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# Contents

## Indice

### *Essays and Researches* Saggi e Ricerche

- 11 Milka Terziyska  
Cultural and educational role of the Rila Monastery in the history of Bulgaria (X-XIX centuries). A bridge between eras, generations and cultures
- 27 Alejandro Gómez Camacho  
Los maestros ortógrafos en el Siglo de Oro Español
- 41 Luisa Consuelo Soler Lizarazo, Noemi Cinelli  
Politiche educative nella *Nueva Granada* e nel *Reino de Chile*. Caballero y Góngora e Salas y Corbalàn, due intellettuali nel Secolo dei Lumi
- 59 Teresa González Pérez, Gilberto Martín Teixé  
Teacher Training in Spain from late Francoism to the beginning of the Constitutional Monarchy: Reforms and Challenges
- 81 Sebile Kutgün Kayaduman, Giovanni Patriarca  
Per una storia del sistema educativo dall'Impero Ottomano alla Turchia contemporanea
- 101 Neslihan Kansu-Yetkiner  
Banned, Bagged, Bowdlerized: A Diachronic Analysis of Censorship Practices in Children's Literature of Turkey

- 121 Anna Ascenzi, Roberto Sani  
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 Two
- 151 Alessandro Sergi  
The Scientific Method in Giuseppe Sergi's Pedagogy
- 167 Natalia Naydenova  
We Shall See Him as He Is: Image of God in Soviet  
Children's Literature of the 1960s
- 187 Dorena Caroli  
«Science and didactics» in school textbooks for secondary  
school during de-Stalinization in the Soviet Union (1954-1962)
- 213 Simone Amorim, Leyla de Santana, Hugo de Almeida  
The *Source of Truth or Path to Virtue* brochure and the  
apprehensions about the Nineteenth century primary  
instructions in the Sergipe Province
- 227 Anna Debè, Simonetta Polenghi  
Assistance and education of mutilated soldiers of World War I.  
The Italian case
- 247 Luca Montecchi  
Between the recovery of abandoned children and vocational  
training: the Italian training-ships between the Nineteenth  
and Twentieth century
- 267 Lada Duraković  
Music as the Educational Mean in the Making of the  
«Socialist Man»: Music Education in Primary Schools of  
Croatia (1945-1965)
- 291 Haifeng Hui  
China and the World: Children's Literature Studies as a  
Discipline and its Development
- 305 Andrea Bobbio  
From mother to woman. The child's socialization in the

Italian kindergarten from the 60s to the 90s. Assistance, citizenship and education

- 317 Sabrina Fava  
Per un'educazione giovanile europea alla lettura: «Il premio europeo Città di Caorle» (1962-1968)
- 349 Juan Manuel Fernández-Soria  
Los tiempos de la memoria del Instituto para Obreros
- 373 Marnie Campagnaro  
Seduction and Sedition of the “Table” in the History of Children’s Literature

*Sources and Documents*  
Fonti e documenti

- 393 Luca Montecchi  
Il rinnovamento dei «metodi scolastici» nello Stato Pontificio nel carteggio tra Vitale Rosi e Ottavio Gigli (1845-1847)

*Critical Reviews and Bibliography*  
Rassegne critiche, Discussioni, Recensioni e Bibliografia

*Critical Reviews / Rassegne critiche*

- 427 Vučina Zorić  
The Influence of ideas of J.F. Herbart and the Herbartianism in Slovenia during the Period of the Austro-Hungarian Monarchy
- 439 Luigiaurelio Pomante  
«La larga noche de la educación española». Il sistema educativo spagnolo negli anni della dittatura franchista
- 451 Giorgio Chiosso  
Fare pedagogia a Trieste (1960-2010)
- 457 Fabio Targhetta  
*Il romanzo d'un maestro* di Edmondo De Amicis: le ragioni della sua recente riscoperta

- 465 Giorgio Chiosso  
Il coraggio di dire “cose nuove”. A proposito di quattro recenti libri

*Forum / Discussioni*

- 475 Wolfgang Brezinka  
The subject of Pedagogy at Austrian universities and teacher training between 1774 and 1918
- 497 Anna Ascenzi, Marta Brunelli  
Accomplishing «the silent mission of Italian women at war». The fascist “pedagogy of war” for women: from the kitchen front to the war garden
- 523 Giorgia Grilli  
L’importanza di chiamarsi *letteratura*. La letteratura per l’infanzia e le tesi di Christopher Booker sull’origine e la funzione delle storie
- 537 Giordana Merlo  
Time and reading
- 549 Milan Ligoš  
Aus der Forschung der Schülermotivation im Muttersprachenunterricht in dem letzten halben Jahrhundert (In Bezug auf Slowakisch als Muttersprache)

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

- 565 Emma Beseghi  
One hundred years since the birth of Dahl: an International conference on current perspectives of research. *Rebel Stories and Glittering Eyes. One Hundred Years with Roald Dahl* (Bologna, Children’s Book Fair 2016, April 5<sup>th</sup> 2016)
- 573 Anna Ascenzi, Kira Mahamud, Elisabetta Patrizi  
Two recent international events on textbook research. The Symposium *Education in periods of political transition* and the Workshop *After the War. A New Beginning?*

- 589 Michela D'Alessio  
«Una biografia collettiva degli educatori italiani degli  
ultimi due secoli». Note a margine del seminario di studi su  
*Educatori e istituzioni scolastiche in Italia: percorsi, bilanci e  
prospettive d'indagine* (Potenza, 26 novembre 2015)
- 599 Marnie Campagnaro  
Children's Literature and Play. La conferenza internazionale  
*The Child and the Book* (Breslavia, 19-21 maggio 2016)
- 603 Marta Brunelli, Paulí Dávila Balsera, Luis M<sup>a</sup> Naya Garmendia  
Espacios y Patrimonio Histórico-Educativo / Spaces and  
Historical-Educational Heritage. Balance, suggestions and  
perspectives from the VII Jornadas Científicas of the SEPHE  
and the V Simposio Iberoamericano, Historia, Educación,  
Patrimonio of the RIDPHE (San Sebastián, June 28 - July 1,  
2016)

***International Bibliography***  
**Bibliografia Internazionale**

- 613 Dorena Caroli, Luigiaurelio Pomante  
International Bibliography of History of Education and  
Children's Literature (2015)
- 615 Abbreviations and Acronyms
- 635 Publications: A. Journal Articles
- 755 Publications: B. *Miscellanea* and monographs
- 813 International Referees' Committee (2016)





*Essays and  
Researches*



Saggi e  
Ricerche



# Cultural and educational role of the Rila Monastery in the history of Bulgaria (X-XIX centuries). A bridge between eras, generations and cultures

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**ABSTRACT:** The Rila Monastery is the oldest and largest Bulgarian monastery, permanently connected to the historical fate of the Bulgarian people since its foundation in the tenth century until the liberation (1878). It has had a great importance in the cultural life of the Bulgarians during the entire period of its existence, but it was especially important during Ottoman rule and Renaissance (XV-XIX<sup>th</sup> Centuries). One of the most important prerequisites for that is the cult of its founder St. Ivan Rilski who turned in the first centuries after his death not only in Bulgarian, but in a Balkan and Slavic saint. It is essential that the status of the Rila Monastery as stauropegial (patriarchal). Having outgrown the nature of a cult center in the Middle Ages, the Rila monastery became a national cultural center during the Renaissance and a factor of communication between Bulgarian and other Balkan and Slavic peoples until the liberation.

**EET/TEE KEYWORDS:** Rila Monastery; St. Ivan Rilski (worship); Religious Education; Cultural Identity; Nationality; History of Education; Bulgaria; XV-XIX<sup>th</sup> Centuries.

The Rila Monastery is deeply and permanently linked to the historical fate of the Bulgarian people. In the most difficult and troubled times it kept sacred Bulgarian cultural traditions. Thanks to its founder St. Ivan Rilski and the cult following in the early centuries of its existence the monastery itself as a lamp of the Christian faith, distributor of Slavic literature and education, sustainer of the Bulgarian language and nationality.

### *Prerequisites for the spiritual activity of the Rila Monastery*

There have been several prerequisites that ensured the leading role of the Rila Monastery in the cultural life in the Bulgarian lands since its foundation in the tenth century until the Liberation (1878) and especially during the Ottoman rule and the Renaissance (XV-XIX c.). Firstly, it is the cult to its founder St. Ivan Rilski (876/880-18<sup>th</sup> August 946) who turned in the first centuries after his death, not only in Bulgarian but also in Pan-Balkan and Slavic saint. Insufficient and poor in actual data written sources and distant past throw a thick veil on the lives and works of the Rila hermit, so his image is known to us more legendary light than in his actual historical fact. Initially emerged in public consciousness in that era because of its unusual personality, the official Church canonised him too soon after his death at the end of the tenth century. The 15<sup>th</sup>-century pilgrimage of the relics of the saint caused the spread of his cult among neighboring Balkan and Slavic peoples and turning it into the most respected Orthodox saint and to Bulgarians he is the spiritual patron and protector occurred in times of trouble and disaster. The transfer of the relics of St. Ivan of Rila itself from Tarnovo to the Rila Monastery in 1469 was the first known occurrence of the Bulgarian spiritual life after the fall of Bulgaria under Ottoman rule (1396) and gives his place of abode primary spiritual center in the centuries of the slavery.

Viability and sustainability of the cult of St. Ivan Rilski over the centuries are that thread that connects various periods of the history of the Rila Monastery and ensures its continuous ten-century presence in the spiritual life of the Bulgarians. Due to its location in the inaccessible depths of the Rila Mountains and the protection of local rulers, the Rila Monastery is saved from Muslim element that swept the Balkans in the late fourteenth and early fifteenth century, although it lost its privileged position from before the conquest. Although data on the history of the monastery from its foundation to the fall of Bulgaria under Ottoman rule are scarce, they give reason to believe that during X-XIV centuries Rila monastery has existed continuously. It was proven by the attention paid to it by the government. It was generously endowed with lands and privileges of Bulgarian rulers Ivan Asen II (1218-1241), Kaliman I (1241-1246) and Ivan Shishman (1371-1395) who the

monastery was trying to defend throughout the five centuries of Ottoman rule period. The very first Turkish sultans – Bayezid I (1389-1403) and Mehmed I (1421-1423) –, issued a special decree confirming the rights of the monastery (that subsequently occurred in each successive Turkish sultan). Resumption of the Rila Monastery in the middle of the fifteenth century, probably with the help of the Ohrid Archbishopric, the establishment of relations with Russia «St. Panteleimon» of Mount Athos and the return of the relics of St. Ivan Rilski in the Rila Monastery (1469) were essential prerequisites for the conversion of the monastery into a center of literary and educational life in the Bulgarian lands to Liberation.

