d'impact laissé par la domination française et napoléonienne.

Le retour de l'Autriche en Lombardie après la chute de Napoléon se traduit par une reprise de la politique josphiste, mais avec un renforcement de la confessionnalisation des études destinée à s'opposer à la diffusion des idées révolutionnaires dans le peuple. Au début du XIX<sup>e</sup> siècle, Federico Confalonieri fut l'un des artisans de la diffusion de l'enseignement mutuel lancastérien en Lombardie. Il en attendait une formation de la jeunesse à ses devoirs (dévouement au souverain et à la patrie), mais aussi l'acquisition de notions d'agriculture et de commerce. L'intérêt de Confalonieri pour l'instruction du peuple était motivé par des considérations politiques, mais aussi par la conviction que le développement économique exigeait une main d'œuvre pourvue d'un savoir élémentaire dispensé par l'école primaire. Le progrès économique stimule-

rait l'indépendance italienne: l'autonomie économique porterait à l'autonomie politique. L'Autriche s'inquiéta d'une action d'éducation qui servait de terrain d'action politique à des philanthropes. Elle mit fin à l'expérience de l'enseignement mutuel en Lombardie (janvier 1821). L'abbé Giuseppe Bagutti avait été l'un des premiers maîtres d'enseignement mutuel à Milan. Il avait publié le *Saggio sulle scuole di mutuo insegnamento* (1820). Il se consacra à l'enseignement des sourds-muets après s'être initié à cet apostolat à Gênes auprès de l'institut dirigé par Ottavio Assarotti. L'enseignement mutuel respectait le système scolaire des classes, mais le maître avait recours à des moniteurs choisis parmi les élèves plus âgés pour enseigner la lecture, l'écriture et l'arithmétique aux plus jeunes. Les écoliers écrivaient avec leur doigt dans le sable, puis avec la craie au tableau noir et enfin avec une plume sur du papier. Les écoles d'enseignement mutuel instruisaient le peuple et considéraient que tous les hommes étaient égaux. Elles furent interdites dans le royaume des Deux-Siciles (21 décembre 1819) et dans les États pontificaux (25 septembre 1825). La «méthode normale» préconisée par la réforme josphiste prévoyait un enseignement collectif destiné à tous les élèves pour éviter des pertes de temps. La «méthode des lettres» consistait en une lecture en commun. On écrivait au tableau noir la première lettre de chaque mot ou de chaque phrase que l'élève devait apprendre par cœur. La méthode de l'interrogation ne consistait pas à donner immédiatement la bonne réponse à l'élève mais à permettre d'évaluer son degré d'assimilation des notions acquises. La «méthode normale» se répandit très lentement du fait de l'absentéisme scolaire et de l'insuffisance de la formation des maîtres. En Lombardie, elle fut diffusée par le directeur des écoles Francesco Soave qui



s'opposait à la Révolution française et défendait une philosophie empirique. Soave devait multiplier les manuels scolaires de langue italienne.

Au lendemain de l'Unité, les programmes d'enseignement primaire d'Aristide Gabelli (1888) se contentèrent d'innovations méthodologiques positivistes fondées sur le concret sans proposer une théorie de l'école, la pénétration de l'intelligence passant toujours par les disciplines traditionnelles. L'inspiration positiviste concevait l'école comme un exercice d'observation des faits et sa pratique reposait sur des musées didactiques. Les programmes de Francesco Orestano (1905) lui ajoutèrent des leçons de choses basées sur la botanique; mais les écoles italiennes étaient dépourvues du matériel didactique indispensable à la réussite d'un tel projet. Au début du XX<sup>e</sup> siècle, de nouvelles philosophies faisaient leur apparition réévaluant l'action, la volonté et les éléments spiritualistes. L'idéalisme actualiste réagissait contre l'individualisme des Lumières et dénonçait le formalisme du positivisme qui n'offrait à l'observation qu'une illusion du réel. Ces nouvelles philosophies accusaient le déterminisme positiviste d'annuler la liberté de l'homme et d'en ignorer les diverses formes de devenir. Rosa Agazzi critiquait les musées didactiques où des animaux empaillés donnaient une idée fautive de la réalité de la vie. Pour le pédagogue Giuseppe Lombardo-Radice, seul le maître était juge de présenter sa leçon comme une conversation ou l'exposition du sujet.

La réforme Gentile de 1923 répondait aux exigences philosophiques de l'idéalisme actualiste. Elle rénovait profondément une école primaire encombrée de savoirs encyclopédiques et de méthodes sclérosées pour rendre à l'enfant sa spontanéité créative; mais cette démarche d'auto-éducation restait respectueuse de

l'autorité du maître. L'«école sereine» s'adressait avant tout à la conscience éducative de l'enseignant. L'auteur lui reproche la sévérité de son système hiérarchique et son absence d'ouverture sociale; mais il ne montre pas suffisamment que l'enseignement de la religion était conçu par Gentile dans un sens historique comme en témoignent les travaux d'Adolfo Omodeo. L'Eglise en fera un catéchisme. La réforme provoqua un profond renouveau de l'école italienne, l'enfant devenant l'objet d'un dialogue de formation morale et éducative. L'auteur montre bien la déformation de l'œuvre scolaire de Gentile par la dictature fasciste.

Le chapitre dédié à la condition des instituteurs et à leur formation occupe une place essentielle dans l'ouvrage de Mario Gecchele. Les réformes de la fin du XVIII<sup>e</sup> siècle exigeaient un cours de préparation du maître et une habilitation à l'enseignement. Elles créaient à cet effet une Ecole normale dans chaque province de Lombardie et soulignaient la nécessité de la laïcité de l'enseignement. Les rapports de Giovanni Bovara à Vienne lui valurent le poste de «réformateur général des écoles». Critique envers l'enseignement des Jésuites, partisan d'une philosophie empirique comparable à celle de Francesco Soave, Bovara préconisait le développement des études scientifiques et la nécessité d'une extension de l'instruction populaire. Au lendemain de l'Unité, l'Italie souffrait de l'insuffisance du nombre de maîtres laïques. Ils n'étaient que 17 000, alors qu'il en fallait 60 000 pour lutter contre un analphabétisme s'élevant à 72% des hommes et 84% des femmes. Ce besoin croissant d'instituteurs n'empêchait pas la persistance du caractère mystique de la mission d'enseignant qui était préjudiciable à sa formation professionnelle. La dimension éthico-religieuse restait l'un des axes porteurs de l'action magistrale. Une

lente évolution se dessina à la fin du XIX siècle, les enseignants laïques devenant plus nombreux que les ecclésiastiques. En outre, la fonction se féminisait. En 1895, l'Italie comptait 19,000 instituteurs pour 36,000 institutrices.

L'auteur suit l'évolution de la préparation des maîtres à travers les trois étapes de l'Ecole normale, de l'Institut magistral et de la formation universitaire. L'instituteur issu de l'Ecole normale du XIX siècle devait être un exemple de probité, de civisme et de respect envers l'autorité. La pédagogie s'inspirait de textes de l'abbé Antonio Rayneri et de ses *Primi principi di metodica* qui séparaient la formation des qualités intellectuelles de l'éducation proprement dite. Les Ecoles normales utilisaient le *Corso di pedagogia per i maestri di grado inferiore* de Paolo Vecchia encore imprégné de spiritualisme libéralisant. Cette formation magistrale peu soucieuse de profession enseignante insistait sur l'éducation plus que sur l'instruction. Au début du X siècle, le métier d'instituteur évoluait vers une profession correspondant à une activité intellectuelle et à des compétences scientifiques. Une loi de 1903 exigeait que les maîtres fussent désignés par concours. Leur image professionnelle s'améliorait avec l'apparition d'associations magistrales. Des Ecoles pédagogiques s'ouvraient dans les universités pour former des inspecteurs scolaires et les directeurs didactiques. L'éducation devenait une science après être longtemps passée pour un art. L'Institut magistral créé par la réforme de 1923 était conçu comme un «lycée mineur». L'éducation ne pouvait se réduire à une technique et le maître était un «missionnaire de l'esprit». La meilleure préparation magistrale était d'ordre culturel. Après la Deuxième guerre mondiale, les programmes de 1945 faisaient du maître un exemple de probité investi d'une responsabilité d'instruction civique.

La nécessité d'une formation universitaire s'imposait pour les instituteurs et après une période d'expérimentation (1973), la loi du 19 novembre 1990 créait pour eux une licence à caractère culturel et professionnel. Un lycée des Sciences sociales leur ouvrait sa section psychopédagogique qui leur proposait un apprentissage en laboratoire didactique.

L'ouvrage de Mario Gecchele consacre un important chapitre à l'enseignement de la religion et à la laïcité de l'Etat. La première tentative d'affirmation de la laïcité en matière scolaire se manifesta au Piémont avec la loi Boncompagni (octobre 1848). Elle décrétait l'obligation scolaire de l'Etat, affirmait son intention d'éliminer l'influence excessive de l'Eglise et fixait le cadre général d'une instruction publique destinée à former la conscience civique des citoyens. Le concordat de 1855 entre la monarchie autrichienne et le Saint-Siège exigeait par contre une instruction conforme à la religion de maîtres catholiques. En dépit des plébiscites qui l'accompagnèrent, le nouvel Etat du royaume d'Italie se présenta comme une conquête de la péninsule par les élites piémontaises. L'idéologie libérale dominante était laïciste et autoritaire; mais elle s'opposait à l'Eglise sur un plan juridique plus que doctrinaire. Au début des années 1870, l'influence de la franc-maçonnerie et du positivisme contribua à donner l'image d'un Etat laïque, la laïcité étant un moyen de chasser la religion catholique de l'école publique. Ainsi, les Facultés de théologie furent supprimées dans les universités (1873) et l'enseignement de la religion abandonné dans les Ecoles normales (1879). La loi Coppino (1877) sur l'obligation scolaire remplaça l'instruction religieuse à l'école primaire par celle des «Devoirs de l'homme et du citoyen»; mais les décrets d'application se contentèrent de rendre l'enseignement de la religion facul-

tatif. Une nouvelle période s'ouvrit avec la prise de conscience par les catholiques de l'importance des problèmes sociaux et de la diffusion de l'instruction dans le peuple. La fracture se creusait entre les pouvoirs spirituel et temporel dans une logique positiviste destinée à se débarrasser de la religion au nom d'une éducation scientifique. Le congrès de la «Pia Opera per la diffusione della fede» (1890) incita les catholiques à créer des écoles et des patronages, l'encyclique *Rerum novarum* (1891) multipliant les associations destinées à christianiser la société. Dans le domaine de l'enseignement, les catholiques des publications comme *Scuola e fede* (1892) et *Scuola italiana moderna* (1893) appelées à un grand rayonnement, les enseignants se regroupant au sein de l'association «Nicolò Tommaseo» (1906). La bataille laïque se poursuivait au congrès de la Fédération des Enseignants du Secondaire (F.N.I.S.M.) qui se prononçait à Naples pour la suppression de l'enseignement de la religion à l'école publique (septembre 1907). L'année suivante, la motion Bissoleti réaffirmait à la Chambre des députés la caractère laïque de l'école primaire; mais le décret Rava (février 1908) confirmait le caractère facultatif de l'enseignement de la religion. La période fasciste de l'entre-deux-guerres fut au contraire caractérisée par un accord entre l'Eglise et l'Etat (accords du Latran, 1929). La Constitution de la République italienne fut le résultat d'un compromis entre le catholicisme et le communisme. Le concordat de 1929 était maintenu, mais l'école primaire accueillait les suggestions des pédagogues laïques. Le débat porta ensuite sur une défense acharnée de l'école publique contre l'enseignement privé mené avec des arguments laïcistes dans des revues comme «Scuola e Città». Le nouveau concordat (février 1984) impliquait de nouvelles dispositions au niveau de l'enseignement de la religion

dans les écoles publiques. Beaucoup de catholiques acceptaient d'ailleurs qu'elle se résumât à la simple connaissance de faits religieux. La laïcité s'insurge contre le dogme; mais elle exige un débat ouvert à la critique réciproque. Elle s'assimile à la tolérance et trouve toute sa place dans une école laïque ouverte au pluralisme et parfaitement compatible avec la religion.

Dans l'Italie de la Restauration, les manuels scolaires se confondaient souvent avec la littérature pour l'enfance; les recueils de nouvelles et de fables étaient les premiers livres utilisés dans les écoles. En Lombardie, ils étaient l'œuvre de Francesco Soave et de l'abbé Giuseppe Taverna qui enseignait à Parme. En Toscane, Raffaele Lambruschini publiait des ouvrages destinés aux instituteurs. Surintendant des écoles primaires de Gênes, Vincenzo Troya rédigeait des manuels de grammaire, de lecture et d'arithmétique. Autour des années 1840, Pietro Thouar multipliait les biographies de personnages historiques afin d'éveiller la conscience nationale des Italiens; mais le manuel le plus diffusé fut le *Giannetto* de Luigi Parravicini. L'ouvrage exaltait le travail des manufactures et l'essor de l'agriculture dans une action moralisatrice destinée à la rédemption d'un peuple corrompu. Il respectait des règles typiques d'ascension sociale, le fils de petit commerçant devenant artisan, puis industriel. Parravicini réservait l'éducation privée aux familles et attribuait l'éducation scolaire à l'école. Chaque citoyen avait le droit et le devoir de cultiver toutes ses facultés physiques, intellectuelles et morales, et l'Etat l'obligation de les lui garantir. L'art de l'éducation découlait de l'application pratique d'une science de l'éducation élaborée en fonction des facultés de l'individu. Parravicini souhaitait une alphabétisation permettant au citoyen d'exercer ses droits civiques et politiques dans une école pu-

blique débarrassée de la présence d'enseignants ecclésiastiques.

La diffusion de l'école publique stimula la production des manuels scolaires dans la 2<sup>e</sup> moitié du XIX siècle. Les ouvrages mettaient en scène des enfants modèles, agissant dans le respect des règles de bonne conduite. L'auteur cite en particulier les livres de Michele Lessona et de Gustavo Strafforello. Le premier, professeur de zoologie et d'anatomie comparée à l'université de Turin, était le traducteur des œuvres de Darwin. Son livre *Volere e potere* (1869) faisait l'éloge de l'esprit d'entreprise dans une version sécularisée du calvinisme qui s'insérait dans la politique de la nouvelle Italie inculquant au peuple le sens du devoir et l'esprit de sacrifice. Gustavo Strafforello traduisait le livre *Self help* de Samuel Smiles, imbu des idées libérales et individualistes de l'école de Manchester. (*Chi s'aiuta, Dio l'aiuta*) (1865). Politiquement modéré, partisan de la science et du rationnel, Strafforello publiait des ouvrages sur les thèmes du progrès et de l'industrie qui incitaient le peuple au travail, à l'humilité et au sacrifice. A partir des années 1870, les enseignants devinrent plus nombreux parmi les auteurs de manuels scolaires qui abordaient les nouveaux thèmes de l'hygiène publique, de la gymnastique et de l'impérialisme colonial italien; mais des écrivains montraient aussi de l'intérêt pour l'école. L'auteur cite en particulier *Il bel paese* de l'abbé Antonio Stoppani, professeur de géologie à l'université de Pavie: le livre imprégné des idées de Rosmini décrivait les beautés naturelles de l'Italie et il fut adopté dans les écoles pour son culte de la patrie. Le roman *Cuore* d'Edmondo De Amicis rencontra par contre un immense succès dans le public, mais pas comme livre de classe.

Dans le sillage de la réforme scolaire de 1923, la commission des livres scolaires présidée par Giuseppe Lombardo-Radice

donna naissance à de nouveaux manuels. Les maximes destinées à impressionner les enfants furent remplacées par des récits plus proches de la réalité quotidienne. Les livres de classe considéraient désormais l'enfant avec plus d'indulgence et de compréhension, s'attachant à son monde intérieur et appréciant sa spontanéité naturelle. Le livre de lecture devait être divertissant, donner le goût de la lecture et l'appétit du savoir. La commission permit l'utilisation de textes plus proches de la psychologie des enfants. Les récits gagnaient en vivacité, s'attachant aux progrès de l'esprit civique et aux conquêtes des masses populaires. Les textes mêlaient des tendances conservatrices et des initiatives modernes caractéristiques des périodes de grandes mutations sociales. Le succès de ces manuels des années 1920 dépassa le cadre de l'école pour en faire de véritables albums de famille. A partir de 1928, la commission des livres scolaires présidée par le vice-président du Parti National fasciste Alessandro Melchiori préconisa leur remplacement par des livres d'Etat imprégnés de militarisme et du culte du duc dans l'esprit totalitaire de la dictature.

Mario Gecchele consacre un important chapitre à l'école de la petite enfance. Dans la pensée de Ferrante Aporti, les facultés humaines concernaient les aspects physiques, les capacités intellectuelles et l'affectivité morale. La pédagogie des asiles ouverts par Aporti à Crémone (1828) s'inspirait de la méthode de l'«Infant School» de Samuel Wilderspin. Il s'agissait de lutter contre la perversion matérielle et morale du milieu social. Les asiles d'Aporti comprenaient 3 sections ouvertes à des enfants âgés de 3 à 6 ans qui dispensaient des enseignements intellectuels et religieux différents. L'étude de l'arithmétique utilisait le boulier dans des applications aux choses sensibles de la vie courante. Ces écoles se répandirent

en Toscane puis en Lombardie; mais leurs implications politiques et sociales les rendirent suspectes dans le royaume des Deux-Siciles et elles furent interdites dans les Etats pontificaux (1837). On reprochait aux asiles d'Aporti d'accueillir trop d'enfants et de les instruire avec la pédagogie contestable des questions appelant des réponses collectives en chœur. L'apprentissage prématuré de la lecture et de l'écriture relevait en outre d'un pur didactisme. Les asiles d'Aporti s'opposaient aux jardins d'enfants de Froebel qui privilégiaient une éducation esthétique en récupérant la spontanéité de l'élève dans des activités expressives. Le jeu préparait à l'enseignement primaire sans passer par les exercices de numération et d'apprentissage des asiles d'Aporti. La pédagogie de Froebel eut un grand retentissement en Italie pour sa dimension spiritualiste, même si l'Eglise critiquait le caractère artificiel des jardins d'enfants. Une «Lega d'insegnamento» fut chargée d'en assurer la diffusion jusqu'à la fin des années 1870. Fondateur des premiers jardins d'enfants à Milan, Vincenzo De Castro reconnaissait à Froebel le mérite d'avoir dépassé la distinction entre instruction et éducation, comblant le fossé entre la théorie et la pratique. Le positivisme se prononça en sa faveur; mais il n'était pas question de germaniser l'Italie. En 1889, 74% des asiles utilisaient une méthode mixte, plus adaptée à la tradition italienne.

A l'aube du XX siècle, l'Italie héritait d'une double tradition. L'école de la liberté des sœurs Agazzi se rattachait à la spiritualité catholique pendant que l'école de Méthode de Maria Montessori était d'imprégnation positiviste et scientiste. Dès 1898, Rosa Agazzi dénonçait le formalisme mécanique des jardins d'enfants s'inspirant des méthodes de Froebel. Le respect de la spontanéité de l'enfant devait obéir à une méthode naturelle, le jeu se

pratiquer en plein air dans un milieu propice au chant et à l'exercice de la langue parlée. Le matériel didactique était par contre un accessoire essentiel de la Maison des enfants de Maria Montessori. Il devait permettre l'éveil de la vie psychique de l'enfant et l'éducation de ses instincts afin de contribuer à l'épanouissement de sa personnalité. L'école de l'enfance fut confiée à l'enseignement privé, l'école maternelle d'Etat n'apparaissant en Italie qu'en 1968; mais la réforme de l'école maternelle du ministre démocrate-chrétien Ferrari Aggradi insistait sur une éducation religieuse destinée à développer des rapports fraternels entre les enfants. L'école maternelle complétait un système scolaire dont les autres degrés étaient conçus dans une optique très différente et l'ensemble apparaissait totalement désarticulé. En 1991, les *Orientamenti dell'attività didattica* du ministre Giovanni Galloni insistaient sur le rôle de l'école maternelle dans la formation intégrale de l'enfant. Elle devait favoriser son identité personnelle, développer son sens de la solidarité et de la justice, permettre l'expression de ses perceptions motrices et linguistiques. A l'image de l'école primaire des années 1990, l'école maternelle devenait un champ d'expérience. En 2003, l'école de l'enfance était englobée dans un premier cycle d'enseignement qui comprenait l'école primaire et l'école secondaire unique. Cette unité était renforcée par la suppression de l'examen de passage de l'école primaire à l'école secondaire de premier degré, dernier barrage subsistant au sein du premier cycle. L'enseignement de l'école maternelle devait reposer sur des expériences concrètes ignorant les apprentissages formels des exercices scolaires. Il valorisait le jeu et le contact avec la nature.

Le chapitre consacré à la scolarisation des handicapés est un des plus neufs de

l'ouvrage de Mario Gecchele. En 1898, Clodomiro Bonfigli fut un des artisans de la fondation à Rome de la «Lega nazionale per la protezione dei fanciulli deficienti». Directeur de plusieurs asiles d'aliénés, Bonfigli créa un institut médico-pédagogique à Rome (1901) qui vint en aide à l'Ecole magistrale orthophonique pour former les premiers enseignants spécialisés pour handicapés mentaux. Bonfigli fut à l'origine de classes spéciales pour enfants attardés instituées dans les écoles avec l'aide du ministre de l'Instruction publique Guido Baccelli. Le psychologue Ferruccio Montesano s'imposait comme un autre pionnier de l'enseignement pour enfants inadaptés. Il fonda avec le ministre Baccelli la «Lega nazionale per la protezione del fanciullo» (1901) qui éditait la revue «L'assistenza dei minorenni anormali» (1913). En Italie, les éducateurs de sourds-muets firent prévaloir la méthode orale de préférence au langage des signes (Congrès international de Milan en 1880). L'intérêt pour les aveugles reçut une impulsion décisive au lendemain de la Grande guerre avec la création à Gênes de l'«Unione Italiana Ciechi» (octobre 1920). L'apport pédagogique essentiel venait d'Augusto Romagnoli qui fut le premier professeur aveugle à enseigner la philosophie au lycée. Il se fit le promoteur d'une éducation scientifique des non voyants et fonda la Société des enseignants aveugles en 1910. Augusto Romagnoli fut un ardent partisan de l'obligation scolaire pour les aveugles qui fut inscrite dans la loi ainsi que celle des sourds-muets par Giovanni Gentile (31 décembre 1923). Romagnoli dirigea ensuite à Rome la première Ecole de Méthode pour éducateurs aveugles. L'auteur aurait pu citer également l'action menée par Lavinia Sacerdote Mondolfo qui accueillit des soldats aveugles, invalides de guerre, dans l'institut qu'elle dirigeait à Milan (1916-1923) en leur offrant

des possibilités de réinsertion professionnelle. L'Ente Nazionale Sordomuti (1932) parvint à organiser une industrie capable d'employer un millier d'handicapés dans diverses activités artisanales du cuir et du papier. Après la Deuxième guerre mondiale, une loi de 1952 envoya les enfants aveugles dans des établissements spécialisés ou dans des écoles disposant de classes pour les accueillir avec des enseignants titulaires du diplôme délivré par l'Ecole de Méthode de Rome. Cette politique fut poursuivie dans les années 1960, tous les enfants présentant des anomalies étant envoyés dans des établissements spécialisés dont le nombre passa de 1 000 à 6 000 entre 1962 et 1970.

L'auteur considère que la Déclaration de l'ONU sur les Droits des handicapés mentaux (21 décembre 1971) provoqua un tournant dans la politique qui leur était réservée en Italie. La Déclaration insistait sur l'égalité des droits, au niveau de l'instruction, de la formation professionnelle, de l'assistance médicale et de la participation aux activités récréatives. Le rapport de la sénatrice Franca Falcucci (1975) demanda que les handicapés aient accès à toutes les écoles, les structures spécialisées étant réservées aux seuls enfants souffrant de troubles sensoriels et psychiques graves. Une politique d'intégration remplaça le système de ségrégation antérieur. Toutefois, en 1978 et 1979, la législation précisa les dispositions concernant les cours de soutien destinés aux élèves en difficulté et la compétence des enseignants habilités à les dispenser. La loi-cadre 104 de 1992 sanctionna le passage d'un état d'assistance à un état social pour handicapés. Elle prévoyait le développement de la recherche scientifique en matière génétique et psychopédagogique afin d'assurer l'intégration sociale des handicapés en réaffirmant leurs droits. Les limites de cette intégration résidaient dans l'interprétation

du concept. On passa ainsi d'une adaptation du sujet handicapé aux exigences de la société à une adaptation du système scolaire au sujet handicapé. Au début du XXI<sup>e</sup> siècle, l'intégration scolaire des handicapés évolua vers l'inclusion, afin de ré-actualiser l'idéal de Don Milani d'une «école pour tous et pour chacun».

*Michel Ostenc*

**Gabriella D'Aprile, *Adolphe Ferrière e les oubliés della scuola attiva in Italia*, Pisa, ETS, 2010, 268 pp.**

L'ouvrage de Gabriella d'Aprile est consacré au pédagogue suisse Adolphe Ferrière ainsi qu'à diverses expériences d'écoles actives en Italie. L'auteur insiste sur la matrice théorique biogénétique des premières réflexions de Ferrière, ses efforts pour élaborer des types psychologiques étant empreints d'influence évolutionniste. De telles origines serviront d'argument aux critiques des pédagogues conservateurs qui dénonceront la pédagogie des «Ecoles mythes» fondée sur la spontanéité créative de l'enfant. En réalité, Ferrière accueillait également les conceptions spiritualistes du début du XX<sup>e</sup> siècle, véhiculées par Bergson et William James. Sa psychologie était conçue comme une étude du dynamisme profond de l'esprit humain dont le progrès social devait tenir compte. Elle insistait moins sur l'être que sur son devenir. La vie humaine se présentait comme un effort incessant vers le progrès, mais ce processus évolutif n'obéissait pas à un mécanisme déterminé. Il progressait en fonction des expériences vécues par l'individu qui modifiaient la transmission des caractères acquis. L'éducation devait en conséquence permettre à l'enfant non seulement d'extérioriser son potentiel biologique, mais aussi de manifester ses ca-

pacités novatrices afin de parvenir à son développement intégral. La vocation de Ferrière était née au sein de l'Institut Jean-Jacques Rousseau d'Edouard Claparède à Genève, même si le pédagogue n'avait pas la stature de Jean Piaget. La surdité l'éloignant de la condition enseignante, il milita au sein de la Ligue internationale pour l'Education nouvelle dont il devint l'un des porte-paroles. Ferrière entendait stimuler la curiosité et l'intérêt de l'enfant en le libérant de l'encyclopédisme prôné par les méthodes traditionnelles. Son nom était associé à celui d'une école active qui trouvait ses limites dans son empirisme expérimental, au moment où Claparède entendait rénover la pédagogie sur des bases scientifiques.

L'auteur s'interroge sur les raisons de la faible présence de l'école active en Italie. Ses principes d'auto-éducation étaient pourtant présents dans la réforme Gentile de 1923 où le pédagogue Giuseppe Lombardo-Radice entendait libérer l'enfant à l'école primaire; mais ils se heurtèrent à un corps enseignant indifférent, voire hostile. Les maîtres en ignorèrent l'esprit pour n'en adopter que certaines applications idéologiques. On aurait aimé que Gabriella D'Aprile s'étendit davantage sur l'immanence de la philosophie de Gentile qui fut vivement combattue par l'Eglise non seulement au niveau de l'enseignement mais aussi dans la culture italienne. Le principal représentant des méthodes actives en Italie fut le pédagogue Giuseppe Lombardo-Radice, principal interlocuteur de Ferrière dans la péninsule. En fait, «l'école sereine» de Lombardo-Radice s'inspirait largement d'expériences pédagogiques antérieures trop souvent passées sous silence. On peut citer l'Ecole de la Montesca, l'école rurale d'Alice et Léopold Franchetti, les journaux d'écoliers de Maria Boschetti Alberti à Muzzano, la «Rinnovata» de Pizzigoni, les écoles

de l'Agro Romano de Giovanni Cena et la méthode de Rosa Agazzi. L'auteur évoque des initiatives ultérieures de pédagogues qu'elle range parmi les «oubliés» de l'école active: Maurilio Salvoni et ses recherches sur l'éducation de l'activité spontanée dans la province de Milan, les expériences d'écoles de plein air de Michele Crimi en Sicile, les écoles-jardins des Piccoli Fabre di Portomaggiore de Rina et Ida Nigrisoli et les écoles-laboratoires de Virginia Povegliano Lorenzetto à Rome. Gabriella D'Aprile consacre une intéressante étude aux initiatives pédagogiques du naturaliste Davide Levi Morenos consacrées aux colonies de jeunes travailleurs et aux navires-écoles. Les premières rassemblaient vers 1920 une majorité d'orphelins de guerre qui recevaient une formation professionnelle agricole. Le mythe de la terre et d'une vie simple cherchait un équilibre entre discipline et liberté. Le navire-école «Caracciolo» ancré à Naples sera à l'origine d'écoles professionnelles destinées aux mécaniciens, électriciens et radio-télégraphistes de la Marine.