Of no less importance is the status of the Rila Monastery as stauropegial (patriarchal). Under the jurisdiction of the Patriarchate of Constantinople it issued special documents defining the rights and obligations of the Rila Monastery. Based on its economical interests and regarding it as a source of income in the early nineteenth century, the Patriarchate allowed the monastery to send its *taxidiote* in different Bulgarian towns, which along with its main duties to collect aid and bring worshipers in the monastery, are teachers, preachers and educators in the places where they were. Thus Patriarchate contributed indirectly to the development of the Bulgarian cultural and educational life during the Renaissance and the Rila clerics are one of the main actors in it.

Located on the borders of three major Bulgarian areas – Moesia, Thrace and Macedonia –, the Rila Monastery was a religious center not only for Bulgarians but also for groups of pilgrims from neighboring Balkan countries. For the Orthodox population of the Balkans it was the local Jerusalem. The Rila Monastery became a factor of cultural communication between Bulgarian and other Balkan and Slavic peoples until the Liberation. Documented links between the monastery and Mount Athos, Serbia, Romania and Russia are an evidence for the exchange of religious objects, as well as literary monuments that became conduits for new ideas and trends in literary and educational activities of the Rila monks. This was essential for Russian incunabula, which the library of the Monastery got as a result of its embassies in Russia in XVII-XIX centuries, which undoubtedly had an impact on its readers – monks and guests of the monastery.

### *Spiritual and educational influence of the cult of St. Ivan Rilski*

Founded in the 930s by St. Ivan Rilski as a retreat center, the monastery became a center of religious and educational life in medieval Bulgaria. While far from the major cultural centers in the First Bulgarian Empire (681-1018) – Pliska, Preslav and Ohrid –, there was intense spiritual life in accordance with

the cultural trends of the era. Above all it is the spread of Christianity<sup>1</sup> in the Bulgarian language through oral and written speech. The introduction of the medieval Bulgarian to a new religio-philosophical system, such as Christianity, gave this large-scale activity not only religious but also pedagogical sense and meaning. Associated with this activity are the concepts of ‘teacher’ and ‘teaching’<sup>2</sup>. In this sense St. Ivan Rilski is one of the first Bulgarian teachers and educators. In his Covenant<sup>3</sup>, written in 941, he advises his students to educate their people and to strengthen the Christian faith and values in them. The victory of Christianity over paganism was considered a victory of good over evil. Faith has given extraordinary inner strength of people to cope with difficulties and overcome obstacles in their lives, which was considered a path to salvation of the soul. Under the Covenant of St. Ivan Rilski his disciples and followers kept «holy faith without blemish and free from any evil thought (malice prepenze)» as they adopted it from ‘Fathers’<sup>4</sup>. They did not allow departure from the established religious norms and rules, which made the Rila Monastery a stronghold of Orthodox in its classic look. This defines the role the Rila saint and its related cloister had in the upcoming times of trouble and trials for the Bulgarians.

In the second half of the alarming and crucial for Bulgaria fourteenth century the last Bulgarian Patriarch Evtimiy<sup>5</sup> reminded his contemporaries of the moral heroism of St. Ivan Rilski. Patriarch Evtimiy wrote about the Life of the saint to help the integration of their countrymen to good because St. Ivan Rilski was an example of a virtuous life. In that century torn by social conflict, political strife, ideological struggles and heretical movements the example of the saint can offer significant benefits to everyone<sup>6</sup>. The threat of Islamic storm that threatens to engulf the Balkans resound with renewed vigor those elements

<sup>1</sup> Conversion of the Bulgarians is the process of introducing Christianity in Bulgaria, starting in 864. This was during the reign of tsar Boris I (852-889), the other main contribution is the introduction of Cyrillic alphabet in Bulgaria.

<sup>2</sup> I. Duychev, *Rilskiyat svetets i negovata obitel* [The Saint from Rila and His Monastery], Sofia, Biblioteka “Zlatni zarna”, Redaktor-stopanin: Slavcho Atanasov, 1947, p. 27; D. Petkanova-Toteva, *Hilyadoletna literatura* [Millennial literature], Sofia, Izdatelstvo “Nauka i izkustvo”, 1974, pp. 211-239.

<sup>3</sup> The Covenant of St. Ivan Rilski (941) was the only documentary evidence of the initial period of the existence of the Rila Monastery. It is not stored in the original, but copies of the nineteenth century (Y. Ivanov, *St. Ivan Rilski i negoviyat manastir* [St. Ivan Rilski and his monastery], Sofia, Balgarska akademija na naukite, 1917, pp. 129-142; Duychev, *Rilskiyat svetets i negovata obitel*, cit., pp. 138-149; I. Goshev, *Zavetat na Ivana Rilski v svetlinata na starobalgarskite i vizantiyskite literaturni predania ot IX-XIV vek* [The legacy of Ivan Rilski in the light of the Old Bulgarian and Byzantine literary traditions of IX-XIV centuries], «Godishnik na Duchovnata Akademia ‘Sv. Kliment Ochridski’», vol. 4, n. 30, 1954/55, pp. 427-507).

<sup>4</sup> Duychev, *Rilskiyat svetets i negovata obitel*, cit., pp. 138-149.

<sup>5</sup> Evtimiy of Tarnovo was Patriarch of Bulgaria between 1375 and 1393. Regarded as one of the most important figures of medieval Bulgaria, Evtimiy was the last head of the Bulgarian Orthodox Church in the Second Bulgarian Empire (1185-1396).

<sup>6</sup> Patriarch Evtimiy, *Sachinenia* [Writings], Sofia, Izdatelstvo “Nauka i izkustvo”, 1990, p. 41.

of the life of St. Ivan Rilski, underlining that it belongs to the Bulgarian people and Christianity. The relationship between Bulgarian origin and the Christian religion gave birth to a bright, strong and monolithic image, destined to be the savior, protector and defender of the Bulgarians. In this historical moment, when Bulgaria is in an imminent danger, the ethnic unity achieved on the basis of the Christian religion is of utmost importance. This unity would help to strengthen the power of the state. In this regard, the examples of those bright individuals that have become symbols of the Christian faith through martyr life for the sake of that faith had their role in the spiritual bond between generations, ages, backgrounds, and geographical areas. In his quest for spiritual unification of the nation in the torn Second Bulgarian Empire (1185-1396) Evtimiy sought appropriate examples. He found them in images of saints, including St. Ivan Rilski as a bright Bulgarian character. So the image out of the Rila Monastery enriched and became stronger through spiritual the potential of different ages and became a symbol of continuity and eternity in the life of the Bulgarians.

The geographic perimeter, where the cult of St. Ivan Rilski was spread, reveals the sphere of influence of this moral ideal – not only on the entire Bulgarian land, but also far beyond its borders – Russia, Ukraine, Hungary, Serbia, Moldavia, Romania, Mount Athos (Greece). His example, in which modesty and self-denial were the main virtues, was compared by the prominent Bulgarian medievalist Ivan Duychev with the one of st. Francis of Assisi – one of the most prominent personalities of western monasticism<sup>7</sup>.

### *Rila Monastery – the guardian of Bulgarian national tradition during the Ottoman rule*

Ottoman invasion slowed down but did not stop the cultural development of the Bulgarian nation. As a result of the ensuing crisis, a significant part of the medieval Bulgarian intellectuals emigrated from the country and many valuable literary monuments were exported. Deprived of their creative elite literary and educational centers of the Second Bulgarian Empire cease to exist. The center of literary life shifted to the western Bulgarian lands where conditions were more favorable. Surviving monasteries became guardians of the literary tradition and major centers of educational life and the Rila Monastery had a prominent place. In the XV century stored there and continued to develop were the literary traditions of the largest cultural and educational center since before the Turkish conquest - the Tarnovo Literary School. In there activities the Rila writers of the first centuries of Ottoman rule they were guided by conscious effort to collect and preserve works of Old Bulgarian literature. They enriched the library of

<sup>7</sup> Duychev, *Rilskiyat svetets i negovata obitel*, cit., p. 376.

the Rila Monastery and became a leading literary and educational center in the Bulgarian lands. The period between XV and XVII centuries was crucial to the preservation of Bulgarian culture and national tradition and Rila writers have a significant contribution to this.

Political situation in the Bulgarian lands during XV-XVII centuries determined the nature of literary and educational life, concentrated mainly in the monasteries. The writers of the first centuries of Ottoman rule, who were mainly clergymen, established continuity between the era of slavery and the past free Bulgarian state, which was their great merit<sup>8</sup>. By copies of the works of Old Bulgarian and Byzantine literature they saved them for later times. Rich spiritual culture inherited from the Middle Ages and stored by those transcripts was a major factor for the preservation of Bulgarian nationality in the first centuries of slavery. In this aspect, the role of the Rila Monastery as a successor of the traditions of the second «golden age»<sup>9</sup> of Bulgarian culture was essential. Along with the preservation of manuscripts of Tarnovo Literary School in the Rila scriptorium there was lively activity. There were collected, edited and transcribed books and collections – mainly theological and ecclesiastical. Analysis of their content reveals the ideas that have guided the drafters – ideas characteristic of literary and educational life in Bulgarian lands from that period.

Vladislav Gramatik (Vladislav the Grammarian) was one of the writers who have worked in the Rila Monastery in the second half of XV century, to whom we owe the preservation of valuable works of Old Bulgarian original and translated literature. Intertwining Bulgarian themes with common Slavic and Pan-Balkan ones and bringing forward the idea of religious affiliation were characteristic of the work of Vladislav Gramatik, which he forwarded to the

<sup>8</sup> I. Duychev, *Rolyata na tsarkvata za zapazvane na balgarskata narodnost prez rannite vekove na osmanskoto vladichestvo* [The Church's role in the preservation of Bulgarian nationality in the early centuries of Ottoman rule], in *Izvestia na balgarskata patriarshia, tsarkovno-istoricheski I arheologicheski institut. Tsentralen tsarkoven istoriko-arheologicheski musey* [Proceedings of the Bulgarian Patriarchate, Church History and Archeology Institute. Central Church Historical and Archaeological Museum], Vol. 1, 1978, pp. 65-84.

<sup>9</sup> «Golden Age» is called the period of cultural bloom of the Bulgarian state during the reign of Tsar Simeon the Great (893-927) when flourishing literature, architecture and art in medieval Bulgaria. Second «golden age» is arbitrary name for the period of the reign of Tsar Ivan Alexander (1331-1371), during which there was rapid development of literature, construction and religious life in Bulgaria with capital at that time Tarnovo (Iv. Bozhilov, *Tsar Simeon Veliki (893-927): Zlatniyat vek na Srednovekovna Bulgaria* [Tsar Simeon the Great (893-927): The Golden Age of Medieval Bulgaria], Sofia, Izdanie na Otechestvenia front, 1983; V.N. Zlatarski, *Istoria na balgarskata darzhava prez srednite vekove* [History of the Bulgarian state in the Middle Ages], Sofia, Fototipno izdanie, Akademichno izdatelstvo "Prof. Marin Drinov", 2002, toma 1; Id., *Bulgaria prez XIV i XV vek* [Bulgaria in XIV and XV centuries], Sofia, Lektsionen kurs, Izdatelstvo "Iztok-Zapad", 2005; Y. Andreev, *Bulgaria prez vtorata chetvart na XIV vek* [Bulgaria in the second quarter of XIV century], Veliko Tarnovo, Universitetsko izdatelstvo, 1993; Iv. Gyuzelev, *Sachinenia* [Writings], Vol. 5, toma 4: *Uchilishta, skriptorii, biblioteki i znaniya v Bulgaria XIII-XIV vek* [Schools, scriptoria, libraries and knowledge in Bulgaria, centuries XIII-XIV], Sofia, Izdatelstvo "Zahari Stoyanov", 2014).



other Rila writers from the second half of XV century. Yet in his first known collections («Predeli» of 1456, a Collection of Zagreb in 1469, «Andrianti» from 1473) he appears a convinced defender of Orthodoxy and the aspirations of the Western Catholic Church, and the encroachment of Islam. Wherever he worked – in Novo Bardo, Mlado Nagorichino, Herzegovina, Monastery of Zhegligovo «Sv. Bogoroditsa», s. Ezhevo (Serres), in the Rila Monastery – Vladislav Gramatik stood firm and steadfast positions of Orthodoxy. The fact is that he did not specify their nationality, but his work as a writer shows what are the guidelines in his work, namely the strengthening of Orthodoxy and cultural cohesion of the Balkan peoples. Vladislav Gramatik understood the role of the Orthodox religion as a liaison for the Balkan peoples at a time when the political system was destroyed. He conveyed that idea through skillful selection of works that copied. In them the reader found memories from the past, comfort in the present and hope for the future.

Ideas of spiritual unifying and mobilizing defenses people role of the Orthodox faith in the works of Patriarch Evtimiy were undertaken by representatives of the literary elite in the XV century. Evtimiy of Tarnovo himself along with *Gregory Tsamblak*, *Constantine of Kostenets*, Vladislav Gramatik, Dimitar Kantakuzin, Mardariy of Rila and many other known and unknown writers of the time connected life and work with a variety of Orthodox centers of the peninsula. They created a spiritual community that outgrew ethnic, national and historical borders. Those writers demonstrated less ethnical affiliation than religious self-consciousness.

In the difficult conditions of spiritual activity Rila writers worked in XV-XVII centuries they sought the most valuable things created in the previous era, carried it over the centuries and transmitted it to future generations. Anyone who has had the opportunity to get acquainted with these works, enriched their spirit with one of the highest achievements of Christian literature. What is most important is the Rila manuscripts were generally available. Evidence of that were the numerous inscriptions left on them<sup>10</sup>.

Presence in the spiritual life of the Monastery Brotherhood in the fifteenth century of minds and educated figures such as Vladislav Gramatik, Dimitar Kantakuzin, abbot Theophanes, Mardariy of Rila and others, was one of the main factors for the establishment of the monastery not only as a literary but also as an educational center during the Ottoman rule. Next two centuries were times of cultural and educational impact of the Rila Monastery in the Bulgarian lands and beyond their borders. Literary and educational traditions from before the Ottoman conquest, preserved in the Rila monastery during that

<sup>10</sup> E. Sprostranov, *Opis na rakisite v bibliotekata pri Rilska manastir* [Inventory of manuscripts in the Rila Monastery's Library], Sofia [Izd. na Svetata Rilska obitel], 1902; B. Raykov, Hr. Kodov, B. Hristova, *Slavyanski rakisite v Rilska manastir*, Vol. 1., Sofia, Izdatelstvo "Nauka i izkustvo", 1986; B. Angelov, *Neizvestni rakisite na Mardariy Rilski* [Unknown manuscripts of Mardariy of Rila], «Starobalgarska literatura», n. 6, 1980, pp. 50-52.

period played a major role not only in the cultural communication between the Orthodox Balkan and Slavic peoples, but also in the process of national revival of the Bulgarian people. Providing those links expressed one of the biggest merits of the Rila Monastery in the Bulgarian cultural history. In XV-XVII century perception was done there, also exchange and dissemination of spiritual values, which gave the Rila Monastery the important role of a bridge between generations, nations and epochs.

### *Rila Monastery and the Renaissance of the Bulgarian people*

Due to the specific historical conditions the relationship between literature and maintenance of educational traditions was a feature of cultural life in the Bulgarian lands during the Renaissance. The tendency to a person combining various functions relating to the protection of faith and language as a weapon against the aspirations of assimilation oppressors remained to the middle of XIX century. This applied strongly to the Rila clergy. Thanks to their work the Rila Monastery was one of the pillars of the 'state of mind' (Dmitry Likhachov) that kept the Bulgarian cultural traditions and pass them on from generation to generation for centuries. Rila clergymen brought some of the most advanced ideas of their time and were active participants in the cultural processes in Bulgaria during the Renaissance. Through their work in defense of the Bulgarian language and culture they deserved the «Orthodox-national missionaries for the spiritual revival of the Bulgarian people»<sup>11</sup>. Without this activity of cultural and educational field a struggle for spiritual and political liberation of the Bulgarian people would be unthinkable. In this sense their apostolic mission of scholars, teachers and educators must be considered and evaluated.

The Renaissance (XVIII-XIX c.) was the most documented period in the history of the Rila monastery until the Liberation. While reports of previous periods carried from the monastery educational activities had mainly indirect nature and were associated with the state of literature, during the Renaissance there was a direct evidence of the convent school, of teaching activity of a number of monks, educational, preaching and teaching activities of the Rila clergymen. In the school found by Neofit Rilski during the second quarter of the XIX century were prepared teachers who were among the most wanted by Bulgarian municipalities. With its network of convents that the monastery had in almost all Bulgarian cities, and the most capable monastic brothers as mendicant friar sent, its spiritual influence extends to all social strata in the

<sup>11</sup> St. Tsankov, *Novi dannii za istoriyata i uredбата na Rilskia manastir* [New data on the history and regulation of Rila Monastery], «Godishnik na Sofijskija universitet. Bogoslovski fakultet», vol. XIII, 1935-1936, pp. 1-49 (18).

Bulgarian lands. Thus Rila Monastery directly and actively took part in the formation of the new Bulgarian nation and culture, and the most famous Rila monk during the Renaissance Neofit of Rila is a direct contractor of the project for modern (secular) school. The monastery itself was a national cultural and educational center with a comprehensive and all-round impact on the spiritual life until the liberation of the Bulgarians.

*Educational ideas of the Rila writers during the Bulgarian National Revival (XVIII-XIX c.)*

In the XVIII century the development of Bulgarian literature reached one of its peaks. Ideas, embodied in it since the Middle Ages – democracy, the use of living vernacular, interest in some aspects of life of the people, an indication of the need for education<sup>12</sup> – got typical of the era meaning and significance, connecting more and more with the fight for spiritual and political liberation of the Bulgarian people.

Influenced by spiritual and cultural boom that gripped during the XVIII and early XIX centuries neighboring Balkan nations Bulgarian writers from this period sought to directly change the social reality of the word – both orally and in written. According to them mass secular education in the mother tongue is the road that will bring the Bulgarians from their bondage and will provide material and spiritual well-being like the European nations. Figures of the Bulgarian National Revival (Parteniy Pavlovich, Joseph Bradati, Paisiy Hilendarski, Sofroniy of Vrachanski, Hieromonk Spiridon, priest Todor of Vratsa, priest Puncho, Hadji Agapiy, Neofit Bozveli etc.) showed live attitude towards reality and the causes of the dire situation of the Bulgarians and other Balkan nations.

The idea of Pan-Balkan unity that excited the most remarkable minds of the South Slavic during the early XV century, is the result of understanding the reasons that led to the Ottoman conquest of the Balkans in disunity, internal strife and mutual rivalries between the Balkan Christian nations. A passionate supporter of this idea in the XVIII century is Parteniy Pavlovich. A graduate of the most famous European cultural and educational centers in their spiritual development at the time, he was also influenced by the Rila Monastery, where he had gone twice<sup>13</sup>. Activity of Parteniy Pavlovich has mostly Slavic and Christian

<sup>12</sup> P. Dinekov, *Dvizhenieto na ideite v balgarskata literatura prez vtorata polovina na XVIII vek* [The circulation of ideas in Bulgarian literature in the second half of the XVIII century], in Id., *Literaturni vaprosi* [Literary Issues], Sofia, Izdatelstvo “Narodna kultura”, 1963, pp. 121-134.