Gabriella D'Aprile souligne à juste titre l'atmosphère familiale qui présidait à ces innovations pédagogiques. L'activité scolaire y obéissait moins à des critères didactiques d'avant-garde qu'à la conscience éducative de l'enseignant. Elle ignorait l'organisation scientifique et matérielle des méthodes de Montessori. Une place importante était réservée au dessin spontané et aux conversations de plein air. La multiplication des stéréotypes a occulté la richesse des initiatives pédagogiques italiennes du début du XX siècle et l'intérêt de leurs innovations.

*Michel Ostenc*

**Luigiaurelio Pomante, «Fiducia nell'uomo e nell'intelligenza umana». La Fede-**

**razione Universitaria Cattolica Italiana (F.U.C.I.) dalle origini al '68, Macerata, eum, 2015, 406 pp.**

L'histoire de la Federazione Universitaria Cattolica Italiana (F.U.C.I.) est bien connue grâce aux ouvrages de Maria Cristina Giuntella, de Gabriella Marcucci Fanello, de Renato Moro et de Francesco Malgeri. L'auteur se propose de l'évoquer à nouveau, mais en approfondissant l'étude des réactions de l'association étudiante face à la politique universitaire, notamment pendant la période de reconstruction du second après-guerre dans les années 1950-1960. Il s'y emploie en utilisant de nombreux fonds documentaires, en particulier les archives de la Présidence de la F.U.C.I. conservées auprès de l'Institut Paul VI à Rome qui possèdent les actes des colloques annuels de cette association.

L'auteur rappelle comment, en dépit du rejet d'un nationalisme incompatible avec les principes chrétiens, beaucoup de jeunes catholiques italiens furent emportés par la vague patriotique de 1915. La F.U.C.I. dut affronter les multiples problèmes du premier après-guerre et elle fut confrontée à la crise des valeurs morales qui secoua toute la jeunesse européenne. Le président de l'organisation Giuseppe Spataro était aussi vice-président du Parti Populaire Italien (P.P.I.) de Luigi Sturzo et il invita les étudiants catholiques à participer davantage à la vie universitaire de leur pays. L'engagement des catholiques s'étendit aux enseignants et aux licenciés avec la création de deux organisations spécifiques («Docenti Universitari Cattolici» et «Laureati Cattolici»). Pour la première fois de son existence, la F.U.C.I. fut invitée à réfléchir à un renouveau du système académique. Elle s'ouvrit aux organisations catholiques étrangères et accentua la formation militante de ses adhérents; mais elle se heurta aux réticences



de l'Action catholique dont elle dépendait et qui redoutait ses velléités autonomistes.

Avec l'accession de Mussolini au pouvoir, la F.U.C.I. subit les attaques des fascistes intransigeants et elle dut préserver son indépendance menacée par les organisations étudiantes du nouveau régime. La nomination de Gian Battista Montini comme assistant ecclésiastique et celle d'Iginio Righetti à la présidence de l'organisation, considérés tous les deux comme des «hommes du Vatican», marqua la fin de la période antérieure et l'insertion totale de la F.U.C.I. dans les rangs de l'Action catholique. La Fédération étudiante dut suivre un programme de discipline morale et spirituelle étranger à tout engagement politique, mais orienté vers une prise de conscience intellectuelle et sociale. Le Concordat de 1929 semblait ouvrir une période de détente et pouvait ouvrir de nouvelles perspectives; mais la crise de l'Action catholique (1929-1931) montra que le régime fasciste entendait s'assurer l'exclusivité de la formation de la jeunesse italienne et la F.U.C.I. dut se réfugier dans une prudente réserve.

Après une longue période de consensus ponctuée d'une adhésion sans failles à la politique suivie pendant la conquête de l'Ethiopie et la guerre d'Espagne, l'histoire de la F.U.C.I. connut un tournant en 1939. La présidence d'Aldo Moro symbolisait l'arrivée d'une nouvelle génération de catholiques élevés pendant la dictature et participant pleinement à la vie des institutions universitaires du régime fasciste; mais ces jeunes gens témoignaient de leur attachement à leur foi en émettant des réserves à l'égard des positions les plus radicales du parti fasciste. Ils défendaient un catholicisme pontifical romain, tout en préconisant dans la ligne tracée par Montini son insertion dans les formes les plus avancées de la société industrielle. Aldo Moro s'efforça d'affirmer davantage la

présence de la F.U.C.I. dans l'université et lui donna une nouvelle dimension religieuse fondée sur l'engagement personnel et la responsabilité de l'homme moderne. La déclaration de guerre du 10 juin 1940 fut accueillie avec un élan patriotique de commande; mais l'organisation étudiante affirma une présence chrétienne parmi les combattants afin qu'un engagement moral et spirituel pût survivre à l'effondrement politique et social qui se profilait et servir à la reconstruction du pays. Aldo Moro revendiquait un enseignement plus proche de la vie permettant à l'université de retrouver sa fonction éducatrice. Le mandat de Giulio Andreotti (1942-1944) à la présidence de l'organisation étudiante fut caractérisée par une forte empreinte sociale qui dénonçait un embourgeoisement en complète négation des principes évangéliques. Tout en s'opposant aux campagnes de propagande fasciste destinées à susciter la haine de l'ennemi, la F.U.C.I. ne pouvait souhaiter une défaite qui signifiait la mort de tant de jeunes Italiens; mais en agissant sur les consciences, elle réussit à former une génération de jeunes catholiques dont la diversité des orientations n'empêchait pas une communion d'idéal.

La F.U.C.I. participa à la reconstruction civique et morale du pays qui culmina, d'après l'auteur, avec l'accession de De Gasperi au pouvoir. La «longue marche» de l'organisation étudiante à travers le fascisme avait rompu ses liens avec le mouvement démocratique et elle revendiqua auprès de l'Eglise des principes idéologiques susceptibles de permettre au catholicisme d'asseoir son emprise sur de larges couches de la société. L'Italie devait compter au cours des décennies de l'après-guerre 3 présidents de la République, 7 présidents du Conseil et un nombre considérable de ministres formés dans l'organisation de jeunesse universitaire catholique; mais pendant que le «Movimen-

to laureati» (Licenciés) fournissait une grande partie des militants politiques de la Démocratie chrétienne, la F.U.C.I. choisit une orientation plus pédagogique et religieuse. L'auteur accorde une importance fondatrice à l'enquête ordonnée par le ministre démocrate-chrétien Guido Gonella pour la réforme de l'Ecole. L'Université occupa ainsi une place essentielle dans les débats de la F.U.C.I. en 1948. La situation n'était plus celle du premier après-guerre où les catholiques étaient minoritaires et se heurtaient à des positions libérales et anticléricales dominantes. La classe politique italienne était désormais convaincue de la nécessité pour l'Université de renouer avec sa vocation de formation des élites de la Nation.

Les travaux de la Commission pour la réforme de l'Ecole ont été déjà étudiés par Giorgio Chiosso, Luciano Pazzaglia et Roberto Sani. L'auteur complète ces ouvrages classiques par un examen approfondi des communications présentées aux colloques annuels de la F.U.C.I. La nouvelle génération des années 1950 cherchait une adaptation de l'enseignement aux bouleversements sociaux-économiques qui transformaient profondément l'Italie. L'organisation étudiante chercha à faire prévaloir cette orientation en développant l'esprit associatif parmi les étudiants, en dehors de tout engagement politique, tout en préconisant une sélection plus sévère afin de rendre à l'université son caractère formateur, abandonné au profit d'une «boutique à diplômes». La F.U.C.I. de Romolo Pietrobelli se vit reprocher un élitisme et un esprit théorique qui l'incitèrent à chercher des solutions plus concrètes aux problèmes universitaires. Elle mena d'importantes enquêtes qui permirent de souligner en 1957 l'insuffisance du niveau des connaissances en Sciences humaines et sociales, l'incapacité de l'université à concilier la recherche scientifique et la for-

mation professionnelle et enfin une crise de la culture liée au manque d'unité du savoir.

Les années 1950 s'achevaient sur la plan décennal de l'Ecole du gouvernement d'Amintore Fanfani (1958) qui mettait fin à une décennie de gestion «par voie administrative» faite d'aménagements ponctuels. La création de nouvelles universités au cours des années 1960 devait améliorer la démocratisation du savoir et contribuer à sortir les régions méridionales de leur isolement économique et culturel; mais elles servirent les intérêts des forces politiques locales sans satisfaire la demande d'instruction supérieure des populations. Elles contribuèrent à une fragmentation du système universitaire et à l'augmentation de ses dépenses sans contrepartie au niveau de son efficacité. La F.U.C.I. en était consciente et, en dépit de ses liens avec la Démocratie chrétienne, elle critiquait l'incapacité des gouvernements de centre-gauche à gérer correctement l'université. Les propositions du ministre Luigi Gui, et notamment une nouvelle organisation de la recherche et de la didactique dans les départements universitaires, échouèrent lamentablement devant le Parlement et l'organisation étudiante catholique déplorait l'absence des choix drastiques indispensables.

Au tournant des années 1960, sous la présidence d'Enrico Peyretti, la F.U.C.I. prêta une attention particulière au rapport entre l'université et la vie religieuse. L'organisation étudiante rentra dans l'orbite de l'Action catholique et renonçait aux ouvertures culturelles qui lui avaient valu nombre d'adhérents les années précédentes. Elle se coupait de la réalité universitaire en attendant la grave crise qui devait la frapper dans la seconde moitié des années 1960. La F.U.C.I. qui avait su auparavant anticiper l'évènement dut se contenter de subir les effets du concile Va-

tican II. Certes, à l'invitation du pape Paul VI, ses dirigeants manifestèrent leur intention de s'intéresser à nouveau à la réforme de l'université; mais ils continuèrent à privilégier l'expérience religieuse. La F.U.C.I. se trouva ainsi dans l'incapacité de jouer son rôle modérateur traditionnel lorsque la contestation étudiante de 1968 posa le problème du recours à la violence pour sortir de la légalité. Le nombre de ses adhérents s'effondra, diminuant de 80 à 90% dans plusieurs universités. La crise de 1968 fut à l'origine d'un processus éloignant la jeunesse de l'Eglise et accentuant la laïcisation de la société italienne.

L'ouvrage s'achève sur un riche appendice documentaire relatif aux années du second après-guerre qui éclaire et complète le texte. Les précieuses analyses de Luigiaurelio Pomante permettent de mieux comprendre l'échec des réformes scolaires italiennes du second après-guerre et l'incapacité des organisations catholiques à les faire aboutir.

*Michel Ostenc*

**Nelly Valsangiacomo, Marco Marcacci (a cura di), *Per tutti e per ciascuno. La scuola pubblica nel cantone Ticino dall'Ottocento ai giorni nostri*, Locarno, A. Dadò, 2015, 343 pp.**

Il volume si segnala anzitutto in quanto viene a colmare un evidente vuoto storiografico. Esistono infatti studi su educatori ticinesi, come Franscini o la Boschetti Alberti, o su celebri intellettuali residenti in Ticino come Cattaneo, o su singole scuole, quali il Liceo di Lugano, ma uno studio complessivo, che ricostruisca la storia della scuola del cantone negli ultimi 200 anni, ancora mancava, dopo il volume del 1959, *Storia della scuola ticinese*, di Felice Rossi. *Per tutti e per ciascuno* è curato da

Nelly Valsangiacomo, ordinario di storia contemporanea nell'Ateneo di Losanna, e autrice dell'introduzione, e da Marco Marcacci, autore di numerose pubblicazioni di storia svizzera. Il testo ha un impianto solido ed è fondato su una vasta documentazione di fonti d'archivio e a stampa, messa in luce da diversi autori, che non sono accademici ma che vantano una sicura competenza archivistica ed euristica. La Società Demopedeutica ha sostenuto la pubblicazione, con lungimirante azione culturale, documentata dalla presentazione del suo presidente, Lauro Degiorgi, che apre il volume, dopo la prefazione di Manuele Bertoli, Consigliere di Stato, Direttore del Dipartimento dell'educazione, della cultura e dello sport, che giustamente rimarca il ruolo della scuola nella costruzione dell'identità nazionale e nel processo di democratizzazione della società.

I primi tre interventi, di Marcacci stesso, di Fabrizio Mena, autore anch'egli di numerosi pregevoli lavori (su Franscini e sull'editoria ticinese in particolare), e di Nicoletta Solcà, responsabile dell'Archivio Amministrativo della Città di Lugano, ricostruiscono l'evoluzione del sistema scolastico del cantone. Questa prima parte, di carattere istituzionale, colloca le vicende scolastiche all'interno della storia politica ed economico-sociale del cantone e costituisce un primo ineludibile riferimento, per chi vorrà approfondire singole tematiche. La figura di Franscini, con la sua opera di modernizzazione del sistema scolastico, riceve il giusto risalto, all'interno anche del dibattito sul metodo didattico che nei primi dell'Ottocento percorreva la pedagogia europea (normale, socratico, lancasteriano). La questione della formazione dei maestri, legata a quella del metodo, fu sviluppata da Luigi Antonio Parravicini, l'autore del *Giannetto*, che inaugurò nel 1837 a Bellinzona

il primo corso di metodica. Nel Liceo di Lugano insegnavano Carlo Cattaneo e Giovanni Cantoni: per tutta la prima metà dell'Ottocento, forte fu il legame con la Lombardia austriaca, che trasmise un modello didattico e dalla quale emigrarono, come è noto, diversi intellettuali, esuli politici, che si rifugiarono appunto nel vicino Cantone. Per converso, diverse famiglie ticinesi inviarono i figli all'Università di Pavia, fino a che le leggi austriache vietarono l'iscrizione a stranieri, per ragioni politiche. Favorito dalla comune lingua italiana, lo scambio culturale e pedagogico comunque proseguì e si mantenne negli anni dell'Italia unita (basti ricordare il positivo giudizio sulla Boschetti Alberti espresso da Giuseppe Lombardo Radice).

Le vicende politiche del cantone, con l'alternanza al potere di liberali e di cattolici conservatori, ebbero riflessi sul sistema scolastico: dalla secolarizzazione avviata nel 1852 dai liberali, sostenitori della laicità dell'insegnamento, alla «ricattolicizzazione» del 1877 (ma non mancavano docenti che conservavano manuali definiti «irreligiosi», nonostante le prescrizioni, p. 77). Nuovamente al governo nel 1890, i liberali imposero il cosiddetto metodo oggettivo delle «lezioni di cose», in auge in Europa, sulla scia del successo del Positivismo.

Il lavoro minorile, ancora alle soglie del nuovo secolo, ostacolava l'attuazione dell'obbligo e molte aule erano ancora inadeguate. Via via però la struttura della scuola pubblica venne a semplificarsi nel corso del XX secolo, come ben illustrano i grafici che corredano questa parte. Nel 1974 fu istituita la scuola media unica di 4 anni. Il volume documenta come il passaggio da una civiltà rurale ad un'economia del terziario ebbe ripercussioni in campo scolastico, con l'accesso a studi secondari di più ampi strati della popolazione nel corso del Novecento. Spazio è

pure dedicato all'importante capitolo delle scuole professionali. Questa parte, che giunge ai giorni nostri, mette pure in luce le problematiche e le difficoltà degli ultimi decenni, dalla formazione degli insegnanti alla questione delle scuole private.

Nel 1914, quindi molto presto, la legge sull'istruzione pubblica abilitò lo Stato ad aprire scuole speciali: un tema, questo della storia dell'istruzione per bambini disabili e dell'integrazione, che sicuramente merita, anche per il Canton Ticino, di essere affrontato in ulteriori studi.

La seconda parte del libro è composta da sei saggi tematici. La scelta degli argomenti è interessante e corrisponde a indirizzi attuali della ricerca storico-educativa: architettura ed educazione; le docenti donne; l'associazionismo magistrale; l'educazione igienica e sessuale; radio, TV e scuola; i quaderni scolastici. Si rileva però l'assenza del tema dei periodici magistrali e della manualistica scolastica, talora accennato (p. 213) ma non affrontato, anche se si tratta di uno dei temi sui quali da qualche decennio è puntata l'attenzione della storiografia educativa europea, laddove più recente è l'interesse per i quaderni di scuola o per l'architettura scolastica, temi che lodevolmente il volume propone. Simona Martinoli, docente all'Accademia di architettura di Mendrisio, è autrice del saggio, molto documentato e ben argomentato, su 150 anni di architettura scolastica nel Canton Ticino, nel corso dei quali si passò da costruzioni molto sobrie, semplici ed anonime al neoclassicismo e a facciate imponenti, per giungere alla ricerca di uno spazio a misura di bambino. L'autrice documenta inoltre la grande differenza tra scuola di città e istituti di campagna. Utile è l'apparato iconografico che illustra il testo.

Il saggio di Lisa Fornara sull'identità di genere e il lavoro magistrale è ricco di spunti che meriteranno approfondi-

menti successivi, basti pensare al fatto che per legge, dal 1934 al 1971 le maestre non potevano sposarsi, se volevano conservare il posto di lavoro; oppure si pensi al tema delle maestre cattoliche o delle emancipazioniste «trasgressive» (p. 215). Anche il saggio di Alberto Gandolla sull'associazionismo mostra come le condizioni salariali dei docenti (e delle donne in particolare) fossero misere, almeno sino agli anni Cinquanta del secolo scorso.

La ricerca di Rosario Talarico documenta, tra le altre cose, come ancora ai primi del Novecento fosse diffuso il timore dell'onanismo, con argomentazioni che echeggiavano quelle settecentesche del dottor Tissot, e illustra le sperimentazioni recenti di educazione sessuale. Interessante il saggio di Nicoletta Solcà sull'educazione e i media: il Cantone risulta all'avanguardia sotto il profilo dell'innovazione didattica e dei media, avendo sin dal 1920 un Ufficio per le Proiezioni luminose, ed avendo istituito dal 1934 Radioscuola, poi Radiotelescuola, che offriva ai ragazzi lezioni a distanza (obbligatorie). L'esperienza, cessata nel 1993, è significativa e merita essa pure ulteriori studi. Infine, Alessandro Frigeri esamina l'insegnamento a Lugano dal 1935 al 1945 attraverso un corpus di 121 quaderni scolastici, che consente di documentare da un lato una didattica imperniata intorno all'attivismo pedagogico, dall'altra la forte presenza di contenuti disciplinanti e patriottici. Come si è detto, sarebbe utile incrociare queste fonti con i manuali adottati dai maestri e con altre fonti (diari, autobiografie di maestri) per arricchire il quadro. Ma questi sono suggerimenti per successive ricerche, giacché, come detto, il volume lodevolmente presenta un quadro ampio e ben fondato di 200 anni di storia e costituisce un punto di partenza per successive ricerche (anche sulla scuola privata), ed è utile particolarmente per gli storici dei cantoni

e dei paesi vicini (Italia in primo luogo). Da menzionare, infine, il bell'apparato iconografico e l'utile cronologia della storia della scuola ticinese (1803-2011) che completano il volume.

*Simonetta Polenghi*

**Flores Reggiani, *Sotto le ali della colomba. Famiglie assistenziali e relazioni di genere a Milano dall'Età moderna alla restaurazione*, Roma, Viella, 2014, 384 pp.**

Flores Reggiani, autrice di significativi lavori sull'assistenza e l'abbandono infantile a Milano in età moderna, da tempo attenta curatrice dell'Archivio storico del Brevotrofeo di Milano, ha consegnato alle stampe questo volume, che presenta il frutto di anni di intense ed accurate ricerche. Interamente condotto sulla scorta di meticolose indagini archivistiche, il volume presenta un lucido affresco, di lunga durata, sulla storia dell'Ospedale Maggiore di Milano, con un'originalità di approccio euristico. Il testo, infatti, non è una storia istituzionale del grande ente ospedaliero ambrosiano, né è una storia dell'esposizione milanese – temi già trattati nella storiografia, basti ricordare i lavori di Edoardo Bressan, di Giorgio Cosmacini o di Volker Hunecke. La prospettiva di Reggiani è, invece, quella di ricostruire il sistema di relazioni tra l'ente assistenziale e le esposte: lo sguardo, quindi, non è sulle balie e sulle famiglie «esterne», ma sulla famiglia «interna», ovvero sul sistema di accoglienza delle esposte, non solo all'atto dell'abbandono, ma negli anni successivi. Reggiani quindi indaga le modalità di tutela delle ragazze abbandonate messe in atto dall'Ospedale Maggiore in circa più di tre secoli, evidenziando i momenti di cambiamento in una storia di lunga durata e presentando squarci di vita, quando tragici, quando a lieto fine, di tante

ragazze dalla vita segnata dall'abbandono. Brandelli di vite, che le fonti ci consentono di immaginare, inseriti nella storia di come l'ente assistenziale aiutasse (o talora sfruttasse) queste giovani e come queste per converso si ponessero nei confronti di quelli che erano i loro padri legali.

Il primo capitolo del volume ricostruisce l'itinerario della storiografia sull'esposizione in età moderna, che si presenta come un'utile e aggiornata rassegna di una vasta bibliografia, che l'autrice padroneggia con sicurezza, e che spazia dalla storia dell'abbandono alla storia dell'educazione.

Con il secondo capitolo Reggiani entra *in medias res*, conducendo il lettore dai primi anni del Cinquecento sino alle riforme teresio-giuseppine. In questo lungo lasso di tempo, nel corso del quale il ducato di Milano perse la sua indipendenza e divenne territorio degli Asburgo di Spagna prima e di Austria poi, gli amministratori dell'Ospedale Maggiore si trovarono stretti tra l'esigenza morale e religiosa di tutelare le trovatelle, e quella economica di frenare il deficit dell'ente. Le giovani quindi, una volta rientrate nell'ente, dopo il periodo di affidamento a balie esterne del contado, erano inviate a servizio come domestiche o erano occupate all'interno dell'Ospedale con lavori tessili o con attività di accudimento dei malati. L'intreccio di motivazioni etico-religiose ed economiche è ben messo in luce dall'Autrice. La bambine costituivano tradizionalmente la maggioranza degli esposti. Restituite all'ente in genere intorno ai 6/7 anni, venivano recluse per essere addestrate ai lavori tessili. Il matrimonio era favorito grazie alla dote che l'Ospedale maggiore forniva. Un'altra possibilità era la monacazione. Restava comunque il grave problema della collocazione di centinaia di ragazze: nel 1586 ad esempio, erano ricoverate nell'Ospedale di San Celso (ove erano inviate le esposte) ben 344 femmine di età compresa

tra i 4 e i 30 anni, l'80% delle quali tra i 6 e i 12 anni) (p. 70). Durante il Seicento, la situazione si aggravò, sia per la pesante congiuntura economica, sia perché entrarono a San Celso anche molte orfane e derelitte di nascita legittima. Nel 1671 San Celso chiuse.

L'età minima per il lavoro a servizio fu alzata a 14 anni, all'inizio del Seicento. Le «servette» erano comunque esposte al rischio di essere maltrattate e sedotte (quando non stuprate): è noto il fenomeno circolare di esposte, che a loro volta divenivano madri nubili, costrette ad abbandonare alla ruota i loro figli. Inoltre, se rientravano nell'ospizio, le servette faticavano ad accettare nuovamente la rigida disciplina interna e costituivano un elemento di possibile disordine. Pertanto, nel 1627 il Capitolo vietò di collocare all'esterno le giovani. A questa delibera non erano però estranee regioni economiche: l'Ospedale Maggiore, infatti, non voleva privarsi della capacità di lavoro di ragazze già esperte: i lavori delle bambine più piccole erano scarsamente remunerativi. Dopo solo due anni, tuttavia, il provvedimento fu revocato: l'aumento delle esposizioni, la carestia e poi la peste aggravarono la situazione finanziaria dell'ente. Tenere le ragazze all'interno era egualmente costoso: meglio fossero impiegate fuori. Nel 1655 si deliberò di impiegare le fanciulle all'esterno già dopo i 7 anni d'età e nel 1662 si istituirono le dimissioni forzate, senza dote, delle nubili che a 20 anni non fossero presso un padrone. Con la chiusura di San Celso, nel 1671, si decise di impiegare le esposte in campagna, per farle vivere a contatto con possibili futuri mariti, che avrebbero gradito la modesta dote garantita dall'Ospedale. L'Autrice sottolinea come con questo provvedimento, che riguardava anche gli esposti maschi, Milano perse una quota di forza lavoro, in favore delle campagne. Le giovani, d'altra parte, erano assai rilut-

tanti a lasciare l'ospizio, proprio perché sapevano di essere esposte a pericoli, una volta sole all'esterno. Nel contempo, si assoggettavano a fatica alle rigide regole interne, di stampo claustrale. Chiuso San Celso, il brefotrofo fu accolto all'interno dell'Ospedale Maggiore Ca'Granda, in due ali, una per le puerpere, i lattanti e le balie dal latte, e una per le fanciulle che le balie ritornavano all'Ospedale. Il regime era claustrale, ma era difficile far rispettare la clausura all'interno di un ospedale affollato e di grandi dimensioni. Anche il disciplinamento delle vesti incontrò resistenza.

Il secondo capitolo indaga il periodo che va dalla riforma all'età napoleonica. Nel 1780 il brefotrofo fu collocato nell'ex-monastero di Santa Caterina alla ruota. Le riforme giuseppine e napoleoniche procedettero a una statalizzazione dell'assistenza, che iniziò a incrinare la storica presenza dell'aristocrazia milanese nell'amministrazione delle opere pie. Le Colombe (tutti gli esposti milanesi assumevano il cognome di Colombo, dall'effigie dell'ente) che chiedevano di rientrare alla Ca' Granda non erano poche (e dove avrebbero potuto andare, se maltrattate?). L'Ospedale tendeva a riprenderle, impiegandole come serventi. Le ragazze, anche bambine, meno docili erano inviate alla Senavra, il manicomio di Milano, con esiti immaginabili.

Il decreto del Regno d'Italia del 12 agosto 1807 sull'infanzia abbandonata stabilì che la tutela giuridica degli esposti fosse esercitata dagli enti assistenziali sino al compimento dei 21 anni, in tal modo maggiormente garantendo i trovatelli. Il decreto, al contempo, riconosceva che le maggiorenni che volessero lasciare l'istituto, avevano al facoltà di farlo, anche se ciò le avesse poste in situazione di pericolo. Nel 1811 il ministro dell'interno Vaccari rilevava che il sistema di impiegare le Colombine come serventi ospedaliere non consentiva loro di acquisire competenza lavorative, le

rendeva indocili e non aiutava le pazienti, che non ricevevano un adeguato trattamento: ciò in particolare alla Senavra, dove erano inviate le Colombine incorreggibili e dove invece le malate avrebbero necessitato cure caritatevoli e pazienti. Un percorso formativo nuovo fu quello di avviare diverse decine di esposte al mestiere di levatrice, nell'apposita scuola riaperta nel 1808 a Santa Caterina, ma già fondata nel 1767 da Maria Teresa nell'Ospedale Maggiore.

Nel 1816 Gaetano Strambio, direttore medico dell'Ospedale Maggiore, lamentava la generale insubordinazione delle figlie-serventi. Il doppio status di esposte e serventi, di assistite e di dipendenti, come aveva notato Vaccari, era causa di gravi inconvenienti. La tutela giuridica era rimasta agli amministratori dell'ente, mentre la direzione sanitaria era medica. Sarebbero occorse infermiere disciplinate e competenti. Strambio voleva licenziare le ragazze più insubordinate, ma gli amministratori tenevano. Chi prese in mano con forza la situazione fu Carlo Bellani, cui è dedicato il terzo capitolo. Amministratore unico per quasi vent'anni (1819-38), Bellani, ex brillante magistrato penalista, si occupò con rigore morale, solerzia indefessa e convinzione cristiana della riforma dell'ente ospedaliero. Fu inflessibile con i ladri: fece licenziare 40 dipendenti della Senavra (cosa che gli costò tre aggressioni) e fece cesare la pratica di inviare al manicomio come serventi le ragazze riottose. Cercò di trasmettere alla Colombe l'etica cristiana del lavoro e il senso di appartenenza all'ente che le aveva protette. Fermo nel reprimere gli abusi, fu però altrettanto pronto a esercitare il perdono, riammettendo le giovani che si pentivano. Riuscì a impiegare o sposare molte Colombe, interrompendo la pratica di impiegarle nell'Ospedale. Fu così possibile assumere infermiere esterne, più motivate, sino a che nel 1845 furono chiamate le suore di carità di S. Vincenzo de' Paoli.