<sup>13</sup> Data for visiting of Parteniy Pavlovich in the Rila Monastery: Y. Ivanov, *Starobalgarski razkazi* [Old Stories], Sofia, Pridvorna Pechatnitsa, 1935, pp. 82-86; P. Dinekov, *Parvi vazrozhdentsi*, Sofia, Izdatelstvo “Chemus”, 1942, pp. 51-52; Sprostranov, *Opis na rakopisite*

orientation, which is characteristic of cultural figures of the early Bulgarian National Revival. Solving national problems they put in connection, sometimes depending on the idea of Slavic unity and interaction. Parteniy Pavlovic hopes that the positive example of Serbs, among who he had worked for more than 40 years, would encourage the Bulgarians and their religious and educational benefits would be to the benefit of his people. With love and pain he talked about his Orthodox people suffered because of Turks and Catholics, and sought the support of the united Russian people, whom he admired<sup>14</sup>. Defending Eastern Orthodoxy, he mourned for the separation of the Church of East and West that became the reason for such enmity between Christians. New heretical movements split Christianity even more. All of his activities Parteniy Pavlovich directed to restoring unity among Christians and saw it in the accession of other Christian nations of Eastern Orthodox Christianity, headed by the Patriarchate of Constantinople and politically supported by the powerful Russian state. To him Christian unity was a prerequisite for understanding between nations.

The idea of the bringing closer the oppressed Christian peoples of the Balkans and Slavic unity is rooted in the specific socio-political conditions of the peninsula at that time and should be considered only as a result of progressive ideological and cultural movement that overtook Europe in the XVIII century<sup>15</sup>. It was the result of looking at reality and awareness of the need for changes. The comparison with a more advanced world and benchmarking with a highly developed culture was a sad statement that had a stimulating effect on the figures of the Bulgarian National Revival, but the motives for public benefit activities were primarily within the Bulgarian reality. Flaming patriotism Bulgarians observed in the face of elevated representatives of neighboring Balkan nations, especially Greece and Serbia had positive influence too.

Many other Renaissance figures related to the Rila Monastery and having the opportunity to get acquainted with the achievements of more advanced culturally nations gave their strength for education of the Bulgarian people – Yosif Bradati, Paisiy Hilendarski, Hieromonk Spiridon, Paisiy Rilski, Hristaki Pavlovich and others. Their work is based on a clearly motivated goal: to help by teaching spiritual awakening and raising of the Bulgarian nation.

In this regard major role in the XVIII century fell on damaskin literature<sup>16</sup>. Damascenes are collections of mixed religious and enlightening content that

*v bibliotekata pri Rilskia manastir*, cit., p. 93; Raykov, Kodov, Hristova, *Slavyanski rakopisi v Rilskia manastir*, cit., p. 46 and others.

<sup>14</sup> B.St. Angelov, *Savremennitsi na Paisiy* [Contemporaries of Paisiy], 2 voll., Sofia, Balgarska akademija na naukite, Vol. II, 1964, pp. 20-22, 47-57.

<sup>15</sup> See opinion of Angelov, *Savremennitsi na Paisiy*, cit., Vol. II, p. 182.

<sup>16</sup> Named after the Greek writer from the XVI century Damaskenos Studites. With a translation of his collection *Thesaurus* (Venice, 1558), written in Greek language was marked the beginning of damaskin literature in Bulgaria. There was an assumption that one of the two earliest translation of the end of the XVI century was made in the Rila monastery than the printed edition of the *Thesaurus* and the manuscript collection. The translator was very educated and

were distributed in Bulgaria from the end of the XVI century to the beginning of the XIX century. Their distinctive feature is the language understandable to the average reader and the accessibility of the content. That made damascenes favorite reading for Bulgarians for nearly two centuries and a half, and was the reason for their wide dissemination. The most prominent representative of damascene literature in Bulgaria is the Rila *taxidiote*, teacher and enlightener Joseph Bearded<sup>17</sup>. The third, new translation of the work of Damaskenos Studites *Thesauros* (1558) made by him was the basis for numerous transcripts that formed the so called «Rila circle» of damaskin literature<sup>18</sup>. In his collections he proved himself not only as a mere copyist and compiler, but also as a person trying to express his own personal beliefs and attitudes<sup>19</sup>. As a popular enlightener Joseph Bearded was guided by the idea to enlighten his people – in the spirit of religious morality – via accessible to him instructive literature. That's why he did not get tired of translating from Greek to Bulgarian and from Old Church Slavonic to spoken Bulgarian language.

The main idea of Damaskenos Studites about the purpose of the book, expressed aphoristically in the early preface of the *Thesauros* («When the garden is locked and the source sealed, what's the point?») <sup>20</sup> was shared by Bulgarian damasceners. What was written had to be comprehensive even to the most illiterate people so the speech could reach the mind and heart of the common man. Overcoming ignorance through education was essential for national awareness, thus requiring books written in simple language and lecturings accessible to the people.

Joseph Bearded attached great importance to education for the spiritual awakening of people, so the requirements that he put to the teacher were high. By teacher he meant not only the one that taught children to read and write, but also the priest who educated by oral preaching and instructed his congregation and his influence not only through words but also with deeds. So Joseph Bearded paid particular attention to the morals of the teacher, harmony between words and deeds and his personal example.

was able to truthfully and accurately express Damaskenos's thoughts, language and style. That translation was widespread in the Bulgarian lands, and in the XVII century it became the basis for the emergence of many new Bulgarian damaskins (see D. Petkanova-Toteva, *Damaskinite v balgarskata literatura* [Damaskins in Bulgarian literature], Sofia, Izdatelstvo na Balgarskata akademiya na naukite, 1965, pp. 6-62).

<sup>17</sup> For him see: D. Marinov, *Hieromonk Joseph Bradati*, «Sbornik za narodni umotvorenia, nauka i knizhnina», vol. 1, 1901, pp. 99-131; Angelov, *Savremennitsi na Paisiy*, cit., Vol. I, 1963, pp. 23-85 and references cited there; Petkanova-Toteva, *Damaskinite v balgarskata literatura*, cit., pp. 134-169.

<sup>18</sup> B. Tsonev, *Istoria na balgarskiy ezik* [History of the Bulgarian language], Sofia, Izd. na Sofiyskia universitet, Vol. 1, 1919, c. 282. See. B. Gatsov, *Damaskinari ot rilskata shkola* [Damaskinari of Rila School], «Duhovna kultura», n. 51/52, 1933, pp. 245-252.

<sup>19</sup> B. Penev, *Istoria na novata balgarska literatura* [A History of the Modern Bulgarian Literature], Sofia, Izdatelstvo «Balgarski pisatel», Vol. I, 1976, pp. 456-463.

<sup>20</sup> Petkanova-Toteva, *Damaskinite v balgarskata literatura*, cit., p. 16.

Direction of upbringing and education, supported by scholars in the XVIII century was religious and associated more with the Middle Ages than with the Modern era, but in this case more important was the assessment of the usefulness of knowledge and books. This very important idea of Bulgarian education at all stages of historical development had its important place and importance related to the formation, preservation and revival of the Bulgarians and their etnical consciousness. «Know your origin and language!» – a call for national self-awareness from Paisiy Hilendarski (Slavic-Bulgarian history, 1762) associated with the idea of rejection of foreign spiritual and political bondage. Historical knowledge, according to Paisiy and his disciples, would help to build greater national self-confidence and a desire to reach out to contemporary cultural, political and economic level of free peoples. Historical knowledge had important educational importance. It helped the formation of a new morality, where patriotism was particularly important personal quality with proactive nature. In the eighteenth century monk Daniil wrote *The Life of St. Ivan Rilski*, the basis of which was *Life of St. Ivan Rilski* by Patriarch Evtimiy. This biography, meant to be read in the church of the monastery, was written with a purpose – to influence the patriotic feelings of the audience. In the personality of the author of the biography reflected the educational and instructive result of the activity of Rila literary and educational school in the XV-XVII century. It's the creative environment that has preserved not only the Old Bulgarian, Slavic and Christian traditions that formed the basis of the new Bulgarian culture during the Renaissance but also actively facilitated the establishment of cultural relations between the Bulgarian and other Balkan and Slavic peoples.

During the *Bulgarian National Revival* the monastery became a national unity center for Bulgarians from the three main geographical areas – Moesia, Thrace and Macedonia. That was helped by its natural location in the heart of the Balkan Peninsula and the role of a keeper of Bulgarian cultural traditions over the centuries. Of no less importance is the religious cult of the patron of the monastery who turned during early medieval into a Slavic and Pan-Balkan saint. On the basis of that cult during the period of Ottoman rule Rila Monastery was a mediator in the cultural communication between the Balkan Orthodox peoples and their convergence factor. The monastery regularly organized embassies in Russia and maintained relations with the Athos monasteries and neighboring Balkan countries. Its role as a cultural unifying factor for the Slavs was assessed as early as the nineteenth century by the historian from the Russian Orthodox Church A.N. Muravyov who called it «the great monastery of Slavic people»<sup>21</sup>.

In the nineteenth century the Rila Monastery increasingly assumed the role of unifier of all Bulgarians, irrespective of their social background and

<sup>21</sup> A.N. Muravyov, *Snoshenia Rossii s Vostokom po delam tserkovnym* [Russia's relations with the East for the church], Sankt-Peterburg, Vol. II. 1860, p. 60.

geographical location and became a symbol of resurgent Bulgarian nation<sup>22</sup>. This could be seen particularly clearly after the devastating fire broke out in the monastery in the early dawn of January 13, 1833 and turned in a very short time a large part of the property and all the wooden parts into ashes. Only the church and the fortress tower built of stone left. This dramatic for the fraternity event described figuratively in Kondika monastery, triggered a nationwide support and resources to build the monastery even more beautiful and impressive than before – as it is today. According to Konstantin Irechek who visited it for the first time in 1880, it is the largest and most beautiful architectural complex in the Bulgarian lands and in the northern part of the Balkan Peninsula<sup>23</sup>.

In concept and execution it was the most spectacular Bulgarian construction of its time. It was created by master-builders, stonemasons, woodcarvers, icon-painters and other painters from all over Bulgarian lands. This monumental monument of Bulgarian spirit and culture is the work of the entire Bulgarian nation. Bulgarian villages and towns contributed to the work, and among the names of the donors are not only the prelates and members of the monastic brotherhood of wealthy landlords, artisans and merchants, but also of ordinary pilgrims from all over the Bulgarian lands. Images of some of the donors were depicted on the walls of the monastery church and chapels along with the saints, and this is seen as an expression of national consciousness and self-esteem. The monastery became the focal point of the Bulgarian spirit and culture and image of Bulgaria all over the world. It was visited by ordinary Bulgarians from all over the country, by groups of pilgrims from neighboring Balkan countries, scientists and explorers. Each of them is carried with them the image of this place of Bulgaria, where he felt at home<sup>24</sup>. Because of what he saw there and talking to Rila monks eminent Russian scientist and explorer V.I. Grigorovich<sup>25</sup> began to respect the undeservedly forgotten Bulgarian people and then promoted them

<sup>22</sup> R. Kamburova-Radkova, *Rilskiyat manastir prez Vazrazhdaneto* [Rila monastery during the Renaissance], Sofia, Izdatelstvo “Nauka i izkustvo”, 1972.