Il volume è corredato da molti utili grafici ed è costruito, come detto, su una vasta messe di fonti archivistiche. Il quadro complessivo è di grande interesse e si snoda all'intreccio tra storia di genere, storia dell'assistenza, storia della carità, dell'infanzia e dell'educazione, ma anche storia giuridica e storia sociale. L'Ospedale Maggiore non era un brefotrofo, come l'Ospedale degli Innocenti di Firenze: era anche un brefotrofo, con una struttura complessa, che l'autrice tiene sempre presente, sottolineando lo scarto tra regole e prassi, in una secolare e affascinante storia, presentata con rigore metodologico e intelligenza euristica. Pregevoli e sempre scerve da cadute ideologiche sono pure la vivide pagine dedicate alle singole figure di esposte, che emergono dalle fonti: ragazze private della loro infanzia, ribelli in fuga, innamorate, ubriacone, penitenti. O comunque ancora grate all'ente che aveva svolto le veci della famiglia, tanto da lasciargli in eredità, alla propria morte, i miseri averi risparmiati in una vita di stenti.

*Simonetta Polenghi*

**José Luis Hernández Huerta, Antonella Cagnolati, Alfonso Diestro Fernández** (edd.), *Connecting History of Education. Scientific Journals as International Tools for a Global World*, Salamanca, FahrenHouse, 2015, 212 pp.

The thrive towards internationalization and standardized best practices has invested the journals of human sciences all over the world. The need to be indexed, the necessity of a rigorous process of peer review, the possibility to publish as open source, the establishment of ministerial rankings: all these rapid changes have been endured, accepted or anticipated by journals of human sciences, among which

those of history of education are no exception. Nowadays young researchers are stimulated to publish abroad as soon as possible: what used to be the final aim of long years of researches has now become a precondition for an academic career, or at least a very good card. On the other hand, publishing abroad is not so easy, for various reasons. It has been proved that many journals tend to prefer authors belonging to the same linguistic/cultural area of the journal or of its board. A foreign journal is not necessarily an international one.

Single researchers as well as journal executive boards have to face these challenges.

In 2014 the Italian Society of Education (SIPED) has published the acts of a congress dedicated to *Pedagogical Journals and quality of the research* on its Journal («Pedagogia oggi», n. 2, 2014, on-line: <<http://www.siped.it/22014-riviste-pedagogiche-qualita-ricerca/>>). In 2015 the first issue of «History of Education & Children's Literature» dedicated a monographic section, with eight essays, to *The role of scientific journals in the development and internationalization of historical-educational research*. Antonella Cagnolati has organized a panel about *Institutions of the Fields: Discussing scientific journals on History of Education* in the ISCHE Standing Work Group *Mapping the Discipline History of Education*, which was presented in the 37 ISCHE Congress held in Istanbul, 24-27 June 2015 (discussant Eckhardt Fuchs). Six journals were presented in front of a crowded lecture hall. Cagnolati and Hernández Huerta, directors of the Journal «Espacio, Tiempo y Educación», have decided to carry on the debate and help the cooperation by providing a tool on educational history magazines.

Hernández Huerta, Cagnolati and Diestro Fernández have therefore decided to submit some relevant questions to the di-



rectors of many journals of history of education and have published their answers, hence providing the readers with a precious tool of knowledge and comparison. The book presents twenty-six journals of various parts of the world (Australia, Brazil, Canada, Chile, Colombia, France, Greece, Hungary, Italy, Mexico, Spain, Sweden, United Kingdom, United States, Venezuela) through the descriptions provided by the directors or vice-directors or editors. One can find old prestigious Journals, like «Histoire de l'Éducation», «History of Education», «History of Education Quarterly», «Paedagogica Historica» as well as recently founded journals. A list of other twenty scientific journals (Argentina, Brazil, Canada, Colombia, Czech Republic, Croatia, France, Germany, Italy, Spain, USA, United Kingdom) is moreover published at the end of the book.

The book is indeed a useful tool, that is recommended to all researchers. It shows trends and strategies, good practices and cultural choices. It is rather striking though, to see a great gap in the space every author chose to dedicate to his/her answer. If the average number of pages is nearly 7, there are 3 journals covered by 3 pages and one by only 2, whereas others provide up to 10 and 11 pages, and «History of Education & Children's Literature» reaches 17.

The questions addressed by the three editors (but not always fully answered) are many. The reader can thus get a wide perspective on the current changes and policies of many journals. The articles are written in English, French, Spanish, Italian and Portuguese: a choice that may not help the readers who do not master all these languages.

One can find a brief history of the journal, a description of it and of the structure of the editorial team and of the journal policies. The organizational changes that often occur, in the rapid process of profes-

sionalization of the editors are interesting. Pages are dedicated to the project and the aims of the journal, as well as to the main topics (sometimes with charts and quantitative analysis, too). The languages of the articles and the nationality of authors are also often taken into account. A key question concerns editorial strategies and management. The transition from the old «human» process to highly automatized systems like Scholar-One is a core theme, as well as financial support and fundraising questions. The strategies for indexing the journal in both national and international catalogues and databases are obviously a relevant question, but quite a few journals are still struggling. The cataloguing data show the trend, from printed text to open access forms. The influx of social networks is also a theme sometimes addressed and questioned.

Indexes and evaluation questions, pressure from ministerial policy, research funding and ranking systems are central problems. The role of the director and of the editors in the evaluation system are also critical, since same validation systems that convert scientific articles into credits do not acknowledge editing a scientific journal as being a scientific work, thus reducing the incentives for researchers to get involved in the editorial process.

Future perspectives depends on how the editors intend to answer to these challenges.

*Simonetta Polenghi*

Emma Gasperi (a cura di), *L'educatore, l'invecchiamento attivo e la solidarietà tra le generazioni*, Lecce-Brescia, Pensa MultiMedia, 2013 209 pp.

L'Anno Europeo dell'invecchiamento attivo e della solidarietà tra le generazioni ha

offerto l'occasione per realizzare, presso la sede di Rovigo dell'Università degli Studi di Padova, il Convegno *La figura dell'educatore nella promozione dell'invecchiamento attivo e della solidarietà tra le generazioni*. Il Convegno si è rivolto anche agli studenti del Corso di studi in Scienze dell'educazione e della formazione che prevede, presso quella sede, il curriculum in *Educazione sociale e animazione culturale*: gli iscritti a questo corso possono diventare professionisti dell'educazione anche con persone anziane.

Il volume raccoglie gli atti del Convegno nel quale si sono susseguite relazioni teoriche che hanno indagati gli aspetti fondativi di ordine pedagogico legati all'invecchiamento, ad altre metodologiche, ad altre ancora che hanno posto in luce le «buone pratiche» già realizzate. In questo senso il volume rappresenta sia una rassegna dei problemi pedagogici inerenti la vita dell'anziano, sia un resoconto argomentato delle attività di animazione culturale che hanno trovato attuazione nelle istituzioni pubbliche e nelle associazioni presenti nel territorio e che, seppur non comparabili perché riferite a specifiche realtà e attività, testimoniano i positivi rapporti che l'Università ha saputo intrecciare con il territorio nel quale opera.

Questo collettaneo è ricco di spunti, indicazioni e informazioni che pongono l'accento sull'anziano autosufficiente e socialmente impegnato, senza però dimenticare – come sottolinea la Curatrice nell'*Introduzione* – che «tra le sfide pedagogiche che l'educatore si trova ad affrontare non vi è [...] solo l'invecchiamento attivo, ma la vecchiaia nella globalità delle sue caratteristiche, che includono anche il decadimento psico-fisico, la possibile presenza di malattie invalidanti, l'alta probabilità di aver perso delle persone care e la certezza della fine» (p. 16).

Nel saggio di apertura, a carattere te-

orico, Sergio Tramma solleva preliminarmente una questione di genere, segnalando che non solo la popolazione anziana presenta una femminilizzazione progressiva al crescere dell'età, ma anche che si ha una netta prevalenza di donne nelle professioni educative, sanitarie e assistenziali. Conseguentemente, trattando del rapporto tra popolazione anziana e operatività educativa non si può non tener conto della sua inequivocabile connotazione di genere. Passando alla questione dell'invecchiamento attivo, l'Autore esorta ad affrontarlo senza retorica, senza confondere i desideri con la realtà, e non limitandosi a esaltare qualche buona prassi che dice molto di sé e della propria presenza in un luogo/tempo, ma dice poco della propria assenza in altri luoghi e in altri tempi. Tramma ritiene che l'invecchiamento attivo non si produca spontaneamente, ma che abbia bisogno di sollecitazioni intenzionali e artificiali per realizzarlo, e che anche la solidarietà tra generazioni, da intendersi in senso bidirezionale, non possa essere considerata un esito spontaneo di processi sociali, ma necessiti di essere incoraggiata e incentivata dalle istituzioni. Trattando poi della difficile identificazione della vecchiaia Tramma conclude osservando che la modernità consegna alla cosiddetta postmodernità una vecchiaia che «a causa del venir progressivamente meno delle operazioni di garanzia e riequilibrio del welfare state, potrebbe tornare a essere, in alcune sue importanti componenti, una condizione della vita caratterizzata da forme, anche forti, di povertà/esclusione/marginalità» (p. 22).

Seguono due saggi che riguardano i futuri educatori e si collocano, nell'economia del volume, a raccordo tra la teoria e la pratica: nel primo Emma Gasperi e Alessandra Gregianin presentano i primi risultati di un'indagine, condotta nell'anno accademico 2011-2012, che si è posta

l'obiettivo di stabilire quale sia il punto di vista degli studenti sull'anziano, al fine di prospettare eventuali interventi formativi correttivi: questi vengono indicati alla fine del saggio e costituiscono una chiara indicazione metodologica anche per i docenti del corso di studi.

Nel secondo Emma Gasperi e Alessandra Cesaro entrano nello specifico del morbo di Alzheimer, una malattia che è sempre più frequente e che ha un'incidenza statisticamente rilevante nella popolazione anziana. Dopo aver descritto questa patologia in tutte le sue manifestazioni, le Autrici osservano che il compito principale dell'educatore consiste nell'accompagnare il malato di Alzheimer attraverso un percorso che ne metta in luce le risorse residue e perché questo avvenga è importante comprendere che anche se la malattia non è curabile è però possibile aver cura della persona affetta dal morbo di Alzheimer e del suo *caregiver*. Proprio questo principio pedagogico ha guidato l'indagine esplorativa tra i futuri educatori per individuare la loro rappresentazione sociale del malato d'Alzheimer e quindi avanzare un'apposita proposta formativa. In questo capitolo del volume è importante sottolineare che viene messo a fuoco il concetto di «cura pedagogica» come *l'aver cura* della persona, che va ad integrarsi con quello di cura terapeutica o medica, ma ne costituisce una declinazione particolare che ha implicazioni specifiche nell'insegnamento dato ai futuri educatori.

I contributi successivi focalizzano l'attenzione sull'anziano attraverso il resoconto di esperienze specifiche realizzate nel territorio veneto che forniscono un'immagine non generalizzabile, ma significativa.

Nel primo Eleonora Raimondi presenta la sintesi di un'indagine svolta tra gli iscritti alle Associazioni per la Terza Età del Polesine, che traccia una fotografia

del volontariato anziano nella provincia di Rovigo. Dall'analisi dei dati raccolti emerge l'immagine di un anziano che ha positivamente accolto la sua condizione di pensionato, orientato al futuro, impegnato in una famiglia – sia anagrafica sia allargata – vissuta sia in termini «strumentali», di scambio e di confronto, che in termini «emozionali», di supporto affettivo ed emotivo, un anziano che manifesta un'attenzione significativa alla vita sociale e comunitaria e un'importante propensione alla solidarietà.

Nel contributo successivo Alessandra Gregianin, in sintonia con quanto affermato nei saggi precedenti, tratta dell'Università del Tempo Libero di Mestre. Respingendo le immagini sociali stereotipate dell'anziano che inducono a ritenere l'età anziana caratterizzata esclusivamente dal declino delle funzionalità fisiologiche e dalla perdita delle capacità acquisite, l'Autrice evidenzia che le ricerche neurologiche e psicologiche testimoniano, invece, come la persona, perfino in età molto avanzata, sia in grado di far leva sul suo potenziale di risorse residue attivando ancora nuove capacità. Il saggio prosegue concentrando l'attenzione sui temi che sono oggetto di insegnamento all'interno dell'Università, mettendo anche in rilievo la positività di certe risposte effettivamente coincidenti con i bisogni espressi dagli anziani e alcune criticità che non dipendono dalla buona volontà degli organizzatori dell'Università, ma da ragioni di ordine logistico quali la numerosità degli iscritti, le risorse umane limitate o i mezzi economici insufficienti. Anche in questo saggio viene data un'indicazione per i futuri educatori: è importante che sappiano riconoscere e valorizzare le potenzialità degli anziani al fine di progettare per loro esperienze efficaci.

Segue un saggio di Cristina Mazzucco che presenta la sintesi di un percorso di ricerca-azione che ha visto coinvolti 38

anziani frequentanti alcune sezioni dell'Università della Terza Età della provincia di Rovigo, avente l'obiettivo, da una parte, di indagare il loro mondo, le loro rappresentazioni, i loro bisogni e interessi, per restituirli agli stakeholders di settore del territorio, e, dall'altra, di testare e di proporre alcune metodologie educative e di animazione. Dall'analisi delle interviste a testimoni qualificati emerge un profilo abbastanza uniforme dell'anziano della terza età di questo territorio: sembra essere persona molto attiva e impegnata sul piano sociale e nel volontariato.

Conclude la serie di ricerche sul campo Barbara Baschiera, la quale, muovendo dall'idea che solo una società che investe in partecipazione, salute e sicurezza può contribuire a creare le condizioni in cui gli anziani possano trasformarsi da *target* passivo dei sistemi sanitari e sociali in una risorsa per la società punta a porre in evidenza il rapporto tra le generazioni. L'Autrice, nell'analizzare il rapporto tra le generazioni da un punto di vista formativo, evidenzia come lo scambio intergenerazionale quale dono di sé, reciprocità e cura dell'altro sia generativo di relazioni mediante cui legittimare e valorizzare il potenziale degli anziani. Inoltre riferisce di una positiva esperienza realizzata mediante la strutturazione di «un modello di ambiente formativo online» (un *blog* autobiografico) in grado di aggregare le diverse età della vita: un ambiente in cui, mediante lo scambio dei propri vissuti personali, ventidue preadolescenti di una classe prima di una scuola secondaria di primo grado della provincia di Venezia sono entrati in relazione con altrettanti anziani volontari in una struttura protetta di Padova, divenendo co-costruttori di comunicazione e conoscenza. L'economia del dono ha così trovato realizzazione nel modello relazionale e formativo sperimentato. Potenziando tali esperienze – affer-

ma l'Autrice – si darebbe ai preadolescenti la possibilità di conoscere da vicino il mondo degli anziani e di arricchirsi dei loro valori di testimonianza e saggezza, e, viceversa, ciò consentirebbe alla terza età di confrontarsi con una generazione che ha interiorizzato modelli estremamente diversi dai propri, arrivando perciò a una reciprocità formativa.

Il volume, oltre a porre in termini pedagogici la visione di un'età della vita per molto tempo trascurata dalla stessa scienza dell'educazione, ha il pregio di mettere in luce la complessa e problematica dimensione della solidarietà intergenerazionale anche come possibile dimensione formativa per i futuri educatori. In questo senso esso ripropone, coordinandole in modo efficace in un campo specifico, le due dimensioni costitutive della pedagogia: quella teorico-interpretativa tesa a costruire un impianto concettuale e quella prassico-operativa capace di declinare nella realtà, attraverso «buone pratiche» coerenti ed efficaci, i presupposti teorici.

Carla Callegari

Teresa González Pérez (ed.), *Reformas educativas y formación de profesores*, Madrid, Biblioteca Nueva, 2015, 308 pp.

La relevancia de la formación del profesorado para una mejora de la calidad educativa ha sido puesta de relieve reiteradamente a lo largo de las diferentes reformas educativas en los últimos años. Desde el inicio de la construcción de los sistemas nacionales de educación, se ha entendido que el profesorado es uno de los principales agentes en la aplicación de las políticas educativas. Por este motivo, entre otros, los planes de estudio que intentan mejorar la profesionalidad docente han estado sujetos a profundos debates y modificaciones. Pre-

cisamente a esta cuestión se dedica el libro que la profesora de la Universidad de La Laguna Teresa González Pérez, ha editado dentro de la colección *Memoria y crítica de la educación* de la editorial Biblioteca Nueva. El objeto de este trabajo, que ha sido abordado por diferentes especialistas en la formación docente desde una perspectiva histórica, tiene como fin estudiar los distintos modelos de formación del magisterio a lo largo de los siglos XIX y XX. Un aspecto de gran interés, ya que se pueden extraer ejemplos históricos sobre la puesta en marcha, las dificultades y las particularidades que este tipo de propuestas curriculares han sufrido a lo largo de su historia en España y en otros países. De hecho, esta última cuestión es una de las más interesantes del libro. No solo podemos encontrar en él análisis sobre la peculiaridad del contexto español. Estudios concretos sobre Marruecos, Chile, México y EEUU también tienen cabida en sus páginas y ofrecen estudios de gran relevancia histórica para tener presentes en el debate actual sobre la cuestión que el libro aborda.

Desde un punto de vista formal, la obra se divide en diez capítulos. A pesar de que no existe una división interna en este sentido, se podría decir que los mismos se agrupan en tres partes o bloques diferenciados. Una primera parte dedicada al análisis de la evolución de los modelos de formación del magisterio en España; una segunda centrada en la enseñanza y desarrollo curricular de disciplinas concretas dentro de las Escuelas de Magisterio; y una tercera que aborda los programas de formación docente en diversos países extranjeros.

El primer capítulo, escrito por el profesor Antonio Molero Pintado, presenta un interesante recorrido histórico por la institucionalización y desarrollo de los intentos reguladores de la formación del profesorado en España desde sus inicios, siglo XIX, hasta la Ley General de Edu-

cación (LGE) de 1970. Resulta de gran interés observar los primeros intentos de formación de maestros a través del Instituto Militar Pestalozziano de Madrid creado en 1805, primer antecedente o «embrión de Escuela Normal» (p. 25) en España. El capítulo avanza cronológicamente a través de los diferentes ejemplos de creación de instituciones para la formación docente. Se hace especial énfasis en la importancia que el liberalismo español va a tener para la institucionalización de tales modelos de enseñanza. Hablamos de la creación de la Escuela Normal Central de Madrid en 1839 y de uno de sus principales ideólogos, Pablo Montesino. A pesar de que las Escuelas Normales florecen sin que el propio modelo de maestro esté definido, el autor nos indica la importancia que esta época tuvo para la conformación de dicho rol. Posteriormente, el análisis se centra en estudiar las reformas llevadas a cabo en la II República y su «Plan Profesional». Se destaca la unificación del título de maestro y la ruptura de la separación entre maestros elementales y superiores, el desarrollo de las prácticas en las aulas y el aumento sistemático de la innovación pedagógica y de las metodologías didácticas. Por último, se explica la involución que supuso el primer franquismo para estos profesionales y las transformaciones modernizadoras que se produjeron en el tardofranquismo con el CEDODEP y los ICEs. Este trabajo termina con la sugerente revisión de los últimos programas de formación docente y presenta detallados argumentos para sustentar un debate sobre este objeto.

A partir de aquí, la obra se introduce de lleno en analizar los modelos de formación del magisterio dentro de las políticas educativas del tardofranquismo y la Transición hacia la democracia. El trabajo de los profesores Miguel Beas Miranda, J. Antonio Lorenzo Vicente y Soledad Montes Montero se dedica, justamente, a esta

cuestión. En concreto, tiene por objetivo investigar cómo se gestó la identidad profesional del magisterio en los años finales de la dictadura franquista. No obstante, para captar dicha construcción identitaria se estudia el currículum de formación de los maestros en esos años, las principales teorías pedagógicas que dominaban en el campo de las ciencias de la educación y el contexto político, económico y cultural que delimitaba los mismos. De esta forma, se desarrolla un análisis detallado de los planes de estudio de magisterio en los años cincuenta y sesenta. Pero también, se destaca la importancia que los diferentes organismos de formación continua del profesorado tuvieron a la hora de construir las diferentes generaciones de docentes durante esta época.

En este mismo sentido, el capítulo tercero escrito por la profesora Teresa González da una vuelta de tuerca más a esta cuestión y analiza de forma pormenorizada los planes de estudio de magisterio dentro de la LGE y la Ley Orgánica de Ordenación General del Sistema Educativo (LOGSE). Este capítulo se inicia con un detallado estudio de la política de formación del profesorado en los años setenta. Se denuncia, a su vez, las desigualdades de género existentes y, sobre todo, el escaso papel que el magisterio jugó en la configuración de la política educativa. A pesar de que España fuese uno de los primeros países en formar a sus maestros en el ámbito universitario, tales procesos de enseñanza fueron abiertamente «insuficientes» (p. 87). Los planes de estudio de los títulos de maestro estaban centrados abiertamente en una formación cultural de carácter generalista. Bajo el marco de la Transición, ya en los años ochenta, los estudios de magisterio sufrieron modificaciones notables. No solo hablamos de la eliminación de algunas disciplinas vinculadas a la política ideológica del franquismo, también de un

fenómeno modernizador notable que tiene que ver con la transformación institucional que sufrieron las Escuelas Normales al pasar a estar dentro del terreno universitario. Se produjeron, de esta forma, evoluciones en términos formativos, pero también mejoras salariales, estatutarias y de prestigio de la profesión. Un aspecto que acabo de consolidarse con la llegada del Partido Socialista Obrero Español (PSOE) al gobierno en 1982. No obstante, indica la autora, a pesar de las mejoras formativas como la creación de los Centros de Profesorado (CEPs) o los nuevos planes de estudio para el magisterio, existió en las diferentes reformas un olvido y distancia por parte de los administradores del estado con la cultura escolar y las preocupaciones cotidianas docentes. Un aspecto que todavía está por resolver a pesar de las mejoras indicadas.

En el capítulo cuarto, se puede observar el inicio de la configuración del segundo bloque que comentábamos más arriba. El lector podrá comprobar como aquí se presentan interesantes estudios de casos sobre la formación docente en disciplinas concretas y el importante papel jugado por los Movimientos de Renovación Pedagógica (MRPs) en la construcción del espacio educativo a lo largo de los años setenta y ochenta del siglo XX. El trabajo de la profesora M<sup>a</sup> José Vera Cazorla analiza la enseñanza de la materia de Lengua Inglesa en las escuelas de magisterio a través de un examen pormenorizado del Plan de Estudios de 1971. Un aspecto interesante a destacar, son las dificultades que existieron en España para formar maestros especialistas en tan solo tres años de estudio. Ello derivó, como ha señalado la autora, en claros déficits formativos y las dificultades prácticas para impartir el Inglés en las aulas. Ello produjo que diferentes generaciones de maestros de enseñanza primaria tuviesen notables dificultades para comu-

nicarse en dicha lengua de forma natural dentro del aula a pesar de ser especialistas en la misma. Un salto entre lo legislado y la práctica que también pone de manifiesto el profesor Juan Ramón Coello Martín en su estudio sobre la formación docente en la enseñanza de la Música y su inclusión en las escuelas en los años setenta. El problema se podía encontrar en diferentes planos. No solo que la Música se introdujo por primera vez en el currículum escolar con la LGE de 1970, también las dificultades para formar un profesorado específico en esta materia debido a problemas de carácter estructural, presupuestario y culturales. Lo más preocupante, señala el autor en este capítulo quinto, es que la música como disciplina escolar no se implantó como una materia obligatoria hasta 1990. Una característica deficitaria que vuelve a aparecer en la actual Ley Orgánica para la Mejora de la Calidad de la Educación (LOMCE).

Otro estudio de casos, pero esta vez sobre colectivos docentes concretos y su intento por mejorar la formación del profesorado, lo podemos encontrar en el siguiente capítulo escrito por el profesor Antón Costa Rico. En este caso, el autor investiga la importancia que los MRPs tuvieron para modernizar e introducir frescas perspectivas pedagógicas durante la Transición democrática. Como indica el autor, estos movimientos fueron muy importantes en estos años, ya que «la renovación e innovación pedagógicas alcanzaron importantes cotas y dejaron de ser un impulso minoritario para convertirse en un eje central de las políticas y los quehaceres educativos» (p. 174). Estamos ante una realidad muy importante para la formación del profesorado en estos años, como el lector podrá comprobar. El capítulo comienza con un intento por explicar y conceptualizar quiénes o qué es la renovación pedagógica. Un aspecto que abarca

una serie de transformaciones de diverso alcance y múltiples agentes que introdujeron innovaciones educativas. A partir de este punto, el autor nos presenta cuáles fueron los orígenes de los MRPs, sus principales enfoques sobre la formación de los docentes y la importancia que los mismos tuvieron a la hora de construir un nuevo modelo de rol docente y su contribución al cambio del contexto educativo español en esos años.

El último bloque de este libro, ofrece al lector interesantes ejemplos de formación del profesorado más allá de las fronteras españolas. El capítulo séptimo, aborda los modelos de formación del profesorado en Marruecos, un contexto poco conocido en el campo educativo internacional. La profesora Rachida Gharrafi comienza con un recorrido histórico por las principales políticas educativas llevadas a cabo en Marruecos desde su independencia en 1956 hasta la actualidad. Entre la realidad de tales reformas, destacan las diferencias que se pueden observar en el acceso a la educación entre las zonas urbanas y rurales. Un problema que afecta, especialmente, «en lo que concierne a las niñas ya que su acceso a la educación es aún más complicado» (p. 197). Este contexto de diferenciación y desigualdad, también se refleja en un perfil docente que en el medio rural se especifica por una escasa formación pedagógica. A grandes rasgos, el magisterio de las zonas rurales se define por un conocimiento de tipo coránico. La formación del profesorado, por tanto, ha estado sujeta a un debate sobre la marroquinización y arabización de los programas formativos docentes que ha tamizado las propuestas posteriores.

Un contexto diferente nos lo ofrece el profesor Jaime Caicedo Escudero con su estudio sobre los diferentes procesos de formación docente que tuvieron lugar en Chile entre 1960 y 1990. Una época que tuvo dos realidades muy diferenciadas de-

bido a los regímenes políticos totalmente encontrados en sus propuestas. De esta manera, el autor comienza por describir las características de la formación docente dentro del gobierno de S. Allende y termina con esta misma preocupación pero con la observación de tal cuestión dentro del marco de la dictadura de A. Pinochet. El primer modelo se especifica por un claro intento modernizador bajo principios de carácter humanista y democrático. El segundo, en contra, introdujo cambios fundamentales a partir de 1973. Se inició, así, un retroceso del modelo propuesto en décadas anteriores y el sistema educativo comenzó a guiarse por las leyes del mercado (políticas de carácter neoliberal). Un aspecto que condicionó tanto la democratización de la enseñanza universitaria, como las propias mejoras e innovaciones docentes.

Sin embargo, un modelo totalmente distinto, determinado por sus principios autogestionarios y reivindicativos lo podemos observar en el capítulo noveno. La profesora Oresta López Pérez tiene por objeto señalarnos la compleja realidad de la formación del magisterio en las Escuelas Normales Rurales de México a lo largo del siglo XX. Este estudio de casos nos ofrece un modelo muy particular de formación docente y su unión con la lucha política y social. Y es que, las Escuelas Normales Rurales mexicanas fueron un lugar tanto de formación docente, como de apego institucional y de ayuda hacia las comunidades campesinas. Este contexto de pobreza, exclusión y explotación en el México rural gestó un fenómeno de vínculo socio-educativo de claro carácter reivindicativo y de búsqueda de mejoras sociales para esta clase social. En este sentido, la autora nos señala como dichas escuelas fueron un «semillero de guerrilleros» (p. 267) y un lugar de creación de movimientos sociales a la contra de los terratenientes. A pesar de que en la actualidad ese marco se

ha modificado, estas escuelas normales no han perdido su identidad de compromiso socio-cultural.

El libro se cierra con el capítulo escrito por la profesora Regina Cortina, el cual presenta una síntesis sobre un estudio de mayor amplitud centrado en los modelos docentes que se han desarrollado en EEUU y algunos países europeos. Este último trabajo tiene gran interés por cuanto la autora comienza por realizar una revisión de las publicaciones más actuales sobre la formación del profesorado. A renglón seguido, se analiza las condiciones de trabajo del profesorado en EEUU, así como sus expectativas laborales y autonomía docente. Por último, se reflexiona sobre un caso muy particular e interesante: la formación docente que recibe el magisterio de la ciudad de Nueva York. Un modelo que pone énfasis en las nuevas políticas educativas de carácter neoliberal centradas en los criterios de calidad, la evaluación, los exámenes de acreditación y los diferentes niveles salariales existentes. Una realidad que comenzamos a reconocer abiertamente en nuestras fronteras.