<sup>23</sup> K. Irechek, *Patuvania po Bulgaria* [Travel in Bulgaria], Sofia, Izdatelstvo “Nauka i izkustvo”, 1974, p. 693.

<sup>24</sup> This is especially marked and convincing than the national poet Ivan Vazov, who had his own room in the monastery, «I’m home, I’m in my peace – I’m in the heart of Rila» (Iv. Vazov, *Sachinenia v chetiri toma* [Works in four volumes]. Vol. 1: *Stihotvorenia* [Poems], Sofia, Izdatelstvo “Balgarski pisatel”, 1970, pp. 264-265). A number of villages in the Bulgarian lands had their own rooms too and were among the richest donors that helped to resume the monastery after the fire of 1833. There stayed pilgrimage groups from these villages who came there on major Christian holidays and really felt at home among interior trim items entirely relevant Bulgarian ends.

<sup>25</sup> See: V.I. Grigorovich, *Ocherk puteshestvia po Evropeyskoy Turtzii* [Essay travel on European Turkey], Moskva, Tip. M. N. Lavrova, 1877, p. 131; Id., *Plan puteshestvia po slavyanskim zemlyam*, Varshava [Plan journey through Slavic lands], V. tip. M. Zemkevicha, 1883, p. 4; *Donesenia V.I. Grigorovicha ob ego puteshestvii po slavyanskim zemlyam* [Reports by V.I. Grigorovich on his trip to the Slavic lands], Kazan, Izd., Otd-niia russkago iazyka i slovesnosti Imp. Akademii Nauk, 1915, pp. 24, 33.

to the Russian scientific and public circles, and directed the eyes and attention not only to the Rila Monastery but to Bulgarian problems at all.

The major Christian holidays in the Rila Monastery were attended by large groups of pilgrims from all parts of the Balkan Peninsula, usually led by Rila clergymen – *taxidiote*. Unlike Jerusalem and Mount Athos, who were too far away and not everyone could go, the Rila Monastery was accessible to the poorest social strata. Before making their prayer to the saint worshipers did it their bodies and souls, often travelling days and weeks with uncertainty and hardship, overcome by faith filled with anticipation and hope. Hardly can our contemporary people imagine the feelings of a Christian believer, who after a long and tiring journey by ox-cart, horse or donkey, found their way to that place, got in touch with the holy relics, saw materialized everything which was related to Bulgarian affiliation. This undoubtedly brought a sense of unity and pride that they were part of this nation that built up with its own labor and money the most beautiful building ever seen. They could see with their own eyes the royal decree of King Shishman (1378) and to be sure that Bulgaria had once been a free country with its own king, they could read ancient manuscripts in their own language and write their names on them, feel ancient roots on a purely Bulgarian territory, to stash forever in their hearts a memory that would be shared with friends and relatives. By means of material and spiritual culture centered here, the monastery had a comprehensive impact on anyone who came up with pious feelings – religious, moral, educational, cultural, aesthetic. The feeling of peace and harmony was a result of the unique combination of natural beauty, impressive architecture, bright paintings and service of worship.

### *Conclusions*

Many of Rila monks never left the Bulgarian lands, and some even the monastery. But attracted to the fame of the largest Bulgarian monastery and the stored within literary treasures scholars travelers from Russia, Serbia, Germany, France and England came. They came here as bearers of a higher culture that Rila monks came into contact with. Regardless of their education, national and religious affiliation, each of these guests of the monastery found their spiritual territory there. The monastery is a piece of the Balkans, where Europeans began to feel like home. Here's how Ami Bue<sup>26</sup> saw and felt the atmosphere in the monastery in the 1830s:

<sup>26</sup> Ami Boué (1794-1881) on the recommendation and with the assistance of the French government made three consecutive trips around the Balkans (1836, 1837 and 1838) for his research. In 1836 he visited the Rila Monastery.



As we passed through the huge gate of the monastery, we were all amazed by the yard, surrounded by a large stone building on three levels – really great for the country and what cannot be seen in all of Turkey, except perhaps in Mount Athos. A transition so sudden from one country clearly below the level of European civilization into one center, which was mentally carrying us in our country seemed like magic to us and made us think about the actual benefit that the monasteries had ever been in Europe for the development of arts, science and civilization in general<sup>27</sup>.

In may 2002 head of the Roman-Catholic church visited Bulgaria for the first time ever in Bulgarian history. In deference to the Orthodox faith, the Holy Father bowed before the relics of St. Ivan Rilski. «What would Bulgaria be without the Rila Monastery, which has preserved the flame of faith burning even in the darkest moments of your national history?»<sup>28</sup> – asked rhetorically Pope John Paul II. Overcome the vicissitudes of time, the Rila Monastery and is now a focal point of the Bulgarian spirit, a bridge between eras, generations and cultures. Because «the walls erected by the people do not reach God»<sup>29</sup>.

<sup>27</sup> *Frenski patepisi za Balkanite XIX v.*, edited by Bistra A. Tsvetkova, Sofia, Nauka i Izkustvo, 1981, p. 398 (vol. 4 of the journal «Chuzhdi patepisi za Balkanite»).

<sup>28</sup> *Apostolic journey of His Holiness Pope John Paul II in Azerbaijan and Bulgaria*. Words of the Holy Father. Pilgrimage in the Holy Rila Monastery (Rila Monastery, Saturday 25<sup>th</sup> May 2002).

<sup>29</sup> Welcoming words of the abbot of the Rila Monastery bishop John (Rila Monastery, Saturday 25<sup>th</sup> May 2002).



# Los maestros ortógrafos en el Siglo de Oro Español\*

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## *Orthographers teachers in the Spanish Siglo de Oro*

**ABSTRACT:** The figure of Schoolteachers that published arts of orthography and readers during the Spanish Golden Age are analysed in this paper, in the context of the debate on the reform of phonetic writing. Very meaningful proposals are deducted from the examination of their work, such as the great importance of first letters notebooks in children literacy, the relevance of the training and professionalization of schoolteachers, the proposal for an early pre-school education with specialized teachers or, even more important, the implementation of the syllabic method of teaching to read and write at the same time. These teachers were undoubtedly ahead of their time, they were very innovative in their century and give us a testimony about how literacy processes were conceived in primary schools.

**EET/TEE KEYWORDS:** Spelling; Literacy; Language Teaching; Primary education; Spain; XVI-XVII<sup>th</sup> Centuries.

## *Introducción*

La polémica entre ortógrafos fonéticos, que pretendían una reforma radical de la escritura de nuestra lengua según el principio del «escribo como hablo» consagrado por Quintiliano, y los defensores de la escritura tradicional basada en

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la autoridad de impresores, secretarios y maestros calígrafos<sup>1</sup>, que mantenía en muchos casos una norma latinizante, se ocupó muy pronto de las implicaciones que la norma de escritura tenía en los procesos de alfabetización propios de las escuelas de primeras letras y otros ámbitos; sin embargo, las ideas pedagógicas en las ortografías españolas del Siglo de Oro es un ámbito poco estudiado<sup>2</sup>.

Mateo Alemán, el autor del *Guzmán de Alfarache*, es sin duda el ejemplo más importante del pensamiento educativo que se recoge en las artes de ortografía españolas del Siglo de Oro como argumento en defensa de la ortografía fonética<sup>3</sup>; anticipó propuestas tan innovadoras como el aprendizaje conjunto de la lectoescritura, la simplificación de la caligrafía en las escuelas de primeras letras o la adecuación del método de alfabetización a la edad de los niños. La ortografía fonética fracasó definitivamente en nuestra lengua con los excesos reformistas de Gonzalo Correas<sup>4</sup>, aunque sus reformas del alfabeto y del nombre de las letras muestran una profunda preocupación por el aprendizaje de los niños. Los detractores de las novedades ortográficas también utilizaron argumentos pedagógicos para defender la tradición etimológica en nuestra escritura<sup>5</sup>. Otros autores, como Juan López de Velasco en el siglo XVI, escriben artes de ortografía que merecen un destacadísimo lugar en la historia de las ideas pedagógicas que se han ocupado de los procesos de alfabetización en España, pero aún no han sido objeto de análisis desde esta perspectiva.

<sup>1</sup> Para una descripción detallada de esta polémica, véanse: J. Martínez, *La evolución de la ortografía española: de la ortografía 'de las letras' a la ortografía 'de los signos de la escritura'*, en M. Ariza (ed.), *Actas del II Congreso Internacional de Historia de la Lengua Española*, Madrid, Pabellón de España, 1992, pp. 753-761; J. Bustos, *Las propuestas ortográficas de Gonzalo Correas*, «Dicenda. Cuadernos de Filología Hispánica», n. 16, 1998, pp. 41-62; A. Esteve, *Contribución al estudio de las ideas ortográficas en España*, «Tonos. Revista electrónica de estudios filológicos», n. 13, 2007, <[http://www.um.es/tonosdigital/znum13/secciones/relecturas\\_A\\_ideas.htm](http://www.um.es/tonosdigital/znum13/secciones/relecturas_A_ideas.htm)> (último acceso: 12 de Marzo de 2015); y M.J. Martínez, *La fijación ortográfica del español: norma y argumento historiográfico*, Frakfurt, Peter Lang, 2010.

<sup>2</sup> Este estudio tiene como antecedentes en la investigación sobre las ideas pedagógicas en las ortografías españolas del Siglo de Oro A. Gómez Camacho, *Las ideas pedagógicas en la Ortografía castellana de Mateo Alemán*, «Revista española de pedagogía», n. 257, 2014, pp. 159-173; *Escribo como hablo. Las ideas pedagógicas de Gonzalo Correas*, «Bordón. Revista de Pedagogía», vol. 4, n. 66, 2004, pp. 55-67.