Por todo lo señalado hasta aquí, estamos ante una obra de gran relevancia e interés para las personas que se dedican al estudio de la historia de la educación o de cualquier otro campo dentro del ámbito de las ciencias de la educación. Y es que, de este libro se pueden extraer varias conclusiones y enseñanzas interesantes para la actualidad. En diferentes capítulos los autores han repetido los fracasos que han supuesto algunas de las reformas que se han estudiado. La separación que suele existir entre quienes idean las leyes (los técnicos), quienes las crean (los políticos) y quienes las llevan a la práctica (los docentes) suele ser una realidad palpable en las diferentes reformas educativas. Una cuestión que analizan los especialistas que dan vida a este libro y que nos advierten sobre la necesi-



dad de tener presente tal particularidad de cara al desarrollo del sistema educativo y la formación del profesorado en el futuro.

*Mariano González Delgado*

Teresa González Pérez (ed.), *Templos del saber. Discursos políticos y utopías educativas*, Madrid, Mercurio Editorial, 2015, 360 pp.

Este libro ofrece un conjunto de trabajos de investigadores de Italia, Portugal, Brasil, Colombia, Chile, Estados Unidos y España que giran en torno a cómo se ha formado el magisterio, cómo han evolucionado las instituciones, las prácticas y las políticas educativas. Estos trabajos abordan temas muy variados desde la formación del profesorado en determinadas épocas en Colombia, Brasil o Portugal, las ideas de Paulo Freire sobre la formación de los maestros, la incorporación de la asignatura *Historia de la Educación* en el currículum para la formación docente en los Estados Unidos, la instalación de la orientación escolar a mediados del siglo XX en Chile o la evolución de las enseñanzas musicales en la educación obligatoria española.

En *Le politiche educative in un'epoca di cambiamento sociale*, Alessandro Bosi reflexiona sobre las aportaciones de la escuela a la sociedad. Tomando como punto de partida los discursos sobre políticas educativas de Lisboa 2000, el autor profundiza sobre el caso italiano desde los últimos años del siglo XX, recordando con ironía como muchos líderes políticos repitieron el mensaje de compromiso de Tony Blair cuando este afirmaba que quería concentrar en la educación los mejores recursos de su gobierno. La escuela es el lugar donde se unen el pasado y el futuro de un país, las necesidades sociales y los in-

tereses de la producción, las generaciones y las poblaciones con diferentes valores, tradiciones y expectativas particulares, las personas con su propio sentido del tiempo y del espacio donde viven. Condicionada por las deficiencias del sistema público, la escuela es parte de la nueva lógica del estado del bienestar y el activo más importante para construir el futuro.

En *Ser modelo de virtud, de decoro y buenos modales para los alumnos. La formación de maestros en el Caribe colombiano durante el federalismo*, Alarcón Meneses escribe sobre la creación de las Escuelas Normales en la segunda mitad del siglo XIX. La estatalización de la formación de maestros ocupó un lugar principal en la agenda educativa del liberalismo radical y con la reforma de 1870 la formación de maestros se convirtió en objetivo primordial. Para llevar a cabo esta reforma se diseñaron tres proyectos estrechamente relacionados: la creación de las escuelas normales en cada uno de los estados soberanos, la contratación de maestros alemanes para dar forma a lo que se llamó Misión Pedagógica Alemana y, por último, la publicación de periódicos y revistas de carácter instruccionalista. En este texto se analizan algunos de los principales aspectos constitutivos de la cultura escolar propia de las escuelas de la región y, en concreto, la figura del maestro.

En *Formação, história de vida e das práticas docentes de professoras do ensino primário no Sul do Brasil, 1930 a 1960: memórias de professoras*, Ariclé Vechia y Antonio Gomes Ferreira recuperan las historias de las maestras que trabajaron desde 1930 hasta 1960 en las escuelas primarias públicas y privadas en el estado de Paraná al sur de Brasil. Estas tres décadas, que coinciden con importantes cambios políticos en el país y con una época de fuerte influencia de la Escuela Nueva y de la Iglesia Católica, fue un momento de

gran interés para la expansión de la escuela, pero con una educación desigual debido a las diferencias de clase, etnia, sexo y espacio geográfico.

Durante las primeras décadas del siglo XX, uno de los sueños de la sociedad brasileña, guiados por las ideas republicanas, era reformar la sociedad mediante la reforma del hombre; formar cívica y moralmente al pueblo brasileño con el objetivo de transformar Brasil en una nación a la altura de las más progresistas del siglo. Para lograr estos objetivos era necesario ampliar la escuela primaria pública para todas las capas de la población, modificar los patrones de enseñanza y de las instituciones escolares para formar un contingente de trabajadores que atendiesen las necesidades de la sociedad. La expansión y mejora de la formación del profesorado de educación primaria era indispensable para que el gobierno pudiese lograr su proyecto político-educativo.

El texto está organizado en tres epígrafes en los que se mencionan las distintas misiones de estas maestras: inspirar más que enseñar, ser agentes de estandarización ideológica y cultural, y promover la transformación social. Las memorias de estas profesoras revelan que consideraban el magisterio como una misión y que estaban imbuidas de los deberes cívicos en el ejercicio de su profesión. Además, evidencian tener siempre un discurso magistral. Más que hablar de su docencia, destacan con orgullo su participación en la inspección de la educación, con miras al mantenimiento de la calidad de la enseñanza y la homogeneización ideológica y cultural y el hecho de que se tomaran este trabajo como una misión: la de transmitir a los niños la cultura y los hábitos de la vida urbana, los hábitos de higiene, las normas de conducta y el amor por la patria.

*En Formare un docente produttore e organizzatore per la scuola dell'autonomia,*

Anita Gramigna reconstruye el perfil del maestro italiano entre las décadas de 1970 a 1990 del siglo pasado a partir de la entrada en vigor de la ley sobre la autonomía escolar (Ley 23/12/1998, n. 448), especialmente a la luz de un programa de capacitación que se convirtió en el escenario de un intenso debate político e ideológico en torno al paradigma de la autonomía y la productividad. Al examinar el desarrollo de modelos de formación de profesionales de la enseñanza, esta autora reflexiona sobre la calidad educativa de la escuela, de acuerdo con la eficiencia y la eficacia de la gestión, al tiempo que compara la situación de la educación italiana con la española.

El siguiente trabajo se titula *A formação de professores na perspectiva de Paulo Freire: Desafios de uma pedagogia interdisciplinar*. En el mismo Jaime Zitkoski examina la propuesta a favor de la pedagogía interdisciplinaria de uno de los pedagogos más significativos del siglo XX, Paulo Freire. Este educador propone una pedagogía innovadora para superar el modelo tradicional que reproduce la lógica de la fragmentación y la transmisión pasiva del conocimiento. Desde una perspectiva interdisciplinar, el objetivo central de la pedagogía de Freire es la lucha para transformar la realidad social y construir así un mundo más justo y fraterno.

En esta contribución se destacan las principales razones que Freire apunta para desarrollar una Pedagogía Interdisciplinar, que converge en la defensa de una educación humanista libertaria frente a la cultura de la opresión y de las prácticas sociales que reproducen la lógica de la dominación social. Jaime Zitkoski explica los principales argumentos de la propuesta de Freire en defensa de la interdisciplinaria en la educación, la producción de conocimiento y la formación de los docentes. La coherencia de Freire desafía la construcción de alternativas en todos los niveles educativos

y la praxis política para hacer frente a las diversas formas de opresión y de violencia contra las personas y la naturaleza. En este trabajo se destacan tres aspectos fundamentales de la propuesta de Freire que apuntan a la necesidad de construir una educación interdisciplinaria comprometida con la humanización del mundo: la ruptura con los modelos tradicionales de la ciencia y la educación, los retos de una pedagogía interdisciplinaria en la lectura del mundo contemporáneo, y la práctica del diálogo y la formación de maestros con vistas a la lucha política.

En el trabajo *Formação de professores em Portugal (1970-1990)* Maria João Mogarro relata los antecedentes y las circunstancias de la formación del Magisterio en una etapa llena de transformaciones políticas y sociales. En un contexto que abarca desde la dictadura, la revolución de los Claveles y el establecimiento de la democracia, esta autora hace un recorrido por las políticas educativas desde 1970, la reforma de Veiga Simão aprobada en 1973 hasta el restablecimiento de la democracia y la eliminación de las estructuras heredadas de la dictadura de Salazar en vigor hasta abril de 1974. El trabajo incluye diversos apartados sobre la evolución de los planes de estudio y la organización de los cursos, las modalidades de evaluación y los exámenes además de un epígrafe sobre la precaria situación institucional en la que se encontraban los profesores de estas escuelas de formación.

Durante su existencia las escuelas de Magisterio fueron consideradas instrumentos privilegiados de la política educativa de Salazar. Posteriormente, fueron también uno de los símbolos más fuertes de la educación socialista en su proceso revolucionario. Su final fue dictado por las organizaciones extranjeras ya que las nuevas instituciones traerían más financiación internacional para instalaciones, equipo y

personal de formación de las escuelas. El proceso de la extinción gradual de estas escuelas Magisterio primario en la década de los ochenta marcó el fin de un ciclo en la formación de profesores y la cultura pedagógica portuguesa.

En *Innovación tecnocrática y nuevos saberes académicos en la formación docente*, González Pérez analiza las transformaciones de los estudios de magisterio en España desde la década de los años sesenta del pasado siglo XX hasta la actualidad. En el periodo tardo-franquista el gobierno español comienza a interesarse por mejorar el nivel cultural y por extender la escolarización como un medio de alcanzar el progreso económico. Con el Plan de 1971 los maestros pasan a denominarse profesores de educación general básica y las escuelas de magisterio se integran en las universidades. Con rango de diplomatura universitaria, los estudios para la formación de los futuros maestros constarán de un solo ciclo que durará tres años, incluyendo un periodo de tres meses de prácticas de enseñanza. Se eleva la edad y la formación académica exigida para matricularse en estos estudios, siendo necesario obtener el título de C.O.U. (Curso de orientación universitaria). Se combina la formación de maestro generalista, capacitado para impartir enseñanzas en la primera etapa de la E.G.B., y la de maestros especialistas, para cada una de las áreas establecidas en la segunda etapa (Ciencias Sociales, Lengua, Ciencias Naturales y Matemáticas, principalmente). Este proceso de innovación tecnocrática aplicada a las culturas escolares bajo el control del Estado pretendía modernizar el sistema educativo sin cuestionar las bases ideológicas y políticas del franquismo.

La implantación de la Ley General de Educación (1970) supuso una profunda reforma de todo el sistema educativo español, constituyó la base para las refor-

mas educativas posteriores, y sobre ella se asentó la Ley de Ordenación General del sistema Educativo (1990) y el nuevo diseño curricular para el magisterio. En este capítulo González Pérez aborda el avance que significó para la educación española todas estas transformaciones que marcaron el tránsito educativo de la dictadura a la democracia.

En el capítulo *Formação de professores e fortalecimento da escola pública no Brasil (1970-1990)*, Libania Xavier y Sonia de Castro Lopes dan una visión general de las políticas y experiencias de formación del profesorado en el contexto brasileño de las décadas de 1970-1990. Comenzando este recorrido histórico en el último tercio del siglo XX, estas autoras escriben sobre la evolución del magisterio en Brasil y su paralelismo con la enseñanza primaria. En la historia de la educación brasileña, la formación del profesorado siempre ha ocupado un lugar destacado, ya sea en los discursos de los políticos e intelectuales más destacados del siglo XIX y el paso a las primeras décadas del siglo XX, o en el período comprendido entre los años 1930 a la década de 1960 del siglo XX. Desde la década de 1980, la formación inicial y continua de los docentes se benefició de las innovaciones pedagógicas que marcaron el período de democratización del país con la institucionalización de algunos de sus principios básicos en las directrices legales establecidas en la Ley de Educación Superior, promulgada en 1996.

En su trabajo *Scholars of Distinction and the Development of Educational History in the United States*, Karl Lorenz estudia la incorporación de la asignatura *Historia de la Educación* en el currículum para la formación docente desde mediados de siglo XIX. Este trabajo repasa brevemente las aportaciones de un grupo de eruditos que influyeron en el desarrollo del campo de la Historia de la Educación

en los Estados Unidos. Los efectos del trabajo de estos eruditos sobre la teoría y la práctica educativa varían al igual que la influencia que ejercieron en diferentes momentos del pasado de ese país. Si bien la literatura especializada normalmente cita estas personalidades, un sinnúmero de otros académicos e instituciones también han dejado su huella en el campo. Como representantes de una comunidad más grande que ha estado activa desde mediados del siglo XIX, tanto los estudiosos reconocidos como los que no han establecido la historia de la educación como un importante campo de estudio y de investigación, y una parte integral de los programas de preparación para los educadores.

En *Cambios en el desempeño profesional de la inspección educativa en los últimos cincuenta años*, Salmerón Nieto, González García y Beas Miranda reflexionan sobre la Inspección educativa en España desde sus inicios en marzo de 1849 y presentan las transformaciones que ha experimentado este organismo en España en el último medio siglo a tenor de los avances sociales, políticos y educativos. La Inspección educativa ha ido evolucionando a lo largo de su existencia acorde a las necesidades del sistema educativo y en ocasiones siguiendo los intereses de los diferentes grupos políticos en el poder. Los autores estudian las causas de los cambios realizados en la asignación de desempeños profesionales, estudian las funciones asignadas a esta inspección y las consecuencias de los cambios en sus atribuciones y competencias, y analizan el organigrama de este cuerpo de la administración.

Tras profundizar en los principales aspectos en los que se localizan cambios en la asignación de atribuciones y competencias desde 1970, los autores focalizan su trabajo en el desempeño profesional del equipo técnico de Inspección de Granada entre 1970 y 1977 con el objetivo de co-

nocer el discurrir concreto de un servicio provincial, apreciando las posibles similitudes con lo visto con anterioridad sobre el conjunto del territorio español.

En el capítulo *¿Técnicos de la política y del alma? Un episodio en las discusiones sobre políticas de educación secundaria en Chile y la instalación de la orientación escolar a mediados del siglo XX*, Pablo Toro Blanco examina el Plan de Renovación Gradual de la Enseñanza Secundaria (1945) tanto como un episodio de la política educacional, considerando los componentes domésticos del conflicto, como un síntoma de la internacionalización de las políticas de educación. A través del análisis de la reforma educativa en Chile de mediados de la década de 1940, el autor aborda la contraposición existente en la discusión local sobre políticas educativas entre visiones técnicas y sapienciales o de *sentido común*. Toro Blanco examina los aspectos de la integración de un nuevo programa curricular, la orientación educacional, en la enseñanza secundaria chilena; una especialidad académica vinculada a la psicopedagogía que perseguía esencialmente la diversificación en sus áreas de intervención educativa con el alumnado.

Este trabajo se inscribe en el área de estudio de la historia de las políticas educativas y se complementa con un enfoque panorámico que explora la posibilidad de conectar con la historia de las emociones en la enseñanza secundaria. Para el investigador, la historia de las emociones ha traído a la historiografía nuevos y complejos desafíos, entre los que se incluye el carácter elusivo del objeto de estudio definido desde campos distantes como la biología y la antropología. En este sentido, en sus reflexiones finales Pablo Andrés Toro Blanco recuerda cómo pocos años después de establecerse los dispositivos curriculares de orientación educacional,

tras los impulsos reformistas iniciados por el Plan de Renovación Gradual de la Enseñanza Secundaria, un analista profesional de psicología juvenil se lamentaba de que ciertas formas tradicionales de expresión de la identidad de los jóvenes, incluyendo los diarios de vida, estuvieran desapareciendo. Para el autor de este capítulo, esos diarios serían un material muy enriquecedor tanto desde un punto de vista histórico como para la historia de las emociones.

Finalmente, en *La evolución de las enseñanzas musicales en la educación obligatoria. De la LGE a la LOGSE*, Juan Ramón Coello Martín hace un repaso a la inclusión de la asignatura de música en la enseñanza obligatoria en España. Aunque en la Ley sobre Educación Primaria de 1945 aparece la materia “Música y Canto”, esta se incluye en el apartado de materias complementarias, de nivel secundario, y cuyos contenidos no están reglados por el Ministerio de Educación, Cultura y Deporte sino por diversos organismos competentes. Posteriormente, en las Orientaciones Pedagógicas de 1970-71 y de 1976 que desarrollan la Ley General de Educación de 1970 aparece el Área de Expresión Dinámica para la primera etapa de la Educación General Básica en la que se incorpora la asignatura de Música, si bien, según este investigador, en la praxis el Área de Expresión Dinámica quedó reducida a Expresión Corporal. A partir de 1990, con la entrada en vigor de la Ley Orgánica de Ordenación General del Sistema Educativo (LOGSE, 1990) se produjo la implantación curricular de la Música en la Enseñanza Obligatoria; en Educación Infantil, dentro de Comunicación y Representación; en Educación Primaria integrada en el ámbito de Expresión Artística, y en la Educación Secundaria dentro del Área de Música.

En este trabajo Coello Martín incluye los objetivos generales, los contenidos y

los objetivos de las actividades de los distintos bloques temáticos que debían impartirse en los Ciclo Inicial, Medio y Superior de la Ley General de Educación, para posteriormente analizar la presencia de esta asignatura en la LOGSE, mencionando los objetivos de dicha asignatura tanto para la Educación Primaria como para la Educación Secundaria Obligatoria.

En definitiva, *Templos del Saber. Discursos políticos y utopías educativas* ofrece un conjunto valioso y muy variado de aportaciones sobre la historia del Magisterio en Italia, Portugal, Brasil, Colombia, Chile y España. La historiografía educativa se ha ido enriqueciendo con diversos estudios sobre las políticas públicas, los centros y niveles educativos realizados en diversas partes del mundo; estudios que han servido de base para preparar trabajos de síntesis con nuevos métodos y enfoques historiográficos. En el trabajo que nos ocupa, estas contribuciones ofrecen elementos para la comprensión global de las políticas educativas y de los proyectos educativos normalistas, y nos permiten comprender en qué coyunturas se transformó la educación y que estrategias políticas se emplearon. La diversidad de estas aportaciones tanto en lo que respecta a enfoques como a la temática enriquecen la visión historiográfica de conjunto sobre un aspecto tan importante en la historia de la educación como es la formación de los maestros de enseñanza primaria.

M<sup>a</sup> Jesús Vera Cazorla

**Dorena Caroli, *Per una storia dell'asilo nido in Europa tra Otto e Novecento*, Milano, FrancoAngeli, 2014, 380 pp.**

In occasione del IX Congresso degli scienziati di Genova del gennaio 1847, la Società d'incoraggiamento delle Scienze, Lettere

ed Arti – su richiesta di Giuseppe Sacchi, «papà Sacchi», figura eminente della vita culturale e protagonista dell'assistenza all'infanzia nella Milano dell'Ottocento – nominò una commissione d'indagine per studiare le condizioni dell'allattamento nelle famiglie povere della città, in presenza di madri lavoratrici, e per individuare il quartiere in cui fosse più conveniente fondare il primo «presepe». La scelta ricadde sulla parrocchia di San Simpliciano in Porta Comasina, dove era stato rilevato il più alto numero di neonati di madri operaie. Se già al X Congresso degli Scienziati di Venezia del settembre 1847 ne fu presentato lo Statuto, subito segnalato come un modello da diffondere, gli avvenimenti del 1848 ne ritardarono l'attuazione, che tuttavia poté realizzarsi con il giugno del 1850 grazie al decisivo aiuto di Laura Solera Mantegazza – figura esemplare di donna per patriottismo, filantropia e impegno educativo – proprio nella parrocchia indicata, in una casa situata in contrada di Santa Cristina e aperta ai figli di sarte, filatrici di seta e domestiche.

Milano, non immemore delle pagine più luminose della sua storia, dedicò nel 1889 quella via, trasversale di corso Garibaldi, a Laura Solera Mantegazza, non soltanto benefattrice ma artefice degli sviluppi dell'istituzione – «Pio ricovero per lattanti» – e del suo ruolo non solo nel contrastare l'esposizione dei neonati ma pure nell'assistere le madri anche a domicilio, con un forte impegno nel diffondere le buone pratiche dell'educazione infantile. Si trattò fin dall'inizio di un esperimento riuscito, con numeri di grande rilievo, e replicato in altre città italiane all'indomani della sua nascita, non a caso, nel cuore della periferia operaia e popolare di Milano, come hanno messo in evidenza gli studi di Franco Della Peruta, intuendo la specificità di questo tipo di risposta nel più ampio quadro delle politiche in favore dell'infanzia.

Questo volume di Dorena Caroli – pubblicato nella Collana di Storia delle istituzioni educative e della letteratura per l'infanzia dell'Università degli Studi di Macerata – rappresenta al riguardo un'attesa conferma e un'importante novità sul piano storiografico. Una conferma, perché riannoda il *fil rouge* dell'intera vicenda alle condizioni sociali legate all'avvio del processo di industrializzazione, che aveva condotto a una crescita insostenibile dell'esposizione infantile, già rilevata a suo tempo dalle ricerche di Volker Hunecke e ora da quelle di Flores Reggiani; una novità, perché inserisce la nascita dell'asilo nido in un quadro comparativo di respiro europeo – affrontando i casi di Francia, Inghilterra, Germania e Russia – lungo l'arco di un secolo.

Si possono così cogliere meglio i legami fra il tentativo milanese e l'originaria esperienza parigina, in rapporto alla prima *crèche* fondata nel 1844 da Firmin Marbeau, giurista e filantropo, che ebbe subito chiara una duplice finalità, da una parte di assistenza nei confronti degli strati più deboli della popolazione e dall'altra di prevenzione dell'allattamento mercenario e dell'abbandono, con un significativo riscontro economico e soprattutto sociale, anche per il rafforzamento del legame fra la madre e il bambino che ne derivava grazie all'allattamento. Ci si trova di fronte a una proposta di religiosità, per così dire, ripensata sul piano civile che la traduzione italiana di *crèche* con «presepe» coglie assai bene, anche per il rimando da parte di Marbeau, come rievocato da Sacchi, a un episodio della biografia di Vincenzo de' Paoli quando il santo donò cento culle a una donna che salvava la vita degli esposti davanti alla cattedrale di Notre-Dame, per poi divenire il fondatore dell'*Hôpital des enfants-trouvés* e delle *Filles de la Charité*. Il richiamo vincenziano si rivela ancora una volta centrale in tutta la riflessione

caritativa e filantropica dell'Ottocento, anche in diversi filoni di pensiero, come ha più volte sottolineato Roberto Sani.

Il risultato ottenuto da Marbeau, che costituiva uno dei primi frutti di una politica sociale non affidata solo alle buone intenzioni, era appunto possibile grazie all'individuazione di una struttura intermedia fra le «*maternités* (ricoveri per le donne puerpere) e le *salles d'asile*, ove i bambini venivano accolti dopo i due anni» (p. 35). L'evoluzione della *crèche* in Francia avrebbe non a caso rispecchiato la sua genealogia, da ricondurre a una preoccupazione al medesimo tempo etico-religiosa e sociale, per la tutela di quella fascia della popolazione infantile a rischio di abbandono in varie forme, prima e dopo la chiusura delle ruote. Questo portava – in modo del tutto coerente, proprio perché era in gioco la vita stessa dei bambini – a una particolare attenzione agli aspetti igienici e sanitari, ponendo le basi di una moderna puericoltura, lungo una linea che avrebbe segnato i successivi decenni fra Otto e Novecento e influenzato fortemente gli altri esperimenti europei. Se nel caso dell'Inghilterra la diffusione delle *day nurseries* è meno incentivata – all'interno di un sistema che privilegiava una scelta di aiuti a domicilio – molto interessante è la ricezione del modello francese all'interno della Germania e della Russia zarista, che poi il Terzo Reich e l'Unione Sovietica potenziarono ulteriormente nel quadro ideologico dei rispettivi regimi: il primo ponendo l'accento sull'igiene sociale e sempre più sull'eugenetica, il secondo su un orientamento pedagogico che avrebbe fatto dell'asilo nido un'istituzione a carattere educativo, destinata fra l'altro a sopravvivere allo stalinismo.

L'analisi della situazione italiana – alla quale è dedicata l'ultima parte del volume – si fa in tal modo assai più ricca. Dopo la ricostruzione dell'esordio milanese, di cui si è detto all'inizio, anche le fasi successi-

ve vengono opportunamente ricondotte a uno scenario d'insieme che abbraccia il grande cantiere aperto, sul piano educativo, nella penisola all'indomani dell'Unità. In un intreccio fra la dimensione sociale, quella caratteristica dell'istituzione ai suoi inizi, e gli aspetti sanitari e legislativi – con una «pedagogia empirica» per bambini lattanti e svezzati che assume sempre maggiore importanza – vengono ricostruite le esperienze più significative del Paese. Pagine di grande interesse sono dedicate a Giuseppe Tropeano e al «presepe» dell'Ospedale dell'Annunziata di Napoli, a Ernesto Cacace e all'Istituto nipiogienico della città partenopea, a Ernesto Soncini e all'Istituto Pro-lattanti di Mantova, delineando un quadro assai complesso di fermenti innovativi e di ricadute positive sulla società, anche nella prospettiva un'immagine più favorevole e moderna della donna, della famiglia, dei bambini.

L'evoluzione normativa culminò poi nella riforma del 1923, effettivo momento di svolta rivolto sia agli istituti per lattanti sia ai brefotrofi, accomunati in un progetto indirizzato ancora una volta a combattere la mortalità infantile e a prevenire l'abbandono, sulla base dei risultati della «nipiologia» allora al centro di convegni e dibattiti scientifici. La competenza nel settore attribuita poco dopo all'Opera nazionale per la protezione della maternità e dell'infanzia (Onmi), che pur si avvaleva della rete delle strutture esistenti, favorì indubbiamente la diffusione degli asili nido fra campagne, città e stabilimenti industriali. All'interno delle «Case della madre e del bambino» divenne poi centrale la sua presenza, con uno sviluppo più accentuato nella seconda metà degli anni Trenta.

Sono al tempo stesso gli anni in cui si ponevano i fondamenti di una psico-pedagogia della prima infanzia, con il decisivo contributo di Enzo Bonaventura e Maria Montessori, anche se la politica del regime

e in seguito la legislazione razziale avrebbero impedito la prosecuzione della loro opera in Italia. I risultati di questa stagione rappresentano in ogni caso la premessa delle realizzazioni del dopoguerra, con i loro importanti traguardi e soprattutto la raggiunta acquisizione dell'asilo nido come «spazio pedagogico», in una «nuova consapevolezza di fronte alla maternità e alla paternità all'insegna di una cittadinanza attiva e democratica» (p. 346). Si coglie qui l'esito di un percorso importante e sofferto, che il lavoro di Dorena Caroli restituisce alla storia dell'educazione.

*Edoardo Bressan*

**Giuseppe Bertagna (a cura di), *Il pedagogista Rousseau. Tra metafisica, etica e politica*, Brescia, Editrice La Scuola, 2014, 320 pp.**

Ci sono sfide che vale indubbiamente la pena di raccogliere, come quella legata a una polemica antirousseauiana già viva nell'ultimo Settecento e che, per così dire, culmina nell'idea di Jacob Talmon di una «democrazia totalitaria» riconducibile al pensatore ginevrino o più di recente nelle osservazioni di Robert Spaemann sull'irriducibile soggettivismo del suo pensiero, che può dar luogo a esiti diversi ma tutti lontani da una prospettiva non teleologica di natura, in aperta opposizione all'eredità classica e cristiana. Eppure resta la percezione di giudizi non convincenti, che in fondo rappresentano il rovesciamento delle tante interpretazioni di segno opposto: ne discuteva di recente Sergio Belardinelli, riferendosi al pensiero di Rousseau come a un grande laboratorio, in cui ritrovare elementi non scontati di riflessione sul piano antropologico, su quello politico e su quello pedagogico, tre piani inevitabilmente connessi ma dei quali il terzo è sta-



to troppo a lungo interpretato in subordinato ai primi due.

Il convegno svoltosi a Bergamo del 2012, di cui il volume curato da Giuseppe Bertagna pubblica gli atti – con l'eccezione della parte su *Rousseau e le donne*, già edita, sempre per La Scuola, a cura di Carla Xodo – ha risposto indubbiamente a questa importante sfida, con risultati di indubbio interesse proprio a partire dall'aver scelto come tema e come punto di osservazione quello del Rousseau «pedagogista». L'ampio saggio dello stesso Bertagna (*Una pedagogia tra metafisica ed etica*, nella prima parte intitolata *Tra pedagogia ed educazione*) coglie subito il punto, notando come molti fraintendimenti sul carattere totalitario del pensiero rousseauiano vadano ricondotti alla quasi programmatica confusione fra «ambiti tra loro diversi e che tali, in Rousseau, dovrebbero restare», pur nelle «reciproche interrelazioni» (p. 24). L'*Emilio* non può dunque essere letto in funzione del *Contratto sociale*, alla stregua di un manuale che assicuri l'inserimento del soggetto all'interno di un progetto politico. Ma qui, osserva Bertagna, occorre inserire «la differenza pedagogica fondamentale tra l'uomo 'persona' e l'uomo 'individuo'». Se quest'ultimo ha senso «in quanto parte di un intero che lo sopravanza», sul piano storico-sociale e anche su quello ambientale e organico, la persona è essa stessa «un intero relazionale in sé» (pp. 64-65). Ci si trova così di fronte a una visione per molti versi premoderna e in ogni caso antiperfettistica, capace di salvare l'unicità della persona e la stessa apertura alla trascendenza, al di là dell'evoluzione, pur sempre estrinseca, dalla natura alla civiltà.

Non per questo il rapporto fra l'*Emilio* e il *Contratto sociale* è meno importante, come sottolineano altri interventi della prima parte. Al di là della loro vicinanza di composizione e del loro intreccio espli-

citato dall'autore stesso, inserendo nel primo il *sommaire* del secondo, la prospettiva – come afferma Egle Becchi – è quella di indicare «una comunità dove tutto è a misura dell'uomo» e «un contesto di esistenza possibile e plausibile», definito non dalla *ville* sproporzionata e anonima ma dalla *citè*, che richiama la polis dell'antichità greca (p. 69). Il «messianismo politico», spesso riferito al ginevrino come a un antesignano di Marx, va – secondo Giuliano Minichiello – ridimensionato alla luce dell'insistenza sulla «formazione della persona» che permette «quella del cittadino», in una visione che mette al centro «l'uomo come universo morale fondato sulla persona e la scrittura, come medium della moralità generale» (p. 88). Rousseau si pone allora, come sottolinea Giuseppe Mari, «tra culmine e superamento della modernità», perché rispetto a quest'ultima è in grado di valorizzare la «dimensione storico-relazionale» al di là di un paradigma meramente «matematico-formale», analogamente a Pascal, Vico e Dilthey. Al tempo stesso, una rivisitazione di Rousseau consente di ripensare all'educazione non già quale apprendimento ma quale «conquista della moralità» (pp. 112-113). Sono indicazioni da riprendere, come confermano i successivi contributi di Andrea Cegolon sull'importante rapporto fra Rousseau e Quesnay e di Andrea Potestio sul ruolo del linguaggio all'interno di una proposta educativa che rimanda al nesso fra identità soggettiva e alterità.

Il volume dedica poi una seconda sezione a *I legami etico-politici*, in cui si approfondiscono le implicazioni ulteriori di un pensiero tutt'altro che chiuso in se stesso, in un orizzonte interpretativo di sicuro rilievo. Dopo le suggestive pagine di Raymond Trousson sull'«eziologia del ricordo» d'infanzia e di giovinezza, Roberto Gatti mette a fuoco la complessa interazione fra il problema del male,

da una parte, e l'educazione e la politica, dall'altra: ed è proprio l'«intrascendibile presenza del male» a rendere impossibile quel suo «oltrepassamento» che è al centro della proposta dell'*Emilio*, senza essere in grado di ricomporre la frattura fra *homme naturel* e *homme civil* (p. 177). Si tratta, a ben vedere, dei temi su cui si sarebbero confrontati i maggiori interpreti di Rousseau, accompagnando gli snodi decisivi della filosofia politica. Gianfranco Dalmasso affronta non a caso il «Rousseau di Hegel» e Guglielmo Forni Rosa la lettura fattane da Karl Barth, che segue il percorso che va dal «Rousseau romantico» alla teologia del protestantesimo liberale. Si resta però nel quadro di un riferimento all'«onnipresenza del modello antico», come sottolinea Maurizio Griffo sulla base della vasta produzione politico-costituzionale di Rousseau: un modello all'interno del quale vanno ricondotte, nel segno della virtù civica, anche «le nozioni più innovative (come la volontà generale) o chiaramente orientate contro il privilegio (come l'ideale del governo delle leggi)» (p. 211).

La terza sezione del volume, dedicata a *La ricezione del pensiero rousseauiano*, si rivela a sua volta di notevole interesse e spessore, costituendo non solo una verifica fattuale delle riflessioni a cui si è fatto cenno, ma anche una loro rilettura attraverso il confronto con le esperienze di diversi Paesi. Le riflessioni di Simonetta Polenghi, che prendono in esame l'area austro-tedesca da Lessing a Milde, documentano infatti tutta la problematicità della trasmissione del pensiero rousseauiano, legata a ragioni politiche ma nondimeno riconducibile al suo carattere contraddittorio e aporetico, in grado di giustificarne la lettura «idealistica» di Kant e ancora di più quella «rivoluzionaria» di Marx e Engels, con il suo inevitabile approdo prescrittivo. In una teodicea secolarizzata e

in fondo pelagiana, il male si colloca nella storia e fuori dall'uomo, «che non è cattivo, bensì lo è diventato» (pp. 224-225). Questo non ha tuttavia impedito l'ampia diffusione dei principi più innovativi della pedagogia rousseauiana, imperniati sulla centralità del bambino e sull'attenzione alle fasi evolutive del suo sviluppo.

Ci si trova comunque di fronte a una ricezione fortemente condizionata da circostanze esterne, che nel caso spagnolo, affrontato da Antonio Viñao, portano da un lato all'apprezzamento dei settori liberali e progressisti e dall'altro a una condanna senza appello di quelli legati al conservatorismo politico e religioso. La situazione della Russia fra Sette e Ottocento, studiata da Dorena Caroli, si rivela di insospettata vivacità, per quanto riguarda sia le «istituzioni educative», partendo dalle riforme dell'epoca di Caterina II, sia la «formazione politica» delle nuove generazioni dell'*intelligencija* (p. 251). È un processo legato strettamente all'uropeizzazione della Russia e al tempo stesso a una sua lettura democratica e persino rivoluzionaria, soprattutto attraverso la riflessione e l'esperienza di Tolstoj, con le molte opposizioni incontrate e le prospettive che avrebbe aperto.

Anche la ricezione italiana alla vigilia della Grande Guerra, analizzata da Adolfo Scotto di Luzio, va ricondotta a un dibattito più ampio, con due punti di riferimento nei quali si collocano Giovanni Gentile e Rodolfo Mondolfo: ed è su queste basi che, nel 1923, la «questione pedagogica» si sarebbe fatta, nella critica gentiliana al «falso universalismo» di Rousseau come espressione di un individualismo atomistico, «questione politica» (p. 283). L'ultimo contributo, di Giuseppe Zago, esamina la successiva lettura dell'*Emilio* da parte di Giuseppe Flores d'Arcais, lettura che fa proprie molte riserve ma non manca di sottolinearne l'apporto decisivo

a ogni moderna teoria dell'educazione, non esitando ad affermare che «Rousseau è la stessa pedagogia» (p. 305). Si tratta di un'espressione che in effetti conclude nel modo più efficace questo volume e che davvero indica la ricchezza e la complessità del lascito ideale di Rousseau.

*Edoardo Bressan*

**Giorgio Chiosso, *La pedagogia contemporanea*, Brescia, La Scuola, 2015, 268 pp.**

L'ultimo lavoro in ordine di tempo di Giorgio Chiosso costituisce la tessera conclusiva di un ideale mosaico che lo studioso piemontese è andato componendo negli ultimi anni. Dopo aver studiato le teorie pedagogiche novecentesche – presentate nel fortunato manuale intitolato *Novecento pedagogico* (Brescia, La Scuola, 1997) – Chiosso ha rivolto l'attenzione alla contemporaneità, indagata a partire dalle *Teorie dell'educazione e della formazione* (Milano, Mondadori Università, 2004), dove la sparizione dal titolo di ogni riferimento alla pedagogia non è assolutamente casuale. Si tratta infatti di un tema foriero di riflessioni sviluppate a partire dal progressivo ridimensionamento del ruolo del sapere pedagogico nella cultura contemporanea, argomento che, circoscritto al panorama nazionale, è stato oggetto nel presente volume di pagine interessanti e ricche di spunti.

La principale differenza rispetto alle due opere citate risiede nell'attenzione riservata esclusivamente alla riflessione pedagogica italiana, e in particolare alle due generazioni di studiosi che si sono avvicinate a partire dal secondo dopoguerra. L'arco cronologico considerato è dunque quello della stretta contemporaneità, con il capitolo conclusivo dedicato agli anni di passaggio tra i due secoli.

Quando la lente dello storico si avvi-

cina a tal punto ai giorni nostri, il rischio maggiore è quello di una deformazione, vuoi per difetto di imparzialità rispetto alle vicende analizzate, vuoi per difficoltà a individuare delle chiavi interpretative adeguate. In questo volume, invece, ciò che maggiormente impressiona il lettore è la lucidità di riflessione e di sintesi dell'autore, nonostante sia stato un protagonista autorevole della scena pedagogica, quindi direttamente coinvolto nei dibattiti tra le varie scuole che si sono a lungo confrontate – quando non contrapposte – in Italia.

I cinque capitoli che compongono il volume possono essere considerati come altrettanti saggi dedicati a un differente periodo della storia repubblicana, non necessariamente coincidente con una rigida scansione per decenni, ma connesso piuttosto ai profondi mutamenti in corso nel Paese a livello sociale, culturale, economico; mutamenti che, secondo un'ambiziosa visione figlia di un «pensiero pedagogico forte», dovevano essere monitorati, guidati per certi versi, sempre avendo come fine la formazione dell'uomo, seppur con declinazioni (anche profondamente) diverse secondo le varie correnti di pensiero. Al di là degli schieramenti ideologici differenti e delle divergenze di visioni tra neoidealisti, personalisti, neoilluministi deweyani, emerge infatti la forte valenza etica – e i relativi risvolti politici – del discorso pedagogico, inserito a pieno titolo nel più ampio dibattito intorno alla rinascita democratica e culturale del popolo italiano attraverso la democratizzazione della scuola e della società. È insomma un sapere pedagogico consapevole del proprio ruolo e per nulla intimorito dalle sfide poste dal mutare dei tempi, e con essi dei desideri, dei sogni, delle ambizioni di un Paese in forte sviluppo, ma ancora sostanzialmente legato a una precisa identità e a un *ethos* comunitario che si ponevano come precisi fini dell'azione educativa se-

condo un'ampia fetta del pensiero pedagogico di allora.

La riprova della centralità non solo del discorso pedagogico, ma anche delle questioni educative e scolastiche nella riflessione sullo sviluppo del Paese si può cogliere nei dibattiti che portarono alla nascita della nuova scuola media e che videro la partecipazione, ampia e qualificata, di molti rappresentanti del mondo culturale di allora. Chiosso sostiene che le tesi suffragate dai diversi schieramenti, vale a dire dai sostenitori del corso post elementare e da quelli di una scuola media unica, riflettessero due diverse idee di sviluppo per l'Italia; parole che dovrebbero suonare scontate per un Paese deciso a investire nell'istruzione, ma che oggi rischiano di ingenerare solo un senso di nostalgica utopia.

A ulteriore riprova di quanto detto, basti pensare che alla metà degli anni Sessanta uno studioso come Aldo Agazzi poteva spingersi fino a teorizzare la formazione di una «società educatrice» nella quale erano chiamati a interrogarsi sulle modalità e i fini dell'educazione non solo istituzioni e figure tradizionalmente deputate a tali scopi, ma la società tutta, compresi il mondo della politica, i sindacati, le aziende, i grandi mezzi di comunicazione. Gli stessi movimenti contestatari e le correnti ispirate alla cosiddetta antipedagogia non facevano, con le loro tesi, che certificare il ruolo fin lì svolto dall'educazione e dalla scuola, quest'ultima additata come potente strumento di trasmissione delle ingiustizie e di condizionamento sociale, con la conseguente necessità di legare a doppio filo pedagogia e riforme scolastiche a un disegno politico di segno maggiormente progressista.

Nel corso degli anni Settanta si levarono tuttavia anche voci critiche, frutto di riflessioni pedagogiche anticipatrici che solamente negli anni successivi avrebbero trovato un fertile terreno di coltura. L'au-

tore – la cui attenzione nei confronti delle «avanguardie» del pensiero pedagogico permette al lettore di cogliere l'evolversi delle diverse sensibilità – cita ad esempio i nomi di Giuseppe Catalfamo e Giovanni Maria Bertin, meno interessati all'analisi politica o ai risvolti ideologici e al contempo sostenitori del ruolo attivo del soggetto nella scelta degli orientamenti di valore. Non è dunque difficile cogliere in un certo senso i prodromi di quella tendenza, giunta poi a maturazione estrema più tardi, al relativismo anche in campo etico, al prevalere dei diritti del singolo sulla condivisione di valori che un tempo si sarebbero detti tradizionali e, in quanto tali, nazionali.

Anche la cultura scolastica si sarebbe presto smarcata dall'oneroso impegno di matrice politica per rifugiarsi in un più scientifico – ma anche più asettico, conclusa la stagione delle vibranti passioni civili – pragmatismo di marca neocomportamentista, tutto incentrato sui processi di apprendimento/insegnamento, sulle teorie curriculari, sull'organizzazione razionale dei contenuti.

Il contesto entro il quale maturarono questi orientamenti è quello che vide il passaggio dalla pedagogia alle scienze dell'educazione: alla perdita di autonomia coincise, secondo alcuni osservatori, il venir meno del preminente ruolo che fin lì si era arrogato il sapere pedagogico all'interno della storia culturale italiana. Le ripercussioni di tale disorientamento furono evidenti anche solo a livello semantico: Chiosso sottolinea infatti come numerosi saggi pubblicati tra gli anni Ottanta e Novanta riportassero nei titoli espressioni ricorrenti quali crisi, ricerca di senso, bisogno di valori, etc.

In tempi di pensiero debole, di tramonto di valori universalmente condivisi, di fine delle grandi narrazioni, la pedagogia cercava rifugio nei più placidi porti della ricerca educativa e della «didattica posta a

disposizione degli apprendimenti e dell'organizzazione dell'istruzione». Sono queste le pagine nelle quali più cupe si fanno le analisi dell'autore: non è difficile leggere tra le righe una sorta di malcelata amarezza per il progressivo indebolimento della pedagogia come «soggetto pubblico», con i risvolti di cui s'è detto. L'autore non cede tuttavia alla tentazione di celebrare il *cupio dissolvi* della pedagogia («il pedagogico non è scomparso, ha soltanto mutato fisionomia»), ma offre alcune brevi riflessioni sulle questioni vitali alle quali è chiamato a rispondere il sapere pedagogico se vuole tornare a orientare la riflessione sul presente e sui fini dell'educazione.

In conclusione, il volume di Giorgio Chiosso, scritto col consueto stile chiaro e di piacevole lettura, rappresenta uno strumento prezioso per chi cerchi chiavi interpretative grazie alle quali orientarsi nelle principali riflessioni pedagogiche elaborate in Italia negli ultimi settant'anni. In una parola, per comprendere e valutare, attraverso un'attenta anamnesi, l'attuale stato di salute della pedagogia; un passo fondamentale per farle riacquistare un ruolo primario nella vita culturale e scolastica nazionale.

*Fabio Targhetta*

**Michela D'Alessio, *A scuola fra casa e patria. Dialetto e cultura regionale nei libri di testo durante il fascismo*, Lecce-Brescia, Pensa MultiMedia, 2014, 270 pp.**

«Io ho due case: una piccola e una grande, immensa. Nella casa piccola, vivo col babbo, con la mamma e coi fratellini. Nella casa grande, che si chiama Italia, io faccio parte di una famiglia numerosissima: la famiglia degli Italiani». Con questa citazione, estrapolata da un dettato rivolto a una scolaresca molisana del 1932,

Michela D'Alessio apre il suo volume, attraverso il quale percorre il tema del dialetto e della cultura regionale nella manualistica scolastica durante il primo fascismo, muovendosi lungo la traiettoria dalla «piccola» alla grande Patria, consegnata all'indovinato titolo *A scuola fra casa e patria*. Nei continui passaggi dalla cultura regionale a quella nazionale proposti nei libri di testo, l'autrice raccoglie tutti gli elementi, provenienti non solo dalla storiografia storico-educativa, ma anche dalle scienze sociali e dagli studi propriamente storici e linguistici, utili a individuare le esatte coordinate del contesto politico, culturale ed educativo di appartenenza di un fenomeno scolastico-editoriale finora solo parzialmente indagato della storia della scuola nazionale. Il ricco apparato di note che accompagna il testo denota, infatti, un rigore e un approccio metodologico aggiornato e di largo respiro. La cornice normativa delineata attraverso lo spoglio minuzioso dei repertori legislativi inquadra le vicende di questa tipologia libraria scolastica che è stata trattata su diversi piani da numerosi contributi di ambito storico-scolastico e linguistico, di cui l'autrice dimostra di possedere una buona conoscenza e di cui offre puntualmente una lettura organica e critica. La qualità dello studio condotto sui manuali dialettali e sugli almanacchi regionali prodotti dal 1923 al 1927, ora sistematicamente classificati e ordinati, dichiara l'adesione della studiosa agli orientamenti della recente storiografia scolastico-educativa che trova nel vissuto scolastico, di cui sono parte integrante i libri di testo, un sottosuolo ricco dal quale estrarre interessanti elementi per la comprensione della funzione dell'insegnamento, delle pratiche didattiche utilizzate per la trasmissione delle conoscenze disciplinari, e dei modelli educativi e comportamentali. Il tema della manuali-

stica scolastica regionale e dialettale, avviene, così per Michela D'Alessio, un mezzo per comprendere, integrare ed arricchire «la prevalente ufficialità delle rappresentazioni consegnateci a lungo dalla storia delle istituzioni, nel passato, con un interesse aggiornato per la conoscenza delle culture scolastiche e dei costumi educativi». Nello specifico, la produzione editoriale oggetto del suo studio appare funzionale alla comprensione degli indirizzi della politica educativa volti alla «valorizzazione della cultura regionale e dei patrimoni dialettali dai programmi varati da Giuseppe Lombardo Radice a seguito della riforma Gentile». All'interno di questa pluralità di fonti la studiosa si orienta con destrezza facendo costante riferimento agli strumenti repertoriali suddivisi per discipline dedicati all'editoria scolastica e alle relative fonti normative, la cui realizzazione, avviata a partire dalla fine degli anni Ottanta, ha visto il coinvolgimento di nomi importanti del panorama storico-educativo nazionale, tra cui Giorgio Chiosso, Roberto Sani, Anna Ascenzi, Carmen Betti, Alberto Barausse. Attraverso l'indagine intorno agli almanacchi regionali e agli esercizi di traduzione dal dialetto la D'Alessio aderisce a questa fortunata tradizione storiografica che, da un lato, procede alla raccolta e alla catalogazione della documentazione archivistica e a stampa delle fonti normative intorno ai testi scolastici e, dall'altra, alla ricerca sui contenuti, sui modelli e i valori trasmessi dalla manualistica scolastica. In linea con gli indirizzi di tali studi l'autrice redige un repertorio interamente dedicato alla produzione di segno dialettale e regionale rivolta alla scuola elementare, edita durante il fascismo. Il repertorio è articolato nelle tre appendici che compaiono in coda al volume, ciascuna dedicata allo sviluppo di uno specifico campo. L'*Appendice a* rac-

coglie i titoli della pubblicistica pedagogico-educativa in cui si alimentò il dibattito intorno al tema del dialetto e della cultura regionale prodotta tra il 1910 e il 1940; l'*Appendice b* riporta in tabelle suddivise per case editrici gli almanacchi regionali pubblicati tra il 1924 e il 1927; infine, l'*Appendice c* restituisce, organizzati in tabelle, i titoli dei testi di esercizi di traduzione dal dialetto alla lingua. Tale repertorio è sicuramente uno degli aspetti che aiuta ad apprezzare con maggiore immediatezza la qualità del lavoro di ricerca che il volume presenta, non solo per la qualità e la quantità delle notizie raccolte, ma anche in considerazione della difficoltà di reperimento dei testi scolastici dialettali che, a differenza degli almanacchi – come afferma l'autrice – «che hanno con frequenza conosciuto una rinnovata attenzione a livello locale, in alcune ristampe orbitanti intorno allo studio delle tradizioni del folklore regionale», furono «prima pensati e poi scomparsi del tutto dai cataloghi editoriali e dai banchi di scuola, oltre che ovviamente dai programmi normativi, nelle sabbie di un insuccesso prima latente e poi definitivo nelle pratiche d'insegnamento della lingua italiana». Le difficoltà d'ordine didattico, oltre che di politica scolastica, collegate al metodo promosso da Lombardo Radice «dal dialetto alla lingua» vengono ripercorse attingendo peraltro ad alcune utilissime relazioni di ispettori scolastici che proiettano lo sguardo verso la ricezione contemporanea delle indicazioni dei nuovi programmi nelle aule elementari. Il risultato è in ogni caso soddisfacente: la ricerca riesce a fare luce attraverso l'analisi di tale produzione dell'editoria scolastica su molte questioni della politica educativa del tempo senza lasciare zone d'ombra. All'interno del contesto politico, educativo, normativo, culturale e pedagogico puntualmente ricostruito, Mi-

chela D'Alessio rintraccia le premesse nelle quali germinarono i programmi lombardiani che rappresentarono «il punto di approdo» delle questioni linguistiche e culturali emerse all'indomani dell'Unità e protratte per i primi due decenni del Novecento. L'analisi di tale parentesi scolastico-editoriale consente all'autrice anche di recepire i contenuti della missione politica affidata dal fascismo alla Commissione centrale per l'adozione dei libri di testo di veicolare il sentimento di italianità e di appartenenza alla patria nelle nuove generazioni, puntualmente recepita e abbracciata anche dai direttori delle collane editoriali regionali pubblicate dalle maggiori case editrici tra il 1924 e il 1927, e di registrare gli esiti fallimentari della politica di valorizzazione del regionalismo scolastico amministrativo e didattico (ereditato da Radice in particolare da Crocioni e da Harasim). L'analisi di questa tipologia di produzione editoriale offre alla studiosa l'occasione di scardinare la visione che attribuisce unicamente la fase di fascistizzazione della scuola elementare all'avvento del libro unico di stato, invitando a cogliere attraverso di essa «tutta la complessità e gradualità del processo di nazionalizzazione e di totalitarismo formatore che il fascismo condusse nella sua parabola ventennale, intercettando nel libro scolastico lo strumento insostituibile del tentativo di controllo politico, operato a partire dalla scuola primaria e dai suoi piccoli alunni». La ricerca oltre a ricollocare le vicende del libro all'interno di quelle più ampie della politica scolastica e linguistica del fascismo, procede a una loro analisi dal punto di vista didattico e uno squisitamente editoriale. L'autrice considera tali testi oltre che veicoli necessari all'attuazione di una didattica funzionale al programma politico educativo del regime, prodotti di un mercato editoriale regolato

da precise dinamiche economiche, imprenditoriali e politiche editoriali «non sempre sufficientemente soppesate» dal quale la produzione analizzata non sfugge. Il volume della D'Alessio si colloca nell'ambito delle attività di ricerca condotte dal «Centro di documentazione e ricerca sulla storia delle istituzioni scolastiche, del libro scolastico e della letteratura per l'infanzia» dell'Università degli Studi del Molise, di cui è espressione la Collana «Biblioteca Ce.S.I.S.», diretta da Alberto Barausse, in cui è stato accolto.

Valeria Viola

**Florindo Palladino, *Scuola e società nel Meridione preunitario. Istruzione secondaria e formazione delle élites dirigenti in Molise (1806-1848)*, Macerata, eum, 2015, 390 pp.**

Il testo di Palladino si colloca in un filone di studi poco esplorato e rappresenta un valido strumento storiografico per la ricostruzione del «sistema di pubblica istruzione» a partire da un elemento storico non sempre preso nella dovuta considerazione per la corretta lettura della storia dell'istruzione nell'Italia meridionale nella prima metà dell'Ottocento: la riforma dell'istruzione attuata nella Francia imperiale da Napoleone e i conseguenti riflessi nel Regno di Napoli. Il modello di istruzione francese impostato, grazie alla riforma dell'*Université impériale*, su un sistema di pubblica istruzione centralizzato, verticalizzato e diviso prospetticamente in tre ordini (primario-secondario-superiore), risulta illuminante per la comprensione del processo storico che porterà alla nascita dell'istruzione secondaria nell'Italia Meridionale e al costituirsi del processo di formazione delle élites dirigenti. In tale contesto, la ricerca di Palladino fa propria l'attuale esigenza

di rinnovamento metodologico e critico, proponendo uno studio di caso che coniuga l'esigenza della ricostruzione locale con una lettura storiografica di più ampio respiro, in grado di chiarire l'origine e di gettar nuova luce sul binomio «scuola e società» nel Meridione preunitario.

La solidità dell'opera è caratterizzata soprattutto dall'assiduo ricorso alle risorse documentarie, analizzate dall'autore in maniera critica e approfondita, costituite fonti d'archivio finora inesplorate, per profilare la nascita e lo sviluppo dell'istruzione secondaria nella Provincia di Molise, nel periodo compreso tra il 1806 e il 1848. Lo studio ha inoltre il merito di recuperare ed evidenziare il contributo di profili importanti ma poco noti per lo sviluppo dell'istruzione secondaria nel Mezzogiorno, come quello dell'intendente molisano Biase Zurlo, grazie al quale fu possibile l'istituzione del Real Collegio Sannitico di Campobasso (1812-1816), delle scuole secondarie a indirizzo umanistico della Provincia (1816-1820), e delle prime scuole di agricoltura pratica in tutto il territorio del Regno (1817-1819). Palladino non tralascia di analizzare anche gli organi sorti per la gestione del sistema di pubblica istruzione. Tra questi merita rilevare l'operato delle Giunte di scrutinio che, istituite in reazione ai moti del 1820, costituirono un'involuzione del processo scolastico secondario appena avviato in Molise. La Giunta di scrutinio per l'istruzione operò, infatti, per un processo di epurazione della classe docente, dopo aver indagato sulle singole condotte politiche e morali aggravando non poco le difficoltà organizzative. Il caso di studio è costituito dal Collegio Sannitico di Campobasso, la cui storia è inquadrata in un contesto sociale molto più ampio, le cui linee fondamentali conducono allo sviluppo dell'istruzione secondaria nella Provincia di Molise nel periodo compreso tra il governo dei Napoleonidi

e il 1848. La vicenda del Collegio diventa caso esemplare per la comprensione del più ampio processo storico che interessò il Regno di Napoli e delle Due Sicilie, sottoposto ad un'attenta analisi in cui le fonti d'archivio sul tema appaiono per la prima volta organizzate in un processo di lettura storiografica organica.

La nascita del Collegio generata dall'accresciuto bisogno formativo e da una volontà di diffusione dell'istruzione, assunse un ruolo laico e fondante per l'intera popolazione dopo la svolta della soppressione del tradizionale canale ecclesiastico di formazione, ma l'aspetto più rivoluzionario dal punto di vista sociale, in particolar per le élites locali, è dato dall'occasione di garantire l'acquisizione di quel titolo di studio che, sostituendo definitivamente il titolo nobiliare, consentì di meritare potere e prestigio, formando la nuova classe dirigente basata sul «notabilato». Lo studioso si è avvalso di un ampio ventaglio di fonti conservate presso l'Archivio di Stato di Napoli e quello di Campobasso, e presso l'Archivio storico del «Mario Pagano» (la nuova denominazione del Collegio Sannitico dal 1865, poco prima dell'abbattimento della struttura storica del Collegio e la edificazione della nuova struttura a partire dagli anni Settanta dell'Ottocento). La ricostruzione storica riproduce il percorso fatto dall'autore tra le diverse fonti, dagli atti ufficiali alle comunicazioni amministrative, integrate con le circolari presenti nel *Giornale della Intendenza di Molise*.