<sup>3</sup> Para más información sobre la relación de Mateo Alemán con la educación, además del estudio citado en la nota anterior, véanse: M. Cavillac, *Mateo Alemán et la modernité: l'Ortografía castellana (1609)*, «Bulletin Hispanique», n. 82, 1980, pp. 380-401. M.D. Johnston, *Mateo Aleman's Voyage to a New World: The Ortografía castellana of 1609*, «Dispositio», n. 8, 1983, pp. 87-100; M.D. Johnston, *Mateo Alemán's Problem with Spelling*, «Publications of the Modern Language Association of America», n. 103, 1988, pp. 759-769.

<sup>4</sup> Sobre la reforma radicalmente fonética de la ortografía de Gonzalo Correas, véase: S. Galán, *Ideas ortográficas en Gonzalo Correas*, en M. Ariza (ed.), *Actas del II Congreso Internacional de Historia de la Lengua Española*, Madrid, Pabellón de España, 1992, pp. 265-272.

<sup>5</sup> Un panorama general sobre las ideas pedagógicas que se utilizaron como argumento en la polémica ortográfica del Siglo de Oro español puede encontrarse en A. Gómez Camacho, *Pedagogical ideas in Spanish Golden Age Orthography*, «Procedia», n. 178, 2015, pp. 128-131; *Las ideas pedagógicas en las ortografías del Siglo de Oro*, Sevilla, Diputación de Sevilla, 2015.

Una circunstancia histórica favoreció inesperadamente la incorporación de los maestros que pretendían publicar sus reflexiones sobre la alfabetización de los niños a la polémica ortográfica: en 1583, el rey Felipe II concede un privilegio para la impresión de las cartillas de primeras letras al cabildo de la catedral de Valladolid, con el objeto de financiar la construcción del templo<sup>6</sup>. Las cartillas eran el vehículo natural para la innovación educativa en la enseñanza de la lectura (la cartilla de Juan de Robles que se analiza a continuación es un ejemplo muy significativo), pero los intereses económicos de los canónigos vallisoletano favorecieron la perpetuación de un modelo de cartilla de primeras letras anquilosado e ineficaz<sup>7</sup>. Sin duda este monopolio favoreció desde finales del siglo XVI que muchos maestros participasen en la polémica ortográfica con obras misceláneas que sumaban contenidos de las cartillas de primeras letras, preceptos ortográficos, orientaciones para los alumnos y consejos para los maestros que enseñaban a leer y a escribir.

Poco tienen que ver estas artes con los opúsculos de unas pocas hojas (apenas un abecedario, un silabario y unos textos religiosos en español y en latín) de los que se imprimieron decenas de millones solo en el siglo XVII con la aprobación del cabildo catedralicio de la capital castellana<sup>8</sup>. Algunas ortografías españolas, y muy singularmente las que escribieron los maestros de primeras letras, incorporarán a partir de López de Velasco contenidos propios de las cartillas entendidas como obras educativas según el modelo que consagra el canónigo Robles. A fin de cuentas, la polémica ortográfica se ocupaba tanto de la escritura correcta de nuestra lengua como de la pronunciación ortológica que la escritura representaba; la enseñanza de la lectura (en voz alta y a coro) sobre abecedarios y silabarios estaba inevitablemente relacionada con las letras que se escribían<sup>9</sup>.

<sup>6</sup> Este privilegio se analiza en detalle en: M.I. González del Campo, *Cartillas de la doctrina cristiana, impresas por la catedral de Valladolid y enviadas América desde 1583*, en J. Saranyana (ed.), *X Simposio Internacional de Teología de la Universidad de Navarra*, Pamplona, Ediciones Universidad de Navarra, 1990, Vol. I, pp. 181-193; L. Resines, *La cátedra de papel. Historia de las cartillas de Valladolid*, Valladolid, Diputación Provincial de Valladolid, 2007.

<sup>7</sup> Para más información sobre la evolución de las cartillas españolas, véanse: A.M. Chartier, *La enseñanza de la lectura: un enfoque histórico*, en L. Martínez (ed.), *La infancia y la cultura escrita*, México, Siglo XXI, 2001, pp. 147-190; V. Infantes, *De las primeras letras. Cartillas españolas para enseñar a leer de los siglos XV y XVI*, Salamanca, Ediciones de la Universidad de Salamanca, 1998, pp. 130-169; V. Infantes, *La educación impresa*, «Cuadernos de Historia Moderna», n. 3, 2004, pp. 227-251; V. Infantes, A. Martínez, *De las primeras letras. Cartillas españolas para enseñar a leer del siglo XVII*, Salamanca, Ediciones Universidad de Salamanca, 2003, Vol. I, pp. 65-106.

<sup>8</sup> Cfr. A. Viñao, *Aprender a leer en el Antiguo Régimen: cartillas, silabarios y catones*, en A. Escolano, *Historia ilustrada del libro escolar en España. Del Antiguo Régimen a la Segunda República*, Madrid, Fundación Germán Sánchez Ruipérez, 1997, pp. 149-191.

<sup>9</sup> Sobre la evolución de las prácticas de alfabetización, véanse: I.M. Ríos, *Historia de un aprendizaje: la lectoescritura*, en P. Morote (ed.), *Homenaje a Eusebio Aranda*, Valencia, Universidad de Valencia, 1991, pp. 323-328; F. Gimeno, *Aprender a escribir en el Antiguo Régimen*, en A. Escolano (ed.), *Historia ilustrada del libro escolar en España. Del Antiguo Régimen a la Segunda República*, Madrid, Fundación Germán Sánchez Ruipérez, 1997, pp. 291-314; A. Viñao,

Las artes escritas por maestros de primeras letras, los maestros ortógrafos, ocuparon el lugar que las cartillas de primeras letras dejaron vacante como vía de expresión de las propuestas de innovación educativa.

Cierto es que estos maestros probablemente fueron ortógrafos circunstanciales que buscaban un mecanismo que les permitiese sortear el privilegio real<sup>10</sup>; pero la interminable polémica entre los defensores de las novedades ortográficas en nuestra lengua y sus detractores (empeñados en conservar una ortografía latinizante que en modo alguno reproducía la realidad de la lengua en los siglos XVI y XVII) era el caldo de cultivo ideal para que se cuestionase también un método de alfabetización anticuado para el nuevo idioma que estaba surgiendo. Se favorece así la crítica de una metodología mecánica y memorística que se basaba en la repetición en voz alta y en la copia<sup>11</sup>, y la censura de una organización de las escuelas de primeras letras que dejaba la alfabetización en manos de estudiantes aventajados, sacristanes y maestros muy poco cualificados<sup>12</sup>.

El propósito de este estudio es investigar las ideas educativas de los maestros de primeras letras que participaron en la polémica ortográfica del Siglo de Oro español; en concreto se pretende determinar si se caracterizaron por el uso de argumentos pedagógicos y referencias a la alfabetización en sus ortografías.

Se parte de la hipótesis de que su condición de maestros propició un punto de vista singular tanto en sus propuestas para el aprendizaje de la lectura y la escritura como en la crítica de la práctica docente de la época, frente a otros ortógrafos que utilizaron el argumento pedagógico en la polémica ortográfica del Siglo de Oro sin relación alguna con las escuelas de primeras letras.

Desde el punto de vista metodológico, se sigue el modelo clásico de la investigación histórico-pedagógica<sup>13</sup>. En una primera etapa de carácter

*Alfabetización y primeras letras (siglos XVI-XVII)*, en A. Castillo (ed.), *Escribir y leer en el siglo de Cervantes*, Madrid, Gedisa, 1999, pp. 39-84; A. Viñao, *Towards a Typology of the Primers for Learning to Read (Spain, c. 1496-1825)*, «Paedagogica Historica», n. 38, 2002, pp. 73-90.

<sup>10</sup> Cfr. Gómez Camacho, *Las ideas pedagógicas en las ortografías sevillanas del Siglo de Oro*, cit.

<sup>11</sup> Para más información sobre las críticas a los métodos de lectoescritura en el Siglo de Oro, véanse: J. Ruiz, *La enseñanza de la lectura de la Ilustración al liberalismo*, en A. Escolano (ed.), *Historia ilustrada del libro escolar en España. Del Antiguo Régimen a la Segunda República*, Madrid, Fundación Germán Sánchez Ruipérez, 1997, pp. 193-227; J. Ruiz, *El oficio de maestro en tiempos de Cervantes*, «Revista de educación», n. ext. 1, 2004, pp. 11-26; P. Rueda, *Aprender a leer: la enseñanza de las primeras letras en el mundo moderno*, «Andalucía en la historia», n. 27, 2010, pp. 88-91.

<sup>12</sup> Sobre el papel de los maestros de primeras letras en la alfabetización durante el Siglo de Oro español, véanse: B. Bartolomé, *Las escuelas de primeras letras*, en Id. (edd.), *Historia de la acción educadora de la Iglesia en España. Edades Antiguas, Media y Moderna*, Madrid, Biblioteca de Autores Cristianos, 1996, pp. 612-630; J.M. Lope, *La enseñanza del español durante el Siglo de Oro*, en M. Fernández, F. García, N. Vázquez (edd.), *Actas del I Congreso Internacional de Historiografía Lingüística Española*, Madrid, Arco Libros, 1997, pp. 49-74.

<sup>13</sup> Sobre las diferentes tendencias metodológicas en la historiografía educativa en España, véanse: A. Escolano Benito, *La historiografía educativa: tendencias generales*, en A. Viñao, N. de Gabriel (coords.), *La investigación histórico-educativa: tendencias actuales*, Barcelona, Ronsel, 1997, pp. 51-84; J. Ruiz, *El método histórico en la investigación histórico-educativa*, en Viñao,

heurístico se revisaron como fuentes primarias todas las ortografías españolas de los siglos XVI y XVII disponibles en la Biblioteca Digital Hispánica de la Biblioteca Nacional de España; es decir, todo el corpus de la polémica ortográfica del español clásico que supera el medio centenar de autores según la nómina de Esteve Serrano<sup>14</sup>. En una segunda fase, se seleccionaron dieciséis ortografías que aportaban información sobre la escolarización en las escuelas de primeras letras y los procesos de alfabetización: las obras de Elio Antonio de Nebrija, Alejo Vanegas, Juan de Iciar, Juan de Robles, Juan López de Velasco, Juan de la Cuesta y Pedro Simón Abril, en el siglo XVI, y Francisco Pérez de Nájera, Mateo Alemán, Bartolomé Jiménez Patón, Miguel Sebastián, Juan Pablo Bonet, Cristóbal de Morales, Gonzalo Correas, Juan de Robles, José de Casanovas y Diego Bueno, en el siglo XVII.