Tale ricostruzione è opportunamente integrata con utili profili biografici ricavati dai fascicoli personali dei docenti, vicerettori e rettori del Collegio; e da una scrupolosa attenzione rivolta allo spoglio sistematico degli Atti di Stati Civili (nascita, matrimonio e morte) finalizzato ad indagare il profilo sociale e l'esito formativo degli studenti del Collegio. Infine, Il meto-



do prosopografico ha consentito all'autore di sviluppare un'analisi accurata dell'intero corpo docente ricorrendo a quattro parametri: lo status (laico o ecclesiastico); la qualifica (titolare o interino); la provenienza e la permanenza nel collegio. La ricostruzione che ne deriva, per metodo utilizzato e risultati ottenuti, è unica nel suo genere nel panorama degli studi e merita una particolare attenzione. Completano lo studio le Statistiche della popolazione della Provincia di Molise (rintracciate nell'Archivio di Stato di Napoli), che permettono di comprendere la reale incidenza della formazione nel processo sociale. Queste analisi hanno permesso di ricostruire in maniera chiara il quadro storico e sociale della Provincia di Molise avviata proprio in questo periodo verso un difficoltoso percorso, fatto di corsi e ricorsi, verso un processo di modernizzazione ancora in stato embrionale ma in via di definizione. Il volume presenta anche delle ricche Appendici che aprono nuovi spiragli interpretativi storici e possibili sviluppi di indagini in un contesto di *Digital Humanities*.

Utile, per lo studio argomentato da Palladino, è l'elenco degli alunni interni al Collegio Sannitico dal 1817 al 1834 che hanno permesso la lettura sociale proposta dall'autore; altrettanto interessante la ricostruzione della collezione libraria della Biblioteca del Collegio Sannitico, il cui primo fondo risale al 1819, composta, nel 1854, da circa 2500 volumi, il cui elenco è riportato in Appendice. Il rapporto dell'ispettore D. Orofino sul Collegio Sannitico, del 1822, unito alla planimetria e al prospetto dell'edificio, restituiscono un'immagine nitida degli spazi e delle dotazioni del Collegio che Palladino ripropone in Modellazione 3D nella copertina del volume, prospettando un interessante percorso di *Virtual Cultural Heritage*.

Rossella Andreassi

Valeria Miceli, *Formare maestre e maestri nell'Italia meridionale, Lecce-Brescia, Pensa MultiMedia, 2013, 380 pp.*

Il volume di Valeria Miceli s'inscrive significativamente in uno dei filoni emergenti della ricerca storico-educativa, contribuendo ad una graduale integrazione dell'auspicata ricomposizione della «geografia dell'educazione» in Italia. Lo studio ha inaugurato la Collana «Biblioteca Ce.S.I.S.» diretta da Alberto Barausse ed è espressione dell'attività di ricerca storico-educativa condotta nell'ultimo decennio dal gruppo di lavoro gravitante intorno allo stesso «Centro di documentazione e ricerca sulla storia delle istituzioni scolastiche, del libro scolastico e della letteratura per l'infanzia» dell'Università degli Studi del Molise. Tre appaiono le cifre distintive del lavoro: la prima, d'ordine generale, riguarda la scrupolosa metodologia d'indagine che si appoggia su un ampio sostrato di fonti archivistiche raccolte e consegnate alla conoscenza generale, bilanciate tra quelle nazionali della scuola postunitaria e quelle locali dell'istruzione; la seconda è relativa alla parabola attentamente ricostruita ed implementata dei percorsi di istruzione e formazione della classe magistrale italiana nello snodo temporale postunitario, di segno politico e pedagogico, parabola che non tralascia l'accesso al vissuto scolastico aderente agli assunti fissati da Dominique Julia, sullo studio della cultura scolastica interessato alle norme ed alla pratica didattica; la terza, infine, aiuta a rilegare nella storia generale dell'istruzione normale e magistrale una pagina della storia territoriale italiana, il Meridione d'Italia, e in particolare uno spaccato locale, il Molise, solo negli ultimi anni fatto oggetto di attenzioni mirate di ricerca (Barausse, D'Alessio).

Il lavoro della Miceli, che riprende approfondendo alcune tracce dissodate

durante gli anni del dottorato di ricerca condotto con profitto nella Scuola di Macerata, mostra solidità di studio ed approccio metodologico di scavo documentale nel consegnare un contributo, nel campo scolastico-educativo a raggio locale osmoticamente rapportato agli sviluppi della politica scolastica nazionale, con cui va sensibilmente ad alimentare il tema dell'istruzione e formazione dei futuri maestri elementari italiani. Provando a soffermarsi sui nuclei inizialmente esposti, in prima battuta merita dare conto della ricchezza e pluralità di fonti utilizzate, di natura prevalentemente archivistica ed a stampa, nazionale e locale.

La documentazione archivistica è consegnata utilmente alla seconda parte di cui si compone il lavoro, andando a costituire un ponderoso *corpus* degli *Allegati* reperiti, consultati ed esaminati. Tra questi si segnalano le Circolari e le numerose Relazioni rintracciate nell'Archivio centrale dello Stato, specie nel fondo del ministero della Pubblica Istruzione, per le Leggi e i Decreti, di cui merita valutare la puntualità e ricchezza delle notizie attinte: tra le altre, sull'istituzione, le condizioni, i regolamenti, gli orari, gli stati degli insegnanti della scuola normale e poi magistrale campobassana; negli archivi storici comunali del Molise, depositi straordinari di vicende inerenti l'istruzione locale; negli archivi storici delle stesse istituzioni scolastiche del posto, vere miniere per la ricostruzione di quelle che sono state efficacemente definite delle vere «biografie storiche e didattiche» (Soldani) delle scuole disseminate su tutto il territorio nazionale.

La fondata strutturazione del lavoro si regge su una scansione dei capitoli che ripercorrono, a cominciare dalle fasi iniziali, la storia dell'istruzione normale e magistrale in Molise, apportando in un ricco apparato di note bibliografiche (quasi un percorso altro e parallelo che si offre al

lettore ed ancor più allo studioso) le specificità fin dalle origini dei provvedimenti di istituzione delle scuole magistrali, dapprima emanati dalla legge Casati. Con il decreto del 5 marzo 1861, attento alla peculiarità dell'ambito geografico considerato, si avviava infatti un progressivo incremento del sistema scolastico meridionale, prevedendo quale nuova sede di apertura anche quella di Campobasso. Si tratta di un filone intorno al rapporto tra maestri e istruzione (Sani, Tedde), alla nascita della maestra elementare (Soldani, Covato) sottratta alla dimensione letteraria che l'aveva a lungo circondata ed alla cultura pedagogica e professionale nella formazione del maestro italiano (Redi Sante De Pol, Chiosso, Ghizzoni ecc.) che si interessa alle vicende specifiche dei luoghi di formazione nelle aule postunitarie.

L'autrice ripercorre i passaggi fondamentali di miglioramento delle condizioni formative oltre che giuridico-economiche e sociali della figura del maestro nella società italiana, sullo scorcio dell'Ottocento, dal punto di vista interno alle complesse dinamiche scolastiche caratterizzanti le diverse realtà territoriali. Dalla nascita della Scuola magistrale normale femminile nel primo decennio postunitario si insegue l'ampio dibattito dell'amministrazione molisana rispetto ai gravi ritardi del quadro dell'istruzione locale, che condurranno al consolidamento della stessa istituzione soprattutto nei primi anni della sinistra storica e sulla spinta del riformismo scolastico tracciato dal ministro Coppino. Dopo le novità introdotte da De Sanctis e Baccelli, gli sviluppi dell'istruzione normale nella provincia molisana sono colti nel clima di rinnovamento didattico e pedagogico degli anni Ottanta, segnato dal positivismo. Il lavoro affronta poi – sempre collocandosi al punto di intersezione tra svolgimento degli orientamenti di politica scolastica, linee di sviluppo norma-

tivo e legislativo centrale e ricadute reali territoriali – le dinamiche proprie della stagione crispina in Molise, che porteranno alla soppressione della scuola maschile nel 1898 (di cui si ricostruiscono cause e modalità) ed al riordino successivo dettato dal ministro Gianturco, con la statizzazione della scuola normale femminile. La fine del secolo XIX rappresenta il limite temporale, politico, normativo del puntuale quadro ricostruttivo, in particolare, del complesso ed articolato rapporto tra potere centrale ed autorità periferiche, che nella corrente attuale della ricerca riserva un grado di attenzione importante, intorno a quella che oggi è invocata non più e non solo come storia scolastica nazionale ma piuttosto fatta da una pluralità e varietà di storie della scuola italiana (D'Ascenzo).

In tale direzione la monografia della Miceli aggiunge una molecola significativa dei processi scolastici in area meridionale. Lo studio di caso del Molise si offre, infatti, quale segmento del molteplice tessuto scolastico dell'Italia postunitaria, sottratto alla visuale esclusivamente nazionale, a lungo frequentata dalla storiografia scolastico-educativa, in un acquisto superamento dell'identificazione tra scuola legale e scuola reale. Il volume della studiosa si colloca su questo versante di storia locale e territoriale, focalizzando con un'adeguata strumentazione di metodo, di fonti e di interpretazione critica le vicende della scuola normale inizialmente maschile molisana, intercettando peraltro opportunamente nella presenza delle istituzioni scolastiche una delle leve del processo di urbanizzazione di Campobasso, negli anni postunitari, in cui la città si definì nella sua fisionomia di capoluogo. La vicenda storica, intagliata in quella nazionale, l'avvicinamento al compito di mediazione politica, pedagogica e didattica dal centro alla realtà provinciale

svolto dagli amministratori locali, con gli ispettori e i direttori didattici; l'incursione nella vita scolastica reale e quotidiana; la ricostruzione delle fisionomie dei docenti; la puntuale ricognizione del patrimonio librario della biblioteca scolastica e pedagogica presente nella scuola a fine Ottocento; la ricomposizione non solo descrittiva dei tempi e degli spazi dell'apprendimento per i futuri maestri, con le indicazioni degli orari, dei regolamenti, l'organizzazione interna, la distribuzione delle materie, ricadenti nella possibilità di affondare lo sguardo nella cultura scolastica prodotta dal singolo istituto locale: sono questi alcuni tra i più sensibili apporti conoscitivi che l'indagine della Miceli ha con il suo lavoro proficuamente assicurato, per uno spaccato originale della storia meridionale dell'istruzione.

*Michela D'Alessio*

**Gianfranco Tortorelli, *Storia di un tipografo-editore. La Galeati dal 1824 al secondo dopoguerra*, Bologna, Pendagrone, 2015, 271 pp.**

Le ricerche e le iniziative di Gianfranco Tortorelli hanno contribuito, com'è noto, all'ampio rinnovamento degli studi di storia dell'editoria avvenuto in Italia nel recente passato, riuscendo a far dialogare lo sviluppo dell'editoria nazionale con le peculiarità geografiche. Il suo ultimo lavoro, dedicato al rilevante tipografo-editore Galeati di Imola, riesce a ricomporre, in una visione d'insieme, fasi e passaggi cruciali della storia culturale italiana, inserendo le vicende della Galeati all'interno di un quadro storico e politico nazionale ricco di eventi spesso sospesi tra evoluzione e involuzione. Per ricomporre l'ampia e diversificata attività della Galeati, dagli esordi nell'epoca della Restaurazione sino

secondo dopoguerra, Tortorelli si avvale di una narrazione storica incentrata su precisi nuclei tematici, mettendo in risalto progetti ed iniziative che restituiscono al contempo l'importanza storica e la modernità dell'impresa imolese. Delineando l'esordio della società ad opera del fondatore Ignazio Galeati, l'autore ricostruisce puntualmente le collaborazioni con la Società dei Calobibliofili, instaurate sulla scorta di un preciso programma editoriale mirante a contrastare la modernità laica e materialista nel clima politico seguito alla Restaurazione, con un approfondimento del catalogo che getta luce sulla complessa vicenda culturale del periodo.

Nello sviluppo cronologico degli eventi, Tortorelli si sofferma sulla necessaria delucidazione dell'impegno civile di Paolo Galeati, che successe al padre Ignazio: formatosi professionalmente presso Felice Le Monnier e culturalmente negli ambienti del liberalismo moderato fiorentino, fu un appassionato cultore e strenuo difensore della tradizione tipografica italiana impersonata da Giovan Battista Bodoni tanto da contrapporsi alla politica modernizzatrice condivisa dagli editori Le Monnier, Barbèra, Treves e Zanichelli. L'analisi condotta sulla produzione tipografica, diretta da Paolo Galeati, ne rivela la capacità di saper radicare profondi sodalizi col territorio guadagnandosi presto consenso e rispetto presso intellettuali e istituzioni, come nel caso del rapporto tra l'editore e i più autorevoli poeti della Scuola Romana: un connubio solido e duraturo, ruotante intorno ad una proposta culturale che si imporrà all'attenzione nazionale. Tra gli interessi della Galeati spicca l'attenzione riservata al mondo della scuola, con un ampio catalogo che contempla libri di testo, riflessioni dei protagonisti e regolari pubblicazioni su enti ed istituti educativi mettendo insieme un ricco materiale complesso e articolato, indispensabile per la

ricostruzione storica dei processi formativi in ambito locale.

L'interesse della Galeati per l'intera area della cultura è attestato, inoltre, dalla produzione relativa alla musica e al teatro, costituenti un utile polo per affrontare, mediante la rilettura del catalogo offerto da Tortorelli, la questione delle funzioni assolute da queste arti, soprattutto, a partire dalla seconda metà dell'Ottocento.

Di valore più diffusamente sociale risulta la copiosa abbondanza di lavori nel campo delle opere pie, dei ricoveri e dell'ospedale psichiatrico di Imola, testimonianza diretta e concreta di quanta importanza assunse, presso il notabilato locale, la partecipazione laica alla vita sociale. Negli ultimi anni dell'Ottocento, mutata la situazione politica e di fronte ad un considerevole calo della produzione dovuta ad una contrazione del mercato locale, Paolo Galeati dovette correre ai ripari aderendo, nel 1900, alla costituzione di una società cooperativa, a lui intitolata dopo la morte avvenuta nel 1903. Con la nascita della Cooperativa Tipografica Editrice Galeati si avviò la più prestigiosa committenza: la pubblicazione dell'Edizione nazionale delle scritti di Giuseppe Mazzini, descritta dall'autore come una autentica missione.

Iniziata nel 1905, la pubblicazione delle Opere fu portata a termine solo nel 1943, e rappresentò uno dei momenti più significativi e travagliati della storia della tipografia imolese, ricostruita *ex novo* dall'autore in tutti i suoi complessi aspetti. Le riviste e i giornali editi dalla Galeati sono stati un tramite importante tra la realtà locale e quella nazionale, soprattutto nel campo della stampa politica. Per tutto l'Ottocento e sino all'avvento del Fascismo, la Galeati ha datato ampio spazio alle pubblicazioni delle compagini politiche, sostenendo di fatto, nella seconda metà dell'Ottocento, la difficile dialettica

tra le forze socialiste e cattoliche presenti sul territorio imolese, che vedevano nella stampa lo strumento più idoneo a promuovere il rispettivo radicamento territoriale. La storia della Galeati ricostruita da Tortorelli fa riemergere, infine, il contributo importante dei tanti intellettuali e politici che hanno accompagnato la vita della tipografia editrice Galeati, e al contempo ci consegna, mediante la ricostruzione tematica del catalogo e l'analisi ad esso dedicato, una fonte preziosissima per ulteriori indagini storiche di un'area geografica periferica che assurge a cassa di risonanza, di aspettative e contributi di ampio respiro nazionale.

*Florindo Palladino*

**Hervé A. Cavallera (a cura di), *La ricerca storico-educativa oggi. Un confronto di metodi, modelli e programmi di ricerca*, Lecce-Brescia, Pensa MultiMedia, 2013, I Tomo, 496 pp.; II Tomo, 656 pp.**

La storia della pedagogia e dell'educazione e le ricerche ad esse collegate hanno avuto negli ultimi anni un notevole incremento. La comunità scientifica italiana degli studiosi di questo settore si è ritrovata l'8 e il 9 novembre 2012 a Lecce, presso l'Università del Salento, in occasione del Convegno Internazionale di Studi, promosso dal Centro per la Ricerca Storico-Educativa (CIRSE), che ha avuto come titolo *La ricerca storico-educativa oggi. Un confronto di metodi, modelli e programmi di ricerca*. Gli atti del Convegno appaiono in un volume, in due tomi, curato da Hervé Antonio Cavallera.

La disciplina storico educativa negli ultimi decenni si è profondamente modificata dal punto di vista epistemologico e questo cambiamento ha portato anche ad un rinnovamento metodologico che ha

trovato riscontro nei programmi di ricerca realizzati e *in fieri*. La ricerca storico-educativa oggi, affrancatasi ormai dal modello neoidealista imperante nella prima metà del Novecento, si sta sviluppando secondo programmi e metodi differenti tra loro, che però hanno in comune la volontà di promuovere itinerari ancora poco conosciuti e di contribuire anche a dare profondità al complesso concetto di educazione. Infatti anche se negli ultimi decenni si è assistito alla progressiva emarginazione del sapere storico-educativo dai processi di formazione e aggiornamento del personale docente e educativo, la notevole crescita delle ricerche, sia quantitativa che qualitativa, ha posto in evidenza un indiscutibile rinnovamento storiografico del settore che, senza negare l'importanza delle teorie, sembra oggi scandagliare la realtà educativa da molti punti di vista, come quello sociale, economico, politico e culturale. In questa prospettiva trovano posto molte "storie", molti filoni di studio che rivestono tutti pari dignità scientifica.

La ricerca si muove tra acquisizioni consolidate e prospettive aperte a vari sviluppi (Giuseppe Trebisacce), in un pluralismo di frontiere ricco di complessità (Franco Cambi) che non tralascia la dimensione soggettiva (Bruno Bellerate) e deve misurarsi con la crisi del concetto stesso di educazione in una società sempre più dominata dalla scienza e dalla tecnica, le quali hanno posto in discussione il concetto stesso di progresso e, conseguentemente, anche quello di scuola (Hervé A. Cavallera).

Nei volumi in questione tutto ciò ha trovato una sistemazione organica in cinque sezioni parallele – che corrispondono alle diverse angolazioni dalle quali può essere guardata e condotta la ricerca storico-educativa –, denominate rispettivamente *Le idee e la loro manifestazione*, *Storia delle istituzioni educative e modelli dell'e-*

*ducativo, Storia sociale dell'educazione e ruolo dell'immaginario, La letteratura per l'infanzia e le grammatiche della fantasia, L'educazione comparata e la complessità dei percorsi.*

Nella prima sezione i contributi, pur facendo riferimento alla storia delle idee, il più tradizionale campo di indagine storica in educazione, dimostrano come oggi le ricerche siano condotte secondo nuovi paradigmi, più complessi e variegati rispetto al passato. Gli studiosi infatti pongono in luce il valore dell'analisi storico-educativa rivolta a delineare modelli teorici, come quelli dell'educazione femminile ed infantile, o interessata ad approfondire il pensiero di specifici autori, o ancora rimandano a studi storiografici e offrono uno spaccato puntuale circa l'interpretazione data nel tempo al pensiero di importanti pedagogisti come Rosmini, Gramsci, Adler o Rousseau. In questi saggi emerge l'identità epistemologica del sapere pedagogico, non riducibile alla dimensione didattico-operativa, che trova invece nella conoscenza storica un metodo per comprendere e affrontare le problematiche: essa induce infatti a porsi domande e, non esaurendosi nell'apprendimento di teorie o di pratiche del passato, sfocia nella «scienza degli uomini nel tempo» indicata da Bloch.

Anche nella seconda sezione, *Storia delle istituzioni educative e modelli dell'educativo*, alcuni saggi pongono l'accento sul rinnovamento metodologico che ha portato ad un nuovo concetto di storia della scuola e all'apertura di centri di ricerca e Musei dell'educazione come luoghi di catalogazione di beni culturali e conservazione della memoria, ma anche di studio di materiali precedentemente trascurati come fonti storiche. È il reperimento di queste fonti infatti che pone nuove sfide metodologiche e diverse soluzioni interpretative permettendo anche una aggiornata

riflessione sulle dinamiche tra storia locale e storia nazionale: se la prima infatti consente di andare in profondità nelle realtà locali e dar conto delle specificità che sfuggono ad un approccio più ampio, la seconda ricostruisce un quadro nazionale che concorre a darle senso. Altri saggi sono esempi di studi specifici su periodi particolari, oppure relativi ad una peculiare forma di educazione – professionale, secondaria classica, universitaria –, o ancora ad esperienze educative significative come la Città dei Ragazzi di Roma. Molti altri contributi pongono l'attenzione sulla figura del maestro e del professore, sull'associazionismo magistrale, sulle Università, sugli istituti di correzione e i Seminari. La storia delle istituzioni educative si presta anche all'uso di nuove tecnologie come gli archivi digitali che, oltre ad essere uno strumento di lavoro prezioso per gli storici dell'educazione, sono utilizzabili nella didattica blended con ottimi risultati.

Da questa sezione emergono quindi, con particolare evidenza, una ricerca storica rinnovata nell'oggetto e nei metodi, e una vitalità della disciplina che si concretizzano nei numerosi progetti di studio illustrati anche da giovani ricercatori.

Nel secondo tomo, la sezione *Storia sociale dell'educazione e ruolo dell'immaginario* indaga una delle frontiere della storia dell'educazione che ha avuto in tempi recenti un forte impulso sia riguardo all'educazione femminile ed a ruoli poco conosciuti come quello della madre infanticida, sia ai modelli educativi sentimentali, e la colloca anche in contesti specifici come l'Impero Romano d'Oriente. Anche in questa sezione risulta evidente la novità nelle fonti esaminate: l'influenza dell'iconografia e delle emozioni sulla costruzione dei ruoli di genere, gli epistolari, i galatei e le fonti figurative sono esempi di fine euristica ed ermeneutica che contribuiscono in maniera rilevante al rinnovo

vamento epistemologico della disciplina e possono aprirla anche alla dimensione internazionale secondo una trasformazione ormai già in atto.

*La letteratura per l'infanzia e le grammatiche della fantasia* è la sezione dedicata al «raccontare storie» attraverso libri d'arte, autori e libri classici – come Gianni Rodari e Pinocchio o i volumi di Elsa Morante – e nuovi generi – come il Fantasy –, o le fiabe, prese in considerazione anche in prospettiva internazionale. La letteratura per l'infanzia può essere un osservatorio privilegiato per entrare nelle pieghe più segrete del mondo dell'infanzia e per studiare l'immaginario. Va sottolineato anche che in questo settore troviamo la presenza di scritture diaristiche che rimandano a possibili percorsi di autoformazione, ma anche a nuove forme di condizionamento del lettore. La letteratura può diventare allora uno strumento di indagine nel mondo dell'infanzia dotato di chiavi di lettura nuove, di materiale simbolico e di metafore che permettono di indagare i modelli formativi dei bambini e delle bambine, ed anche di scoprire il punto di vista dell'infanzia.

L'ultima sezione è dedicata a *L'educazione comparata e la complessità dei percorsi*: è questo un settore della storia dell'educazione che da sempre appare parte integrante della disciplina, anche se ha avuto in Italia una diffusione abbastanza circoscritta. Essa però sembra destinata ad essere incrementata anche grazie alle sollecitazioni provenienti dal fenomeno della globalizzazione che pone interrogativi importanti all'educazione e la proietta in un futuro da costruire, in un'utopia educativa da realizzare, in un ideale pedagogico che deve concretizzarsi attraverso politiche condivise ed eque.

La comparazione allora si applica a diversi campi dell'educazione e i saggi proposti lo dimostrano: si possono com-

parare modelli pedagogici relativi all'idea di bambino, o azioni educative tese a rendere l'uomo cittadino consapevole, o ancora concezioni relative ad un particolare concetto pedagogico come quello di competenza. Come sottolineato nel testo, una particolare attenzione va data nei percorsi di ricerca alle pratiche e ai modelli educativi di Paesi che sottendono storie e antropologie differenti: gli studi comparativi possono, dal punto di vista pedagogico, cogliere nelle differenti culture le matrici umane di sviluppo e le forze motrici sociali, riuscendo a conoscere in questo modo l'uomo e il bambino nelle differenti culture e a configurarsi così come scoperta di alterità antropologica che indaga il concetto di educazione, lo arricchisce, lo mostra in tutta la sua complessità di forme e di manifestazioni, lo coglie come problematico e polimorfo.

Gli interventi della Tavola rotonda hanno posto in evidenza l'estrema dinamicità della ricerca storico-educativa attraverso riflessioni che hanno preso in considerazione i manuali scolastici, le fonti orali, il rinnovamento lessicale, metodologico e contenutistico degli studi attuali, il riesame del dibattito epistemologico e metodologico sviluppatosi in Italia a partire dal 1968, l'educazione sentimentale nella storia della vita privata, e le possibili direzioni che la storia della pedagogia potrà prendere nell'immediato futuro.

Il volume curato da Cavallera rappresenta una delle pubblicazioni più significative degli ultimi anni relative alla ricerca storico-educativa: raccogliendo la riflessione della maggior parte degli storici dell'educazione, è in grado di restituire l'importanza, la vivacità e la varietà degli itinerari di ricerca progettati ed attuati e di indicarne altri di nuovi che nascono dalla consapevolezza del cambiamento epistemologico e metodologico che sta attraversando la disciplina.

In alcuni contributi inoltre emerge anche il valore formativo di questo settore di studi particolarmente importante in un momento storico nel quale la riduzione della preparazione di insegnanti e educatori alla dimensione metodologico-prassica rischia di riproporre finalità prettamente utilitaristiche. Sembra allora prioritario ridare ai professionisti dell'educazione una formazione storico-critica che faccia luce sull'epistemologia del sapere pedagogico e lo riconnetta agli altri campi del sapere mantenendo ferma la propria identità disciplinare. La conoscenza storica, così come delineata in questi due volumi, si rivela essere soprattutto un metodo per affrontare le questioni pedagogiche, indagarle in profondità per superarle e pervenire a nuove ed attuali soluzioni.

*Carla Callegari*



*Scientific News  
and Activities  
of Research Centres*



Cronache scientifiche  
e Attività  
degli istituti di ricerca



# Discurso leído en la investidura como Doctor Honoris Causa por la Universidad de Lisboa (Lisboa, 23 de Abril de 2015)

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*Speech read at the investiture as Doctor Honoris Causa by the University of Lisbon (Lisbon, April 23, 2015)*

**ABSTRACT:** This paper reproduces the speech read by prof. Agustín Escolano Benito on the occasion of the conferment of the laurea honoris causa from the University of Lisbon. University professor, man of science, humanist, Escolano, founder and director of the CEINCE (Centro Internacional de la Cultura Escolar), today is one of the major figures in the History of Education in Spain and in Europe.

**EET/TEE KEYWORDS:** History of Education; Cultura Escolar; Laurea Honoris Causa; Agustín Escolano Benito; Spain; XX-XXI<sup>th</sup> Centuries.

*Tras la nominación por el Senado de la Universidad de Lisboa, el 23 de abril, coincidiendo con el Día Internacional del Libro, del pasado 2015 se celebró en la Universidad de Lisboa la solemne investidura de Doctor Honoris Causa concedido al profesor Agustín Escolano Benito, catedrático de la Universidad de Valladolid. La universidad lusófona hizo así un reconocimiento al profesor, pedagogo, historiador de la educación y prolífico autor de obras científicas por sus méritos académicos, intelectuales y científicos en el campo de la educación, y por la amplia influencia que el profesor ha tenido en Portugal desde el Centro Internacional de la Cultura Escolar (CEINCE) que dirige. La majestuosa entrada de la Universidad de Lisboa acogió a numerosas personas trajeadas provenientes de diversas universidades de España y Portugal entre los que se encontraba Eduardo Junco, embajador de España en Lisboa y la esposa del Presidente de la República, Maria Alves da Silva Cavaco Silva. Resultó elegante y significativa la entrega de un clavel a cada miembro de público, en homenaje a la Revolución de los Claveles del 24 de abril de 1974, llenando de colorido la amplia Aula Magna del Rectorado de la Universidad. El cortejo estaba compuesto por profesores*

*de diferentes universidades y los trajes variaban de unos a otros mostrando y uniendo la diversidad de vestimenta representativa del mundo académico. La entrada de los profesores frente al público mientras sonaba el himno universitario Gaudeamus igitur abrió el acto y llenó de solemnidad el Aula. La escenificación de la entrega del Doctor Honoris Causa fue singular y emotiva. Reunidos se encontraban el profesor Justino Pereira de Magalhães, padrino del profesor Escolano, el profesor João Pedro Mendes da Ponte, director del Instituto de Educación, el profesor António Manuel da Cruz Serra, Rector de la Universidad de Lisboa y el profesor António Sampaio da Nóvoa, ex rector de la Universidad de Lisboa.*

*La ceremonia fue doble pues también se investía al maestro Sérgio Niza, relevante pedagogo portugués desde la década de los 60 del siglo pasado, quien inspirado en Freinet creó el Movimiento de la Escuela Moderna en Portugal; «un hombre de diálogo» en palabras de su padrino, el profesor António Sampaio da Nóvoa. Junto al profesor Niza se doctoraba un «humanista e homem de contemplação», en palabras del profesor Justino Magalhães en su laudatio. El elogio del padrino del profesor Escolano abarcó su amplio corpus de publicaciones, su vocación pedagógica y su dimensión e influencia internacional. El profesor Escolano comenzó su discurso en portugués como evidente gesto de acercamiento a su lengua y de agradecimiento, explicando que interpretaba los honores «en clave de comunidad» y «desde el espíritu de convivencia» de ambos países ibéricos. Ciertamente, sus palabras eran coherentes con la presencia de españoles y portugueses en el público y con el trabajo colaborativo entre historiadores de la educación de los dos países. Rememorando a Miguel de Unamuno, Rafael María de Labra, Félix Lorenzo y Luis Bello, sacó a la luz grandes personalidades influidas por la belleza paisajística, la cultura y la aportación intelectual portuguesas. A continuación le fue entregado su Título de Doctor Honoris Causa por la Universidad de Lisboa con sello en oro y la medalla de la Universidad.*

(Kira Mahamud Angulo – UNED Madrid, Spain)



Excelentísimo y Magnífico Señor Rector.  
Excelentísimo Señor Embajador de  
España en Lisboa.

Miembros del Senado universitario, profesores, estudiantes, queridos colegas y amigos de Portugal, familiares, amigas y amigos de España que habéis querido acompañarme en este acto de investidura como doctor *honoris causa* por la Universidad de Lisboa, un hecho de los más importantes que me han acaecido en mi vida personal y académica.

Más allá de lo personal, quiero interpretar que la distinción que hoy se me otorga *ad hominem* ha de entenderse sobre todo en clave de comunidad. Hace ya varias décadas que los investigadores portugueses y españoles del campo de la historia de la educación convivimos abiertos a una comunicación fluida entre pares, tras otros tiempos en los que, pese a la proximidad geográfica, el distanciamiento era sin duda mayor. Y es desde el espíritu de convivencia desde donde quiero interpretar este generoso gesto de amistad.

Desearía, en primer lugar, expresar mi más sincera gratitud por el alto honor que me confiere el prestigioso ateneo de la capital portuguesa. Me llena de satisfacción que el Senado de la Universidad de Lisboa haya considerado mi trabajo intelectual merecedor de tan alta condecoración. Lisboa es en nuestro sector uno de los polos de referencia internacional y ello atribuye un valor añadido a este hecho. Todo ello me invita además a afirmar el compromiso de

seguir reforzando los lazos de amistad y cooperación con esta casa, y de modo especial con su Instituto de Educación.

Agradezco vivamente al profesor Justino Magalhães la amable *laudatio* con que acaba de presentarme. Con él me unen viejos lazos de amistad e intereses comunes en torno al estudio histórico de la cultura escolar, de la manualística, de la historia de la lectura y de otros aspectos que afectan al patrimonio de la educación.

Me permitirán ahora que continúe mi intervención sirviéndome de mi propia lengua, el castellano, invitándoles, como hizo el recordado cineasta Manoel de Oliveira, a que podamos entendernos – hoy Día Internacional del Libro, y siempre – en la lengua de Luis de Camões y en la lengua de Miguel de Cervantes.

Puedo asegurarles, sin retórica, que esta incorporación al colegio de doctores de la Universidad de Lisboa será para mí una nueva ocasión de aprendizaje. No sólo porque con la edad aún se sigue aprendiendo cada día, como observó Marco Tulio Cicerón, sino porque Lisboa, y Portugal en general, me han asegurado siempre oportunidades nuevas de formación.

Hace poco escuchaba decir al académico español Antonio Muñoz Molina (el autor de *Invierno en Lisboa*) que los viajes a Portugal siempre le habían educado. Me han mostrado – decía – la otra cara que suelen tener las cosas, cuando en la fenomenología del cotidiano y en el entorno más próximo sólo se ven planas y simples.

Internarse en Portugal es abrir una nueva ventana a la experiencia, a través de la cual las cosas que vemos y oímos se nos presentan con otros horizontes que sugieren un sutil juego de entendimiento en lo común y de enriquecimiento en la diferencia. Pasear y conversar, como he podido hacer en los últimos años, en compañía de colegas y alumnos, por los jardines de la Gulbenkian, entre los Jerónimos y Belém, a través de los cafés de Chiado y de las librerías de la Lisboa antigua, o acercarme a los alrededores de la ciudad por Sintra, Mafra, Cascais y toda la corona de lugares que enmarcan la capital, con la luz y la mirada atlántica al fondo, es una experiencia que siempre me ha suscitado emoción y conocimiento.

Todo ello me trae inevitablemente a la memoria al Miguel de Unamuno de los *Viajes por tierras de Portugal y España*. El viejo rector de Salamanca admiraba, hace un siglo, la fresca lírica del regeneracionista João de Deus – con cuya *Cartilha Maternal* aprendieron a leer tantas generaciones de infantes – y los registros populares de la literatura vernácula del país.

También me hace recordar a Rafael María de Labra, rector de la Institución Libre de Enseñanza, quien, en sus conferencias de Lisboa a finales del siglo XIX, subrayaba el alto valor acrisolado por la civilización portuguesa, resultado del cruce entre las tradiciones propias y las seculares influencias recibidas a través de los contactos de sus gentes por el mundo.

De este *humus*, en parte paralelo, y en parte común a toda Iberia, no nos separaban los pliegues del terreno, porque el *cursus* de los ríos ha sugerido

una fluida y continua invitación a la concordia. El cronista Félix Lorenzo, corresponsal en Lisboa del diario *El Imparcial*, confesaba el estímulo que para él supuso la explosión romántica e intelectual de la República portuguesa de 1910, que le permitía albergar esperanzas para aquella España que acababa de sacrificar los escasos brotes de libertad con el fusilamiento en la Barcelona de la época del educador Francisco Ferrer i Guardia.

Años después, en 1925, a su paso por la vecina Extremadura, otro periodista, Luis Bello – autor de *Viaje por las escuelas de España* –, dejó reflejadas en su bitácora incursiones en tierras portuguesas, por Portalegre, São Lourenço, Crato, Alpalhao y otros lugares transfronterizos, cuando la República democrática iba a cerrar su andadura. El tono de sus observaciones tenía notas afines a los regeneracionismos de la época, pero también registraba la visión caleidoscópica, cubista, con la que el cronista del diario *El Sol* sugería mirar la rica diversidad de las sociedades y culturas ibéricas.

En el artículo intitulado *A los camaradas portugueses*, Luis Bello recordaba con admiración los programas de reforma de Antonio Sérgio y los asociaba a los intentos españoles auspiciados por la Institución Libre de Enseñanza y sus intelectuales. Antonio Sérgio – figura a la que nuestro querido y recordado amigo, y maestro, el profesor Rogério Fernandes dedicó cuidadosos y sentidos estudios – quiso ensayar la superación del dualismo social por medio de la escuela del trabajo. Él fue el intelectual quizá más capacitado de la época – escribía Bello – para afrontar la regeneración de la nación por medio de una escuela para todos.

Nuestros pueblos, distantes a veces aún en la cercanía, han conocido y vivido realidades parejas. El poeta catalán Joan Maragall proponía a Miguel de Unamuno construir una cívica y culta hermandad de pueblos ibéricos, más allá de sus regímenes políticos. Una hermandad que pudiera sentar en la misma mesa a Jacinto Verdaguer, Rosalía de Castro, João de Deus e incluso al modernista Rubén Darío. Con ellos se tejería una gran coral de voces diferentes que pudiera propiciar una armonía superior, como sugirió el que fuera primer catedrático español de Historia de la Educación, Luis de Zulueta y Escolano, en su *Elogio de la diversidad y Banquete de la armonía*.

Tras la era de la regeneración, que se cierra con las repúblicas democráticas, nuestros países han atravesado una larga etapa de postración, un prolongado «tiempo de silencio» (como lo definió el escritor español Luis Martín Santos). También un tiempo de resistencia. Durante las inacabables dictaduras, cohabitamos en un territorio por el que cruzaban los mismos ríos, pero las montañas – como observó José Saramago – volvían a mostrar sus dos laderas, una hacia el Este y otra hacia el Oeste.

La revolución y la transición democrática – en parte sincrónicas, aunque también diferentes –, por un lado, y la integración de ambos países en el espacio común de Europa, por otro, nos han aproximado en una decidida apertura a la Modernidad (este fue el tema del II Encuentro Ibérico de Historia de

la Educación, un coloquio que trató de hacer genealogía crítica, y en parte catártica, de nuestra reciente historia, desde el ciclo del liberalismo a la antesala del tiempo presente). Tras el primer encuentro en San Pedro do Sul, en 1992, las sucesivas citas de Zamora, Braga, Allariz-Ourense, Castelo Branco, Sevilla y Porto-Paredes fundaron la posibilidad de una historia compartida de la educación ibérica, y hasta de una historia ibérica de la educación, como manifestaban los profesores Nóvoa y Ruiz Berrio en el prólogo a las actas del primer coloquio.

Para eludir cualquier anacrónica tentación de interpretar lo anterior desde el viejo iberismo, que hoy se nos mostraría arcaizante, las actas del II Encuentro enfatizaron la necesidad de enmarcar nuestros programas en la más abierta geografía de la globalización, bajo la perspectiva de una historia comparada de nuestros sistemas educativos, contextualizada en el marco de lo transnacional, y relacionada especialmente con la historia educativa de los países de lengua portuguesa y castellana.

Los encuentros ibéricos han dibujado una cartografía de lugares de uno y otro lado de la raya y de norte a sur, imagen de las expectativas interculturales y transfronterizas que podían aproximar a nuestras respectivas comunidades intelectuales. Las fronteras dejaron de ser líneas fijas de demarcación para transformarse, como sugirió hace tiempo Josep Pla, en ventanas de una aproximación porosa y necesaria.

El nuevo horizonte, desde la recuperación crítica de la memoria, ha tenido que superar viejos arcaísmos y emprender el camino de una nueva cultura. La generación de historiadores de la educación a la que pertenezco ha ido conformando en esta nueva etapa redes interpersonales e institucionales entre los investigadores de los dos países, al tiempo que ha dado forma, junto a los colegas de otros medios internacionales – en la ISCHE (*Internacional Standing Conference for the History of Education*), en SPICAE (*Red de Historiadores de la Escuela en la Europa del Sur*) y en otros foros de Europa e Iberoamérica –, a discursos, métodos y lenguajes con los que entretejer un campo intelectual renovado.

Este es el breve excursus histórico en el que hemos de instalarnos como tradición disponible para seguir avanzando a la altura de nuestro tiempo, una expresión esta – la «altura de los tiempos» – que lanzó a la arena intelectual el filósofo José Ortega y Gasset, quien también escogió la ciudad de Lisboa como residencia desde la que ir asomándose, con prudencia y calculado tacto, a la autárquica y autoritaria España de posguerra. Quiero quedarme cerca de la frontera porque pienso volver – decía al salir de Lisboa –. Quienes vivimos en España, hace pocas décadas, la transición democrática – en otro contexto – también mirábamos, con admiración y esperanza, la estela que dejó en nosotros el aroma de los claveles atlánticos.

Me viene ahora a la memoria el emotivo acto conmemorativo del centenario de la era moderna de la Universidad de Lisboa, al que fui invitado por el



entonces Rector, profesor Antonio Sampaio da Novoa. Conservo el discurso del expresidente Antonio Ramalho Eanes, investido en aquella ocasión doctor *honoris causa*, junto a los otros expresidentes de la República. En el texto subrayé la referencia que hizo a la expresión de Bernardino Machado, amigo de Alice Pestana y de Giner de los Ríos, quien afirmaba el papel de la universidad como universo de libertad, esto es, como espacio de libre discusión de lo público. «A universidade – decía – debe ser escola de tudo, mas sobretudo de liberdade». El saber es tal vez el único espacio de libertad del ser, escribiría mucho después Michel Foucault en una de sus últimas confesiones ontológicas. También en la ilusión de libertad la libertad existe, había declarado antes Fernando Pessoa, como lema en el que poder fundar una terapia de sus desasosiegos.

Nuestra época, con sus crisis, ha traído muchas y nuevas inquietudes y turbaciones. Los historiadores de cada generación han de interrogar al pasado desde las preguntas que suscita el presente para afrontar el porvenir. «No está el mañana ni el ayer escrito», escribió Antonio Machado, el poeta sevillano y universal que tanto contribuyó a recrear la tierra en la que nació y donde inicié mi formación. Décadas después, el argentino Cortázar, en sus rayuelas lúdicas, vendría a puntualizar: la historia no ha de olvidar, en ningún caso, que «el ayer es nunca, y el mañana, mañana». El viejo historiador Henri Pirenne, en su *Histoire de l'Europe*, ya lo había advertido: los historiadores nos dedicamos al conocimiento del pasado, sí, pero – no nos engañemos – lo que de verdad nos interesa es el futuro.

Nacemos – escribió el poeta Rainer Maria Rilke – en un mundo ya interpretado, pero estamos obligados a descifrarlo y a reescribirlo. Los historiadores somos probablemente los académicos sobre los que más pesa lo que algunos han llamado la «condena hermenéutica». El Centro Internacional de la Cultura Escolar (CEINCE), donde ocupo la mayor parte de mis afanes y tiempos, adoptó como símbolo el laberinto de la casa de Lucrecio – el filósofo materialista del siglo I a.C. – en Pompeya. En el intricado dédalo de esta red se albergaría Minotauro, fuente de las amenazas que nos acechan en el vivir cotidiano. El monstruo acosaría por los vericuetos de sus calles al joven Teseo, mientras este buscaría el hilo tutorial de Ariadna, la educadora que le salvará del desasosiego. Los profesores, después de tantas reformas educativas externalistas insatisfactorias – gerenciales o tecnocráticas –, han retornado, como advirtió el profesor Novoa en su magistral conferencia de Burgo de Osma, en 2011, al primer plano de las prácticas innovadoras, al igual que Ariadna vuelve cuando se la solicita. Los mitos son en verdad creaciones de un tiempo, pero duran y sufren sucesivas metamorfosis para readaptarse a las expectativas de cada época, también de la actual.

En pleno desarrollo de la civilización tecnológica que domina nuestro tiempo conviene escuchar las confesiones de uno de sus más reconocidos mentores. Steve Jobs, el mítico referente de la era digital, expresó antes de su desaparición una de las convicciones que inspiraron su sorprendente y confeso *ethos* de

humanista: «Cambiaría toda mi tecnología – decía – por una tarde entera con Sócrates». Este testimonio comportaba una profunda lección de sabiduría, la que reivindicaba el valor del silencio y de la palabra – los verdaderos poderes socráticos del maestro – que han de intervenir en la búsqueda de sentido de la nueva escritura del mundo. Nuestro tiempo tiene también que prestar atención al silencio de las cosas, cómplice de otros silencios de la cultura. Y otra vez Fernando Pessoa – no podía ser de otro modo estando en Lisboa – nos puede confortar: no hallo más reposo – decía – que en la lectura de los clásicos, que no distinguen los ocasos, pero los hacen inteligibles.

Los historiadores de la educación buceamos hoy en los silencios, en las palabras, y en las cosas, sospechosos de que los discursos de las ideas y de las normas no explican bien la gramática de la tradición ni el *habitus* de los enseñantes. Indagamos en esa cultura de la práctica de la que habló Zigmunt Bauman, en las saludables razones de la experiencia a las que Pierre Bourdieu aconsejaba retornar siempre, y sobre todo en tiempos de incertidumbre.

Estamos empezando a construir una nueva cultura histórica, que trata de ser menos idealista y, en lo posible, menos ideológica. Intentamos descubrir bajo el retorno realista a la experiencia, e incluso a los restos etnográficos de la cultura material, las claves semióticas y arqueológicas de la gramática de la escolarización y de las reglas del oficio docente, que mucho tienen que ver con el tacto y la *phrónesis* que ha transmitido la historia efectual de la que habló Hans-Georg Gadamer.

Este regreso al mundo de la *empeiria* comporta seguramente un cambio de paradigma, como me hacía observar, en una de sus últimas cartas, quien fuera mi primera maestra en la disciplina, en la Universidad Complutense, la profesora Ángeles Galino, a quien dedico en este acto mi filial recuerdo. Ella que se había formado, hace un siglo, en la lectura de Dilthey y de los neokantianos veía, a su centenaria edad, que este giro pragmático y epistémico fundaba un nuevo horizonte prometedor para afirmar el valor de la historia de la educación en el concierto académico y en las disputas entre facultades y disciplinas.

Señor Rector, queridos colegas, amigas y amigos de Portugal y de España. En mis palabras finales quiero reiterar mi más sentido agradecimiento por el honor que recibo en este acto al ser investido doctor *honoris causa* por la prestigiosa Universidad de Lisboa, y por sumarme al acreditado cuadro de profesores de este *Studium*. Espero que el tiempo – que siempre es un misterio inescrutable e imprevisible y una concesión de la naturaleza, como declaraba a su proveya edad Manoel de Oliveira, en la antesala de su muerte – nos depare oportunidades de profundizar en el saber y en la amistad, los valores que a todos nos unen, ahora reforzados con lazos de más sólida y sincera hermandad.

Muchas gracias.

# Il Simposio internazionale su «La Memoria Escolar. Nuevas tendencias en la investigación histórico-educativa: perspectivas heurísticas y cuestiones metodológicas» (Siviglia, 22-23 settembre 2015)

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*International Symposium about «School Memories. New Trends in Historical Research into Education: Heuristic Perspectives and Methodological Issues» (Seville, 22-23 September 2015)*

ABSTRACT: Report of the International Symposium «School Memories. New Trends in Historical Research into Education: Heuristic Perspectives and Methodological Issues» (Seville, 22-23 September 2015), organised by the University of Seville, in collaboration with the Centre for documentation and research on the history of schoolbooks and children's literature (CESCO) of the University of Macerata, the Centre of Studies for Educational Memory (CEME) of the University of Murcia and the International Centre of School Culture (CEINCE). The report presents synthetically the communications submitted to the sessions «Individual Memory», «Collective Memory» and «Policies and Places of Memory», commenting them critically and highlighting some research trends in the history of education on an international level.

EET/TEE KEYWORDS: History of Education; School Memories; Cultural Memory; Oral History; XIX-XX<sup>th</sup> Centuries.

Il 22 e 23 settembre 2015 si è svolto a Sevilla (Spain) il Simposio internazionale *La memoria escolar. Nuevas tendencias en la investigación histórico-educativa: perspectivas heurísticas y cuestiones metodológicas*, organizzato dal «Gruppo di ricerca in Storia dell'insegnamento» della Universidad de Sevilla (Spain), in collaborazione con il «Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia» dell'Università degli Studi di Macerata (Italy), il «Centro de estudios sobre la memoria educativa» della Universidad de Murcia (Spain), il «Centro internacional de la cultura escolar» di Berlanga de Duero (Spain) e il « Museo Pedagógico de la Facultad de Ciencias de la Educación» de la Universidad de Sevilla (Spain). I presidenti del Comitato di programma del simposio sono stati Cristina Yanes Cabrera (Universidad de Sevilla) e Juri Meda (Università degli Studi di Macerata); il Comitato scientifico internazionale – composto da più di trenta rappresentanti della comunità scientifica internazionale degli storici dell'educazione<sup>1</sup> – è stato presieduto da Agustín Escolano (CEINCE) e Antonio Viñao (Universidad de Murcia); María Nieves Gómez Garcia (Universidad de Sevilla) ha esercitato l'ufficio di presidente onorario dell'assise.

Questo convegno ha costituito il risultato di una *call for papers* internazionale, ampiamente diffusa attraverso i *social media*, le riviste specializzate, le *mailing list* e i siti web delle società scientifiche nazionali di storia dell'educazione. La

<sup>1</sup> María del Carmen Agulló Díaz (Universidad de Valencia), Pablo Álvarez Dominguez (Universidad de Sevilla), Németh Andras (Eötvös Loránd Tudományegyetem, Budapest), Anna Ascenzi (Università degli Studi di Macerata), Ana Badanelli (Universidad Nacional de Educación a Distancia – UNED), Gianfranco Bandini (Università degli Studi di Firenze), Alberto Barausse (Università degli Studi del Molise), Paolo Bianchini (Università degli Studi di Torino), Sjaak Braster (Erasmus Universiteit Rotterdam), Marta Brunelli (Università degli Studi di Macerata), Marcelo Caruso (Humboldt Universität zu Berlin), Héctor Rubén Cucuzza (Universidad de Lujan), Raimundo Cuesta (Federación Icaria), María del Mar del Pozo Andrés (Universidad de Alcalá), Inés Dussel (Facultad Latinoamericana de Ciencias Sociales – FLACSO/Argentina), Eckhardt Fuchs (Georg-Eckert-Institut, Braunschweig), Ian Grosvenor (University of Birmingham), Martin Lawn (University of Oxford), Margarida Louro Felgueiras (Universidade do Porto), Kira Mahamud (Universidad Nacional de Educación a Distancia – UNED), Alejandro Mayordomo Pérez (Universidad de Valencia / SEPHE), Juri Meda (Università degli Studi di Macerata), María Joao Mogarro (Universidade de Lisboa), Pedro Luis Moreno Martínez (Universidad de Murcia), Marina Nuñez Gil (Universidad de Sevilla), Gabriela Ossenbach (Universidad Nacional de Educación a Distancia – UNED) Heloisa Helena Pimenta Rocha (Universidade Estadual de Campinas), Joaquim Pintassilgo (Universidade de Lisboa), Simonetta Polenghi (Università Cattolica del Sacro Cuore di Milano), Karin Priem (Universität Luxemburg), Roberto Sani (Università degli Studi di Macerata), José Miguel Somoza Rodríguez (Universidad Nacional de Educación a Distancia – UNED), Branko Šuštar (Slovenski Šolski Muzej, Ljubljana), Cristina Yanes Cabrera (Universidad de Sevilla).

*call for papers* – aperta dal settembre 2014 – è stata chiusa il 31 dicembre 2014, raccogliendo 186 proposte di comunicazione da tutto il mondo. Dopo un rigoroso processo di selezione, solo 70 proposte sono state accettate: 30 per la sessione «Memoria individuale», 32 per la sessione «Memoria collettiva» e 8 per la sessione «Politiche e luoghi della memoria». Una percentuale di scarto tanto elevata (62%) si è resa necessaria per rispettare il più possibile il programma scientifico descritto nella *call for papers*, al fine di non indebolire eccessivamente i fondamenti epistemologici della riflessione che si intendeva condurre nel corso del simposio stesso.

Se analizziamo la provenienza geografica delle proposte accettate, notiamo che il 56% delle stesse sono giunte da paesi dell'Europa meridionale (Spagna, Italia e Portogallo), il 14% dall'America Latina (Brasile e Messico), il 21% dai Balcani e dall'Europa orientale (Bosnia-Erzegovina, Bulgaria, Croazia, Slovacchia, Slovenia, Grecia, Ungheria, Polonia, Romania, Russia e Serbia), il 6% dalla Francia e solo il 3% da altri paesi. Le comunità scientifiche dell'Europa settentrionale (inglese e tedesca in testa) e l'America settentrionale erano del tutto sottorappresentate.

Questo fenomeno non si spiega con una penalizzazione eccessiva delle suddette comunità scientifiche durante il processo di selezione, in quanto i dati statistici relativi alla provenienza geografica delle proposte respinte confermano ampiamente quelli precedenti (il 40% delle proposte respinte provenivano dai paesi dell'Europa meridionale). Essa può dunque essere spiegata piuttosto con la evidente mancanza d'interesse manifestata dalle comunità scientifiche nordeuropee e nordamericane nei confronti di un filone di studi (la «memoria scolastica») che, al contrario, è diventato di sempre maggiore interessante per gli storici dell'educazione delle aree iberica e latinoamericana negli ultimi quindici anni.

Durante questo periodo di tempo, infatti, in questi paesi, la riflessione storiografica ha fatto proprie le proposte euristiche formulate in alcuni lavori pionieristici da Agustín Escolano, Antonio Viñao e Pierre Caspard, iniziando a dedicarsi allo studio della memoria scolastica e concentrandosi in particolare sulle memorie individuali degli attori della vita scolastica e sugli oggetti della cultura empirica della scuola, dai quali si cercava di ottenere informazioni – non standardizzate in base alla legislazione scolastica e/o alle teorie pedagogiche – sulle pratiche educative realmente svolte in aula, sui rituali scolastici, sulle pratiche disciplinari utilizzate dagli insegnanti, ecc. Paradossalmente, una minore attenzione è stata dedicata alle «politiche scolastiche commemorative», sulle quali si erano particolarmente concentrate le riflessioni di Caspard e Viñao, nonostante esse costituissero quelle che meno richiedevano il ricorso a paradigmi interpretativi alternativi, nonché ad ibridazioni metodologiche.

Un settore sempre più ampio della storia dell'educazione si è mostrato pertanto ricettivo rispetto allo studio della memoria scolastica individuale come risorsa utile per decifrare la «scatola nera della scuola», in quanto – basandosi

su una cultura empirica (esperienza) e materiale (patrimonio) della scuola, piuttosto che teorica (come quella legislativa, curricolare e/o pedagogico) – era in grado di testimoniare quello che era realmente accaduto nelle aule, in particolare relativamente a questioni (quali le punizioni corporali, le pratiche educative «proibite» e altri tabù pedagogici) non documentate nelle cronache ufficiali, anche se storicamente attestate.

Questa tendenza storiografica è stata confermata anche nel corso del simposio. Come già abbiamo notato, infatti, nella sessione «Memoria individuale» (coordinata da Antonio F. Canales Serrano) sono state ammesse trenta comunicazioni, mentre nella sessione «Politiche e luoghi della memoria» (coordinata da Joaquim Pintassilgo) ne sono state ammesse solo otto, a conferma della suddetta polarizzazione storiografica.

I lavori presentati nella sessione «Memoria individuale» si sono concentrati – in particolare – su alcuni tipi di fonti, come le autobiografie e i diari (si segnalano in tal senso i contributi di Nadejda Petrova Aleksandrova, Maja Nikolova, András Németh/Imre Garai, Maria Cristina Morandini, Anna Ascenzi/Elisabetta Patrizi e Kira Mahamud/Ana Badanelli) e le fonti orali (si segnalano in tal senso i contributi di Tom O'Donoghue, Vincze Beatrix, Beata Topij-Stempińska, Annemarie Augschöll Blasbichler, Fabio Targhetta, Alberto Barausse/Rossella Andreassi/Valeria Viola).

Sono risultati inoltre di sicuro interesse le comunicazioni relative all'inchiesta promossa nel 1947-1948 dall'Istituto di Educazione dell'Università di Budapest per analizzare la carriera scolastica di alcune eminenti personalità del tempo, che avevano messo per iscritto in questi formulari statistici i propri ricordi di scuola (Éva Szabolcs/Erzsébet Golnhofer), e all'album dei ricordi brasiliano analizzato da Cleide Maria Maciel de Melo.

Se le fonti presentate nel corso di questa sessione di lavoro sono già abbastanza note agli storici dell'educazione, non si può dire altrettanto di quelle utilizzate dagli studiosi che hanno preso parte alla sessione «Politiche e luoghi della memoria» (coordinata da Joaquim Pintassilgo), i quali sono stati in grado di andare oltre la mera analisi delle politiche commemorative della scuola, individuando nuove fonti utili per definire che tipo di memoria della scuola e della professione docente sia stata promossa nel corso degli anni dalle istituzioni pubbliche, semi-pubbliche o private.

Alcuni relatori si sono concentrati sulle commemorazioni dei funzionari della pubblica istruzione e degli insegnanti benemeriti nelle scritture esposte (Juan Ruiz González), nella onomastica viaria (Aída Terrón Bañuelos) e nella onomastica scolastica (Mirella d'Ascenzo), con la particolarità che il caso bolognese è stato analizzato non attraverso il metodo induttivo, ma in virtù di una ampia ricerca d'archivio che ha permesso di incrociare le deliberazioni del Consiglio Comunale relative alle intitolazioni degli edifici scolastici, i discorsi ufficiali pronunciati dalle autorità nel corso delle inaugurazioni degli edifici e gli apparati scenografici allestiti in queste occasioni. Le cerimonie di inaugurazione

degli edifici scolastici romeni tra il 1864 e il 1914 sono state analizzate anche da Ramona Caramelea.