Para este estudio se utilizaron las cinco artes cuyos autores se reconocían como maestros de primeras letras o que recogían esta condición en las portadas, licencias y aprobaciones. Por último, se analizaron en sus textos las ideas pedagógicas más relevantes de todos los maestros ortógrafos con la excepción de Pedro Simón Abril y su *Instrucción para enseñar a los niños fácilmente el leer y el escribir* (1590); una obra que, a pesar de su sugerente título, apenas esboza algunas referencias superficiales al mundo de la escuela de primeras letras.

### 1. *Las cartillas que no pudieron ser*

En los primeros años del reinado de Felipe II, Juan de Robles, canónigo de Santa María del Mercado en Berlanga, publica la *Cartilla menor para enseñar a leer en romance* (1564); la obra es anterior por tanto al privilegio del cabildo catedralicio de Valladolid. La estructura de la cartilla marca el modelo de lo que serán las ortografías de los maestros ortógrafos durante más de un siglo y se divide en varias partes claramente diferenciadas: un prólogo a «los maestros que enseñan a leer», una cartilla de primeras letras, una ortografía y consejos para que los maestros de primeras letras enseñen a los niños con eficacia. El canónigo Robles describe en su cartilla el método alfabético tradicional en el capítulo dedicado a «La forma que se ha de tener para enseñar a leer»; se parte de la memorización del alfabeto aprendiendo el nombre de las letras, recitadas en voz alta y a coro, para luego continuar con los silabarios con los que se formarán palabras.

de Gabriel, (coords.), *La investigación histórico educativa: tendencias actuales*, cit., pp. 131-202; E. Redondo, *Introducción a la Historia de la educación en España y América: la Historia de la educación, cuestiones conceptuales y metodológicas*, en B. Delgado (ed.), *Historia de la educación en España y América*, Madrid, Morata/ Fundación Santa María, 1992, Vol. 1, pp. 19-57.

<sup>14</sup> Cfr. A. Esteve Serrano, *Estudios de teoría ortográfica del español*, Murcia, Universidad de Murcia, 1992, pp. 128-163.

Lo primero es que conozca bien cada letra de la lección, nombrando cada una de por sí [...], luego dé otra buelta, haziendo syllabas, nombrando cada letra de por sí, y después juntándolas en el sonido que hazen por syllabas [...]. Lo tercero diga syllabas sin nombrar las letras [...]. Lo quarto diga las diciones distintamente<sup>15</sup>.

Al abecedario y al silabario, el canónigo Robles añade orientaciones metodológicas para que los maestros utilicen correctamente su cartilla en las escuelas de primeras letras. El planteamiento es revolucionario a mediados del siglo XVI<sup>16</sup> y muestra claramente la profesionalización del oficio de maestro y la importancia social que se concedía a la alfabetización de los niños en estos años: la cartilla de Robles está dirigida tanto a los maestros como a los niños que acceden a la lectura y contrasta con las cartillas españolas del XVII que apenas fueron unos efímeros opúsculos impresos en cuarto u octavo a partir de un pliego de imprenta.

Y viendo que por falta de cartilla, que no tiene a lo menos lo que en esta se contiene, remiten los maestros a sus discípulos a que aprendan por discurso de tiempo lo que lo que luego se les avía de enseñar, y así quieren hazerles correr antes que sepan andar. Alguno pensará que seguir esta forma de enseñar a leer que es rodeo porque se han de detener algo en las syllabas y en otros principios necesarios, y por experiencia hallará que se acortan. Veo que por falta no de maestros sino de arte, de veynte que vienen a estudiar grammática apenas uno sabe bien leer ni aun razonablemente<sup>17</sup>.

La importancia excepcional de la obra de Juan de Robles reside en que muestra cómo podrían haber sido las cartillas de primeras letras si su impresión no se hubiese sujetado a la aprobación de los canónigos vallisoletanos, más preocupados por sus beneficios económicos que por los aspectos educativos de estos impresos. El optimismo humanista del Renacimiento y la llegada de una edad de oro se vio truncada en el Seiscientos en España, también en el ámbito educativo; la cartilla de Robles es una obra magnífica en su género que no tuvo su continuación en otras cartillas menores de primeras letras, minuciosamente descritas y editadas por Infantes y Martínez<sup>18</sup>, sino en las artes de los maestros ortógrafos.

<sup>15</sup> J. de Robles, *Cartilla menor para enseñar a leer en romance, especialmente a personas de entendimiento en letra llana, conforme a la propiedad de la lengua*, Alcalá, Andrés de Angulo, 1564, s.f.

<sup>16</sup> Sobre la originalidad de la cartilla de Robles, véase: M. L. Calero, *La Cartilla para enseñar a leer en romance (1564) de Juan Robles*, en P. Cano (ed.), *Actas del Congreso de Lingüística General*, Madrid, Arco Libros, 2007, pp. 2745-2768; B. Bartolomé, *Las escuelas de primeras letras*, en B. Bartolomé (ed.), *Historia de la acción educadora de la Iglesia en España. Edades Antiguas, Media y Moderna*, Madrid, Biblioteca de Autores Cristianos, 1996, pp. 612-630.

<sup>17</sup> Robles, *Cartilla menor para enseñar a leer en romance*, cit., s.f.

<sup>18</sup> Cfr. Infantes, *De las primeras letras. Cartillas españolas para enseñar a leer de los siglos XV y XVI*, cit., p. 94; Infantes, Martínez, *De las primeras letras. Cartillas españolas para enseñar a leer del siglo XVII*, cit., pp. 149.



## 2. *Juan de la Cuesta: el maestro como educador*

El maestro ortógrafo por excelencia del siglo XVI es sin duda Juan de la Cuesta con su *Libro y tratado para enseñar leer y escribir brevemente y con gran facilidad con recta pronunciación y verdadera ortographía todo romance castellano* (1589), que es el fruto de su trabajo como maestro de niños: «Yo lo he visto por experiencia, porque como es muy notorio mi pupilage ha sido siempre tan grande que en esta mi arte ha sido el más copioso del reyno»<sup>19</sup>. La obra inserta dos capítulos dedicados a lo que podríamos denominar, salvando el anacronismo de los términos, la formación del profesorado y la metodología educativa. Al comienzo de la obra se ofrece una «Regla muy provechosa»<sup>20</sup> en la que se analizan las prácticas de alfabetización del siglo XVI, mientras que al final se recoge la «Amonestación y aviso de gran aprovechamiento»<sup>21</sup>, que ofrece a los maestros consejos para la organización de la escuela de primeras letras.

El método de alfabetización que propone Juan de la Cuesta es el característico de la época: «an de començar a deletrear por síllavas y de síllavas hazer diciones o partes, porque en este principio y particularidad está y consiste el quedar los niños muy buenos letores perfetos y seguros»<sup>22</sup>, donde la lectura mecanizada de letras y sílabas sin contenido es previa e independiente de la comprensión lectora y de la escritura<sup>23</sup>. A pesar de esto, insiste en la superación de la lectura mecanizada en voz alta cuando reivindica la comprensión lectora como el objetivo final de la lectura frente al descifrado de letras desprovisto de toda significación; «y principalmente haga y procure que entienda lo que lee (que es gran negocio), y para entender esto puede el que enseña alguna vez preguntar al discípulo que le diga y relate lo que ha leydo, y por la razón que diere verá si ha entendido lo que ha leydo»<sup>24</sup>.

Sin embargo, el pensamiento educativo del ortógrafo de Valdenuño Fernández se caracteriza sobre todo por la reivindicación del maestro de primeras letras como un profesional de la educación que trabaja con niños: la motivación, la adecuación de las lecturas a la edad y el rechazo del castigo físico son tópicos recurrentes en la metodología que propone para la alfabetización.

<sup>19</sup> J. de la Cuesta, *Libro y tratado para enseñar leer y escribir brevemente y con gran facilidad con recta pronunciación y verdadera ortografía todo romance castellano, y de la distinción y diferencia que hay en las letras consonantes de una a otras en su sonido y pronunciación*, Alcalá, Juan Gracián, 1589, f. 58v.

<sup>20</sup> *Ibíd.*, f. 19v.

<sup>21</sup> *Ibíd.*, f. 60v.

<sup>22</sup> *Ibíd.*, f. 21r.

<sup>23</sup> Cfr. notas 9 y 11.

<sup>24</sup> Cuesta, *Libro y tratado para enseñar leer y escribir brevemente*, cit., f. 63v.

Alguno dirá que escribir y tratar estas cosas es niñería o que son niñerías; digo que lo son, pero en las niñerías se han de enseñar los niños. Que por no enseñarles estas niñerías siendo niños, después son hombres en edad y en este caso siempre niños porque ignoran lo que fuera justo que supieran y necesario que se sepa, y aunque son niñerías, si lo leen de buena gana, se hallarán cosas de su gusto y contento<sup>25</sup>.

En una época en que el intrusismo profesional y la falta de escrúpulos de maestros perezosos era la tónica dominante<sup>26</sup>, Cuesta insiste una y otra vez en que el amor a los niños es el secreto de un buen maestro. Sirva de ejemplo este conmovedor pasaje en el que se reprende a los maestros perezosos, y que sigue vigente cinco siglos después.

Y no tenga ninguno excusa si no fuere dezir que no quiere travajar, porque cierto el trabajo es poco para el que tiene gana de travajar y aprovechar a sus niños, si los quiere como a hijos como es razón quererlos. Porque el buen maestro el mismo amor ha de tener a sus discípulos, especialmente siendo pupilos, que, pues comen con el maestro y duermen en su casa, y tratan siempre juntos, justo es que los quiera mucho y los aproveche pues le dan de comer a trueque de su trabajo<sup>27</sup>.