Altri relatori, invece, si sono concentrati sulle commemorazioni funebri dei maestri e delle maestre, attraverso l'analisi dei necrologi pubblicati sulle riviste educative italiane tra il 1861 e il 1961 (Roberto Sani/Anna Ascenzi) e degli epitaffi incisi sulle lapidi funebri presenti nei cimiteri di alcune piccole città slovene (Branko Šuštar). Sono risultati di grande interesse anche i lavori presentati sulle politiche di assegnazione dei premi al merito da parte del Ministero della Pubblica Istruzione in Italia dall'unificazione nazionale al fascismo (Alberto Barausse/Valeria Miceli) e – parafrasando Pierre Nora – sui «luoghi della memoria scolastica» in Italia, ovvero i musei della scuola, le scuole-musei, le scuole storiche e i *sancta sanctorum* dell'educazione nazionale, come l'edificio romano nel quale Maria Montessori fondò la sua prima *Casa dei Bambini* o la piccola scuola rurale in cui Mario Lodi mise in atto i principi della cooperazione educativa (Juri Meda).

È un peccato, infine, non aver potuto ascoltare il contributo relativo alla rappresentazione della scuola nei francobolli emessi in Spagna tra il 1850 e il 2014, proposta da Guillermo Navarro Oltra e Juan Senís Fernández (ritirati all'ultimo minuto), che avevano già sottolineato nell'abstract la carenza di francobolli rappresentanti il mondo della scuola, mettendo in evidenza come essa in qualche modo documentasse il valore effettivamente attribuito alla scuola dai regimi e dai governi spagnoli succedutisi nel corso del tempo, anche in periodi in cui era presumibile che l'istruzione pubblica avesse un posto privilegiato all'interno dell'agenda politica (come durante la Seconda Repubblica).

La terza e ultima sessione di lavoro era dedicata alla memoria collettiva della scuola, che è uno degli ambiti di studio più innovativi proposti in questo simposio. La memoria collettiva scolastica può essere fondamentalmente intesa in due modi: da un lato, come la percezione delle esperienze scolastiche vissute da un determinato soggetto quale parte di un'esperienza collettiva, dal momento in cui riconosce un cimelio scolastico in un museo, ascolta il racconto di una esperienza di vita scolastica, ecc.; dall'altro lato, come la rappresentazione della scuola del passato offerta dall'industria culturale, imprimendo nell'immaginario collettivo stereotipi indelebili.

Se le memorie individuali possono essere studiate singolarmente o comparare in quanto fonti, la memoria collettiva può essere studiata solo come «processo», in quanto consiste in una ricostruzione sociale del passato, che deriva dalla fusione del «passato scolastico vissuto» (del quale coloro che ricordano sono stati attori diretti) con «il passato scolastico immaginato» (del quale coloro che ricordano sono stati ascoltatori, lettori e spettatori).

In questo senso, la memoria collettiva discende geneticamente dall'immaginario collettivo, i cui materiali simbolici possono derivare tanto dal patrimonio culturale di una determinata comunità, quanto da nuove formazioni culturali prodotte dall'industria culturale o dal mondo dell'informazione e della

comunicazione. Se, ad esempio, vogliamo capire le ragioni per cui l'attivismo pedagogico è stato rappresentato in un determinato modo in una commedia cinematografica, non si può non prendere in considerazione gli stereotipi e i pregiudizi in voga su questo movimento pedagogico nel momento in cui si stava girando quel film, attraverso l'analisi non solo della cultura popolare, della letteratura o delle trasmissioni televisive, ma anche della pubblicità, dei giornali e dei rotocalchi.

Tuttavia, la memoria scolastica collettiva può essere utilizzata per esaminare un altro possibile focus per la ricerca storico-educativa: l'evoluzione della percezione sociale della educazione, della professione docente e del sistema scolastico, e le sue ragioni. Infatti, studiare le modalità di rappresentazione dell'istruzione, della scolarizzazione e dell'insegnamento nel corso del tempo, oltre a fornire l'effettiva dimensione socio-culturale di questo fenomeno storico (la scuola «vista dall'esterno», più che «dall'interno» come siamo abituati a fare), contribuirebbe a definire le ragioni di alcune ipoteche che ancora oggi gravano sull'archetipo scolastico.

In questo senso, l'inizio di una prima campagna sistematica di studi sulla memoria collettiva della scuola permetterebbe di invertire la prospettiva dalla quale si analizza il fenomeno scolastico nella sua dimensione storica, il cui significato sociale non è determinato solo dalla sovrastruttura culturale elaborata dalle classi dirigenti e perpetuato attraverso una determinata «politica della memoria» (cioè la memoria scolastica pubblica), ma anche dagli stereotipi più comunemente diffusi in ogni società e momento storico.

Le trentadue comunicazioni presentate nella sessione «Memoria collettiva», coordinata da Simonetta Polenghi, si sono concentrate – in particolare – sulla rappresentazione della scuola del passato nelle pellicole cinematografiche e nei documentari (Simonetta Polenghi, Paolo Alfieri/Carlotta Frigerio, Anna Debè Despina Karakatsani/Pavlina Nikolopoulou, Elena Kalinina) e sulle immagini di vario genere, analizzando, ad esempio, l'influenza della circolazione internazionale di incisioni e stampe nel XIX secolo nella costruzione di una memoria visiva transnazionale della scuola (Sjaak Braster/María Del Mar Del Pozo Andrés), la costruzione di una memoria collettiva della scuola spagnola attraverso le cartoline fotografiche postali a tema scolastico nel XX secolo (Antonio Viñao/María José Martínez Ruiz Funes) e il più recente uso di fotografie scolastiche storiche in Francia per la produzione di libri di ampia diffusione commerciale (Marie-Elodie Valat/Sylvain Wagnon).

Il contributo di Marta Brunelli – dedicato allo scambio di memorie fotografiche della scuola attraverso i *social media* – si colloca tra l'analisi della funzione mnemogenetica delle immagini e lo studio del processo di ridefinizione e di collettivizzazione della memoria scolastica attraverso il web, come ad esempio nelle voci enciclopediche di Wikipedia (Georgina Maria Esther Aguirre Lora/Gianfranco Bandini/Stefano Oliviero) o negli spazi virtuali di collettivizzazione del ricordo su Facebook (Daniel Escandell Montiel).



Di grande interesse si sono rivelati anche i lavori presentati sulla veicolazione di una determinata immagine pubblica della formazione professionale in Italia alla fine del XIX secolo attraverso le pubblicazioni commemorative degli anniversari di fondazione delle scuole professionali (Valeria Viola) e la tradizione editoriale delle *memorias escolares* (annuari) pubblicati annualmente nei collegi religiosi spagnoli del XX secolo (Paulí Dávila Balsera/Luis Maria Naya Garmendia), in particolar modo per quanto attiene al concetto di «patologizzazione della memoria» col quale si descrive il processo di preselezione degli elementi mnemonici inclusi in queste pubblicazioni annuali e la conseguente predeterminazione dei ricordi relativi a quella esperienza educativa.

Se si esclude il lavoro presentato da Christiane Connan-Pintado sulla rappresentazione della scuola nella letteratura per l'infanzia francese, colpisce l'assenza di studi specifici sui mutamenti nella percezione sociale della scuola e della professione docente attraverso la letteratura, che è una componente fondamentale dell'industria culturale che abbiamo visto influenzare notevolmente la memoria scolastica collettiva.

Le tre sessioni parallele sono state seguite da altrettante sessioni plenarie, nel corso delle quali i coordinatori delle varie sessioni di lavoro (Antonio Canales F. Serrano, Joaquim Pintassilgo e Simonetta Polenghi), hanno proposto una riflessione generale su ciascuno dei tre aspetti della «memoria scolastica» (individuale, collettivo e pubblico) e hanno offerto una breve sintesi dei contenuti e dei dibattiti delle rispettive sessioni. Il simposio si è concluso con una conferenza di Agustín Escolano Benito (Centro Internacional de la Cultura Escolar) dal titolo *Arqueología de la memoria y cultura de la escuela*.

Il Simposio internazionale su *La memoria escolar* ha offerto alla comunità scientifica internazionale una prima riflessione sistematica sul tema, definendo alcune coordinate teoriche generali, fornendo criteri metodologici e suggerendo possibili contaminazioni con l'antropologia dell'educazione e la sociologia dei processi culturali.

Una selezione dei migliori venti lavori presentati in questo simposio sarà pubblicata nel volume *School Memories. New Trends in the History of Education*, curato da Cristina Yanes Cabrera, Juri Meda e Antonio Viñao, la cui uscita è prevista per la fine del 2016 presso l'editore Springer.



## Remo Fornaca (1925-2015)

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**ABSTRACT:** This paper intends to present and celebrate the role and work of the pedagogue Remo Fornaca, professor of the history of education, who died on 17 January 2015. The colleague and friend George Chiosso will reconstruct the main steps of his academic and scientific career.

**EET/TEE KEYWORDS:** History of Education; Historical and educational Methodology; Historiography; Remo Fornaca; Italy; XX<sup>th</sup> Century.

Quando alla vigilia del suo pensionamento un gruppo di colleghi e amici concordò di preparare un volume in onore di Remo Fornaca non fu difficile trovare il motivo portante intorno a cui invitare i maggiori studiosi di pedagogia italiani a dare il loro contributo e a testimoniare la loro stima verso il collega che lasciava l'Università. Tutti si trovarono d'accordo di centrare il libro intorno alla nozione di laicità. Nel 2002 apparve così il volume *Laicità e Scienze dell'educazione. Studi in onore di Remo Fornaca* (Torino, Tirrenia Stampatori).

Nel ripensare ora, ad anni di distanza e in occasione della scomparsa avvenuta nella sua città natale, Asti, il 17 gennaio 2015, all'operosa attività svolta e alla eredità culturale che ci ha lasciato Remo quella scelta si dimostra inappuntabile. La cifra della laicità ne ha infatti contrassegnato l'impegno di intellettuale e uomo di scuola, prima come docente, poi come preside nei licei e infine come professore universitario nell'ateneo torinese, incaricato di Storia della Pedagogia dal 1962 e infine come titolare della cattedra di Pedagogia dal 1970. Un curriculum, sia detto in parentesi, ormai inconsueto perché purtroppo le carriere universitarie si consumano quasi tutte all'interno della vita accademica. Molto più opportunamente fino a qualche decennio orsono si registrava un notevole interscambio tra scuola e Università, arricchendo la cultura accademica anche sul versante dei problemi e della vita scolastica.

Il prof. Fornaca restò sempre molto legato al mondo della scuola nella quale vedeva un'espressione della vita culturale del Paese e un'opportunità di crescita e sviluppo.

Vorrei in via preliminare brevemente approfondire la laicità di Remo Fornaca, partendo da questo interrogativo: chi è la persona laica? Direi così: essere laici vuol dire esseri capaci di autonomia intellettuale, saper argomentare i frutti della ricerca senza la nebbia dell'ideologia, mai prendere nulla per buono che non sia stato vagliato alla luce dei principi che guidano eticamente il nostro impegno, esercitare il dubbio metodico senza tuttavia scadere nello scetticismo, avere un alto senso delle istituzioni e agire con rigore nel loro servizio. Il laico ha fiducia nella razionalità, nel confronto, nel dialogo, disposto a ricredersi se ritiene di essere in errore.

La vita di Remo ha testimoniato questo tipo di laicità con la sobrietà e la linearità della sua esperienza umana di cui chi lo ha conosciuto ha potuto approfittare. Lo stanno a testimoniare la sua coerenza, l'intenso lavoro scientifico su cui tra breve ritornerò, il rispetto delle persone e, in specie, degli studenti, la partecipazione attiva a tutti i momenti della vita universitaria anche a quelli meno noti e gratificanti, ma non meno importanti (contribui, per esempio, insieme all'allora rettore Umberto Dianzani a riscrivere lo Statuto dell'ateneo torinese negli anni '90, compito tanto importante e delicato quanto ingrato e faticoso). La sua laicità fu norma e regola posta al servizio delle istituzioni.

La coerenza con questo principio manifestò fin dagli inizi dei suoi studi: non a caso il primo dei suoi saggi più importanti che lo fecero apprezzare nel mondo della cultura pedagogica fu l'indagine su Carlo Cattaneo, un autore la cui laicità si connotò per la sua fiducia nella ragione e nel metodo scientifico, per l'esaltazione del principio di libertà e la certezza che esso fosse garantito da una democrazia fondata sulla partecipazione dei diversi gruppi sociali, per la separazione tra Stato e Chiesa

Questa laicità – che credo di poter dire si configurò come una vera e propria ragione di vita – il prof. Fornaca coltivò attraverso l'esercizio di una libertà rispettosa, ma senza soggezioni.

Nato il 29 ottobre 1925, appartenne alla generazione che si trovò a dover ricostruire il Paese dopo una guerra disastrosa e le conseguenze ancora vive di un regime che aveva negato la libertà. Negli anni '50 e '60 nei quali egli aveva cominciato a insegnare e a pubblicare i suoi primi studi erano ancora molto marcate le contrapposizioni politiche e accademiche e i sottili – e talvolta non esplicitati – rapporti con la politica e i relativi condizionamenti che governavano non solo la politica scolastica, ma anche le carriere universitarie. La libertà vissuta quasi come un dovere morale cara a Fornaca non pagava, era più facile era identificarsi in qualche partito o fazione di partito.

Vorrei richiamare un episodio modesto in sé, ma indicativo di che pasta fosse la coerenza di Remo. La scelta dell'editore con cui dare alle stampe la maggior parte dei suoi libri fu coerente con il rispetto della libertà. Scelse di affidarsi soprattutto all'editore Armando di Roma, allora un piccolo editore, indipendente, al di fuori delle contese tra cattolici e ambienti laici (neoilluministi e marxisti) che avevano le loro bandiere rispettivamente nell'editrice bresciana

La Scuola e nella Nuova Italia di Firenze e, più tardi, negli Editori Riuniti di Roma.

Il rigoroso rispetto della libertà propria e di quella altrui gli consentiva di essere davvero un intellettuale laico, ma, desidero sottolinearlo con forza, non laicista: capace anche di prendere le distanze da quei contesti culturali e pedagogici che della laicità si facevano paladini talvolta strumentalmente, finendo per scivolare verso modi di pensare e di agire faziosi, intolleranti, pregiudizialmente orientati.

All'esercizio del binomio laicità-libertà Fornaca si ispirò per tracciare la fisionomia della propria visione educativa e della propria concezione della pedagogia. In un saggio apparso nel 1987 il prof. Fornaca disegnava le tappe del suo itinerario educativo-pedagogico attraverso il richiamo ad alcune significative figure intellettuali che rappresentarono il segno anche della sua ricerca: Carlo Cattaneo, Gaetano Salvemini, Augusto Monti e Lamberto Borghi. Tutte personalità libere che preferirono la via della coerenza a quella del compromesso.

Come è a tutti noto tra questi quattro studiosi soltanto Lamberto Borghi è ascrivibile alla categoria dei pedagogisti. Questa ampia visione dell'orizzonte educativo non esageratamente pedagogizzato non era casuale.

Contro l'eccesso di specialismo, di tecnologismo didattico, di riduzionismo entro gli angusti confini delle pratiche metodologiche che già s'intravedeva in quegli anni e destinato a diventare sempre più evidente e dirompente nel passaggio tra i due secoli, Fornaca prospettava la fisionomia di una pedagogia non autoreferenziale in dialogo con la cultura del suo tempo, disponibile a far tesoro dell'insegnamento degli studiosi che, proprio come quelli che ho appena richiamato, avevano a lungo riflettuto sul rapporto tra ideali, etica e formazione dei giovani e avevano agito di conseguenza.

La traccia lungo la quale si era mosso Augusto Monti – un astigiano come lui che gli fu sempre molto caro e del quale introdusse nel 1994 insieme ad Aldo Alessandro Mola gli *Scritti sulla scuola* – gli sembrava esemplare. Per Monti cultura ed educazione s'intersecavano ed era soprattutto la prima a rendere umano e civile l'uomo; per questo in tutti i cicli e indirizzi scolastici occorreva privilegiare i contenuti culturali, l'approccio ai testi, la padronanza degli argomenti, la maturazione del pensiero, la capacità di dare ordine e linguaggio appropriato al pensiero, la continua verifica dell'attività svolta.

E ancora: una pedagogia che, anziché rinchiudersi nelle aule universitarie e nei piccoli cenacoli di quanti teorizzano cosa sarebbe meglio senza fare nulla, era pronta a valorizzare quelle figure esemplari di educatori che avevano posto la loro militanza a servizio di una nobile causa. Tra questi gli erano particolarmente vicini Danilo Dolci e il fondatore di Nomadelfia, don Zeno Saltini.

Negli ultimi anni – in specie dalla fine degli anni '80 in poi – la sua attenzione andò concentrandosi sui processi di cambiamento in corso orientati nel senso della post modernità, della complessità e della società della conoscenza, allora ancora incipienti e non così evidenti come ci appaiono oggi. L'esaurirsi delle ideologie – per lo meno nel senso che erano state vissute fino a quel momento –

consentivano di praticare larghi e inediti spazi per una democrazia partecipata non più condizionata da visioni contrapposte. Spazi inediti e promettenti di libertà, in altre parole, erano l'esito della caduta del muro di Berlino.

Ma al tempo stesso queste nuove praterie – come ben presto avremmo sperimentato – erano insidiate dal prevalere delle leggi economiche, dalla banalizzazione del senso comune sempre più condizionato dai grandi mezzi di comunicazione di massa, dalle difficoltà connesse ai processi di immigrazione. Nel tumulto di questi cambiamenti Remo Fornaca restò ben saldo nella sua visione del nesso laicità-libertà-democrazia: la complessità – a cui dedicò un importante saggio in un volume del 1991 in collaborazione con Franco Cambi e Giacomo Cives – costituiva una imperdibile opportunità per accrescere la qualità della democrazia, per restare aderenti alla realtà concreta e sfuggire, come gli suggeriva il «suo Cattaneo» alle illusioni metafisiche, per rafforzare i livelli di formazione che egli concepiva strettamente associati ai diritti sociali.

Il trascorrere degli anni lo orientarono verso analisi più critiche: la scuola, in particolare, gli sembrava che corresse il rischio di smarrire la sua autorevolezza culturale e il suo prestigio sociale. Ogni tanto me ne parlava e lamentava, in particolare, che la scelta dei docenti non fosse più rigorosa, convinto com'era – e credo come siamo tutti – che una scuola di qualità è sempre legata alla presenza di insegnanti di valore. L'azione ministeriale gli sembrava troppo debole e orientata più a risparmiare che a investire. Anche talune scelte politiche gli sembrarono poco azzeccate e non posso negare che, con molto tatto e squisita cortesia, mi espresse il suo dissenso sulle scelte nelle quali avevo avuto qualche parte al tempo della cosiddetta riforma Moratti.

2. Vorrei ora tracciare – necessariamente a grandi linee – i principali sentieri di ricerca di Remo Fornaca. Ho detto «a grandi linee» perché, anche solo a considerare, i volumi del prof. Fornaca siamo in presenza di una trentina di titoli. Grande lettore di libri, studioso assai versatile esplorò vari territori della pedagogia e della storia della pedagogia e dell'educazione nonché della metodologia della ricerca. Non lesinò anche di cimentarsi in opere a scopo soprattutto didattico come una *Storia della pedagogia* pluri edita, una *Introduzione alla pedagogia* e soprattutto la trilogia antologica composta dai volumi sulla pedagogia scientifica (in collaborazione con il prof. Di Pol), sulla pedagogia filosofica e sulla didattica e le tecnologie. In particolare l'antologia sulla pedagogia scientifica rappresentò un vero e proprio *best sellers* della letteratura pedagogica, contando numerose ristampe e due edizioni.

Nella impossibilità, dunque, di rendere compiutamente conto della vastissima produzione di Remo concentrerò la mia analisi su pochi aspetti, su quelli che a mio giudizio ne costituiscono l'apporto più significativo alla storia pedagogica e scolastica del nostro Paese.

A Remo Fornaca si devono, prima di tutto, alcuni volumi sulla pedagogia del Novecento che tuttora rappresentano un importante punto di riferimento e vengono regolarmente consultati da quanti ritornano su autori e tematiche del

secolo scorso: testi, come si dice, ormai entrati stabilmente nelle bibliografie. Mi riferisco, in specie, alle ricerche dedicate alla ricostruzione del dibattito politico scolastico precedente l'avvento del fascismo e la riforma del 1923, e all'indagine sui problemi connessi alla ricostruzione della scuola democratica tra Resistenza e Costituente.

Questi due volumi apparvero tra il 1968 e il 1972: bisogna tenere a mente queste date perché in quegli anni le ricerche su temi molto alquanto ravvicinati nel tempo (in specie la ricognizione sugli anni della Resistenza: poco più di due decenni) non erano molto consuete e, anzi, a giudizio più d'uno anche inopportune perché il territorio di indagine era ancora minato dalle valutazioni ed opzioni ideologiche di chi aveva direttamente preso parte a quelle vicende. Voglio dire che per uno studioso già molto stimato, ma non ancora del tutto affermato, sarebbe stato molto meglio guardare all'indietro e collocarsi in un passato erudito e mostrare il proprio valore senza troppo compromettersi. Insomma sarebbe stato più prudente essere più pragmatico e, come si suol dire, «stare al coperto».

Qualche anno più tardi, tra il 1978 e il 1982, Fornaca diede alle stampe due altri volumi che – anche in questo caso – si segnalavano per un analogo interesse contemporaneistico. Nel primo egli passava in rassegna i maggiori esponenti della cultura educativa, pedagogica e politico-scolastica, del primo scorcio del secolo, nel secondo entrava direttamente nel merito del dibattito contemporaneo con la presentazione delle principali questioni in discussione tra dopoguerra e gli anni della contestazione. I due libri erano tra loro strettamente collegati. In pratica si trattava di un unico tentativo di delineare una storia pedagogica dell'Italia articolata in tre grandi medaglioni, l'età giolittiana, il fascismo e l'Italia repubblicana.

Al di là dell'approccio contemporaneistico che introduceva nella storiografia pedagogica di quegli anni elementi di novità, i saggi di Fornaca si fecero notare anche per altri aspetti, in particolare per lo stretto rapporto tra storia pedagogica e storia culturale e politica. Non solo egli accostava autori inediti per la storia educativa come, ad esempio, i matematici Enriques e Vailati o politici come Sturzo e Gobetti, ma la ricostruzione era condotta ad ampio raggio e non risolta tutto all'interno della cultura solo pedagogica e, al massimo, filosofica. Essa era cioè disposta entro una realtà reticolare nella quale erano richiamati i nessi evidenti e quelli meno trasparenti, e i rapporti causa-effetto non erano disposti su una base lineare, ma in termini – oggi diremmo – di complessità.

Questi scritti meritano attenzione non solo per la puntuale e rigorosa ricostruzione storica, ma anche più in generale per l'insegnamento che ne derivava sul piano della vita quotidiana. Fornaca individuava e denunciava infatti con lucidità i controversi e rischiosi rapporti tra politica ed educazione, il pericolo che derivava dalla subordinazione dei modelli scolastici a concezioni predeterminate non solo durante la stagione della dittatura, ma ogni qualvolta si pretendeva di subordinare la scuola a una concezione totalizzante della vita.

Non v'è comunque dubbio che la filosofia di Gentile e l'equivoco rapporto tra idealismo e fascismo costituirono per Fornaca uno dei punti intorno a cui si sforzò di cogliere le contraddizioni e le strumentalizzazioni più evidenti nel rapporto politica-educazione-pedagogia. Dietro espressioni imponenti come «libertà dello Spirito» e la sovranità dello Spirito e altre simili, Fornaca coglieva le compromissioni con un regime che andava in una direzione totalmente contraria e che in nome di una libertà superiore cancellava le libertà individuali. Le sue simpatie si rivolgevano, per restare in quei primi decenni del secolo scorso, all'altra grande protagonista della pedagogia italiana e cioè Maria Montessori sulla quale tornò più volte e alla cui conoscenza si dedicò anche come esponente dell'Opera Nazionale Montessori.

La Montessori gli appariva «l'unica pedagogista italiana a non soffrire per formazione, per cultura, per esperienza delle ristrettezze di una mentalità provinciale e nazionale, senz'altro la meno toccata da pregiudizi sociali, religiosi, politici, razziali e con una larga apertura umana e solidale». Ne apprezzava, in particolare, il punto di partenza e, al tempo stesso di arrivo: e cioè la centralità del bambino che cresce, acquista la sua autonomia mediante un processo spontaneo, non coattivo, centrato sulla libertà.

Nella capacità di sciogliere con autorevolezza nodi storici assai difficili da decifrare affidandosi a una pluralità di letture è possibile ritrovare in Fornaca l'impronta lasciata dal maestro degli anni giovanili, Angiolo Gambaro con il quale studiò nell'ateneo torinese e di cui fu per qualche tempo assistente. Storico assai raffinato della pedagogia e della cultura religiosa, con una particolare attenzione per l'Umanesimo e il Risorgimento, Gambaro fu un sacerdote a lungo in odore di modernismo e in difficili rapporti con Chiesa-istituzione.

L'altro polo storiografico che tenne sempre presente fu quello praticato da Lamberto Borghi autore della monografia *Educazione e autorità nell'Italia moderna*, un lavoro del 1951 nel quale lo studioso fiorentino ripercorreva la storia educativa nazionale all'insegna del rapporto autorità-libertà, con una netta prevalenza del primo polo, motivo che ricorre anche in molte pagine di Fornaca. Anche se collocati su sponde ideali assai diverse il prete Gambaro e il Borghi di fede politica azionista avevano qualcosa in comune e cioè la difesa della libertà, in Gambaro modellata sull'insegnamento di Erasmo da Rotterdam e in Borghi nella sua vicinanza e simpatia per l'evangelismo della tradizione quacchera. Nell'uno e nell'altro caso un accostamento rispettoso e sinceramente interessato alla questione religiosa sorvegliato dalla razionalità.

Come fosse complesso resistere al richiamo e alla strumentalizzazione politica – oggi potremmo forse dire alle sirene del mercato o alla forza persuasiva della virtualità – Fornaca lo denunciava in un saggio del 1978 nel quale passava in rassegna le principali questioni educativo-scolastiche sul tappeto. Così scriveva: «Gli schieramenti politici, economici, religiosi sanno che dalla gestione dei modelli educativi e scolastici dipenderanno molte cose, compresa la realizzazione del modello politico per cui si battono. E di fronte al rischio di subalternità



silenti e meno roboanti di quelle del passato c'è bisogno di chiarezza di idee e di analisi. Per chi non ha venduto l'anima in anticipo, per chi non intende ritirarsi o praticare l'aventinismo pedagogico, conviene dedicare molte energie a capire il nostro tempo e a chiarire il senso delle direzioni di marcia (*Dove va la pedagogia in Italia?*, p. 96)».

Questa ampia citazione può rappresentare un monito e un invito. Un monito perché la scuola sfugga al rischio – oggi purtroppo riemergente – di sembrare un'esperienza «che non serve», ma, come ha detto il linguista ed ex ministro dell'Istruzione Tullio De Mauro, nessuna nazione può sopportare due generazioni di ignoranti.

L'invito si può così descrivere: accompagnare la crescita dei nostri giovani – su questo punto Remo tornò più volte nelle ultime telefonate – con la forza della ragione e della formazione della capacità critica in un mondo nel quale sembrano prevalere i modelli dell'apparenza e della visibilità piuttosto che la sostanza dei problemi e la coerenza delle persone.



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Gvirtz (Universidad de San Andrés, Argentina); Robert Hampel (University of Delaware, USA); Elemér Kelemen (Hungarian Academy of Sciences, Hungary); Pigga Keskitalo (Sámi University College, Norway); Adriana Kičková (University of Nitra, Slovakia); Francisco Javier Laspalas Pérez (Universidad de Navarra, Spain); Daniel Lindmark (Umeå University, Sweden); Juri Meda (Università degli Studi di Macerata, Italy); Maria Cristina Morandini (Università degli Studi di Torino, Italy); Gabriela Ossenbach Sauter (Uned, Spain); Michel Ostenc (Université de Angers, France); Riccardo Pagano (Università degli Studi di Bari, Italy); Merja Paksuniemi (Institute of Migration, Finland); Elisabetta Patrizi (Università degli Studi di Macerata, Italy); Furio Pesci (Università La Sapienza di Roma, Italy); Helena Pimenta Rocha (Universidade Estadual de Campinas, Brasil); Pablo Pineau (Universidad de Buenos Aires, Argentina); Joaquim Pintassilgo (Universidade de Lisboa, Portugal); Tiziana Pironi (Università degli Studi di Bologna, Italy); Simonetta Polenghi (Università Cattolica del Sacro Cuore di Milano, Italy); Edvard Protner (Università of Maribor, Slovenia); Erika Sarivaara (Sámi University, Norway); Marika Savukoski (Municipality of Pyhäranta, Finland); Miguel Somoza Rodriguez (Uned, Spain); Bernat Sureda García (Universidad de las Islas Baleares, Spain); Fabio Targhetta (Università degli Studi di Padova, Italy); Ariclé Vechia (Universidade Tuiuti do Paraná-Curitiba, Brazil); Javier Vergara (UNED, Spain).

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