### 3. Miguel Sebastián y la educación infantil

Miguel Sebastián era presbítero y catedrático de retórica de la universidad de Zaragoza cuando publica su *Orthographía y ortología* (1619); aunque el título y la filiación de la portada sugieran otra cosa, la obra de Sebastián es una cartilla miscelánea redactada por un maestro de primeras letras con muchos años de experiencia. El principio de autoridad que avala sus propuestas educativas y sus reflexiones sobre la alfabetización no se sustenta en su cátedra universitaria ni en su carrera eclesiástica, sino en su experiencia como maestro: «continuamos el enseñar con ella a los niños de nuestra aldea treinta o más años continuos»<sup>28</sup>. El título del arte del maestro Sebastián cobra un nuevo sentido para el lector; ortografía y ortología devienen en sinónimos de escribir y leer en el contexto de la escuela de primeras letras.

La característica más llamativa del pensamiento educativo de Sebastián es su interés por la alfabetización temprana; la adquisición de la lengua oral y la ortología forman parte de la alfabetización en una época en la que el reajuste consonántico del español y su fragmentación dialectal hacían de la pronunciación correcta una norma en continuo cambio. En este contexto, los niños aprenden

<sup>25</sup> *Ibid.*, ff. 6v-7r.

<sup>26</sup> Sobre este tema, véase: Ruiz, *El oficio de maestro en tiempos de Cervantes*, cit., p. 16.

<sup>27</sup> *Ibid.*, f. 9r.

<sup>28</sup> M. Sebastián, *Ortografía y ortología*, Zaragoza, Juan Larrumbe, 1619, prólogo, s.f.

a hablar y a leer en voz alta de forma paralela ya desde la primera infancia, por lo que se recurre al juego como metodología de aprendizaje.

quando vieren que su hijo se haze fuerça o muestra ya querer hablar, entonces, sabroseándose con él, póngale por las orejas lo primero solas las vocales, provocándole con halagos, con amorosas caricias, a que las nombre él, a que él las diga y con buena pronunciación. Esto aunque ni mire las letras ni aun la cartilla (...), a los quatro años podrá el niño tomar la cartilla y mirar las letras, ya sabrá nombrarlas bien y pronunciarlas, y hacer sílabas<sup>29</sup>.

El ideario pedagógico del catedrático de retórica se resume en tres conclusiones que cierran su obra a modo de resumen: la necesidad de que existan escuelas de primeras letras municipales (que anunciarían lo que con los siglos será la escuela pública), la necesidad de que los maestros trabajen con libros de calidad, y que haya maestros especializados exclusivamente en la enseñanza de la lectura.

Lo segundo que el que enseña de leer no enseñe de escribir, porque precian mucho el escribir y desestiman el leer. Cansados de corregir materias y faltándoles el tiempo, la lición de leer la hacen dezir a muchos juntos que ni las pueden corregir ni oyr; los hazen correr y aun ellos, los maestros, dizen la lición por acabar antes. De donde se sigue que jamás sabe leer el discípulo, y el daño que vemos en todo el mundo. Porque hazen lo más principal el escribir y desprecian el leer, como si no fuesse necesario para el escribir<sup>30</sup>.

Desde un punto de vista moderno la propuesta puede parecer ineficaz e incluso pintoresca; pero en el contexto del siglo XVII la enseñanza de la lectura era considerada como el nivel inferior y menos prestigioso de la enseñanza, y se encomendaba con frecuencia a sacristanes, alumnos aventajados o aprendices de muy escasa cualificación. Sebastián defiende la labor del profesor de lectura frente a los maestros calígrafos y los maestros de gramática, y reivindica la importancia de la comprensión lectora por encima del descifrado mecánico «no puede saber el que ni lee, ni leyendo entiende los libros»<sup>31</sup>.

En el fondo, lo que está proponiendo Miguel Sebastián cuando reclama la separación entre los maestros que enseñan a leer y los que enseñan a escribir es la profesionalización de lo que hoy entenderíamos como la educación infantil. Aunque al lector moderno se le antoje impensable al repasar los interminables silabarios del maestro aragonés, la obra se escribe para edades muy tempranas, «esta artezilla que la hacemos principalmente para enseñar la cartilla para enseñar de leer y hablar a los muy niños»<sup>32</sup>. En este sentido hay que entender la originalidad del pensamiento educativo del Miguel Sebastián y su insistencia en que sea un maestro especialista el que enseñe a hablar y a leer: tras una primera etapa de prelectura mediante el juego en el entorno familiar hasta los cuatro

<sup>29</sup> *Ibid.*, f. 10v.

<sup>30</sup> *Ibid.*, ff. 68r-68v.

<sup>31</sup> *Ibid.*, f. 28r.

<sup>32</sup> *Ibid.*, prólogo, s.f.

años, se accedería a la lectura con la intervención del maestro especialista a partir de esa edad. Los maestros de primeras letras con frecuencia despreciaban la lectura<sup>33</sup>; pero la expresión oral y la lectura comprensiva son, para Sebastián, competencias previas e imprescindibles que deben adquirirse con la ayuda de maestros de lectura. Si a finales del XVI Juan de la Cuesta se esforzaba en dignificar la infancia y concebía la función del maestro como educador de niños, en los primeros años del siglo XVII Miguel Sebastián reclama la figura del maestro en el entorno de los cuatro años para perfeccionar su expresión oral e introducirlos en la lectura. En ambos casos, la experiencia como maestros de primeras letras y el análisis crítico de la práctica docente de otros maestros les permiten la formulación de propuestas pedagógicas adelantadas a su época.

#### 4. *Cristóbal de Morales y el aprendizaje conjunto de lectoescritura*

El caso de Cristóbal de Morales es ciertamente singular, fue un maestro de primeras letras que murió muy joven y dejó manuscritos los materiales que empleaba para la alfabetización de los niños. Su hermano Juan Bautista de Morales, el célebre impresor cordobés, publica las *Pronunciaciones generales de lenguas, ortografía, escuela de Leer, Escribir y Contar y Sinificacion de Letras en la Mano* (1623) y figura en la portada y en las aprobaciones como autor. El prólogo «al lector» de Juan Bautista ofrece una valiosísima información sobre cómo organizaba el aula de primeras letras y cómo concebía la alfabetización su hermano<sup>34</sup>; el impresor de Montilla se convierte así en una suerte de investigador educativo que a través de los siglos ofrece un testimonio etnográfico y narra con mucha precisión lo que vio en la escuela de su hermano, en el pueblo cordobés de Aguilar de la Frontera durante un periodo indeterminado en los primeros años del XVII.

Cristóbal de Morales fue un maestro muy eficaz que se formó en escuelas de primeras letras de la Compañía de Jesús<sup>35</sup>. Organizaba su aula «para poder

<sup>33</sup> Esta situación se describe en detalle en Viñao, *Alfabetización y primeras letras (siglos XVI-XVII)*, cit., pp. 48-49.

<sup>34</sup> Sobre los hermanos Morales, véase: A. Gascón, *Los tres Morales de Montilla. Juan Bautista de Morales, Cristóbal Bautista de Morales y Juan Bautista de Morales, hijo*, «Cultura sorda», 2010, <[http://www.cultura-sorda.eu/resources/Gascon\\_3-Morales-2010.pdf](http://www.cultura-sorda.eu/resources/Gascon_3-Morales-2010.pdf)> (último acceso: 1 de abril de 2015).

<sup>35</sup> No podemos pasar por alto que Cristóbal de Morales estudió y se inició como maestro en las escuelas de primeras letras de la Compañía de Jesús y parece que su metodología se relacionaba con la pedagogía jesuita: «y que si los estarcidos del P. Pedro Flores de la Compañía de Jesús que en Madrid se imprimen, obra tan ingeniosa, provechosa y única, ubiera llegado entonces a esta tierra, le escusara este trabajo y el de transflorar sus muestras y hacerlas, y procurarles buen papel, pues todo está junto y por extremo bueno en los dichos estarcidos», cit., f. 3r, Juan Bautista de Morales, el impresor de la obra hermano de Cristóbal, se refiere al *Método del Arte de Escribir*,

solo acudir a más de cien discípulos que tenía»<sup>36</sup> y, como era característico en la época, entendía la lectura como un proceso independiente de la escritura, «tenía los niños de leer divididos de los de escribir, aunque todos a su vista»<sup>37</sup>. Partía del aprendizaje del nombre de las letras y para ello se servía de alumnos mayores, «uno de los de escribir (que para este efeto avía muchos enseñados) ya a aquella ora tenía su plana escrita» se encargaba de la lectura a coro de la cartilla, tutelado a su vez por alumnos aventajados «tenía quatro muchachos [...] que corregían a todos los demás las planas por las muestras»<sup>38</sup>. Nos encontramos por tanto ante el método tradicional de enseñanza alfabética de la lectura y de la escritura, se memoriza el abecedario con el nombre de las letras, se repite el proceso con los silabarios para concluir con la lectura mecanizada en voz alta de los textos; la escritura se aborda cuando ya se sabe leer. Es la práctica didáctica de alfabetización que se repite en decenas de ortografías y cartillas españolas.

Sin embargo, el prólogo culmina inesperadamente con un apartado titulado «Modo de enseñar a leer y escribir juntamente» que describe el método de enseñanza conjunta de la lectura y de la escritura que aplicaba solo en algunos casos: «a personas de entendimiento enseñaba a leer y escribir juntamente en breve tiempo en esta forma»<sup>39</sup>. En el aula del maestro Morales se accedía a la lectoescritura con un método silábico moderno: «mostrávas las cinco vocales y, conocidas y sabidas nombrar y hacer, formava dellas dicciones y partes y nombres enteros»<sup>40</sup>; a continuación se aprendían las letras *m* y *r* «y dellas con las vocales solas escrevía dicciones como *María, Roma, mar, morir*, y otras, y sabidas estas iba añadiendo más letras»<sup>41</sup>. Tras la lectura en voz alta, se aprendía la escritura de las palabras que se habían formado con las cinco vocales y dos consonantes; Juan Bautista de Morales certifica la eficacia del método que su hermano aplicaba en el aula dos siglos antes de que los maestros ilustrados lo introdujesen en nuestro país: «y uvo algunos que en quinze días y menos sabían escribir lo que querían y leer lo que escribían»<sup>42</sup>.

En ninguna de las cartillas de primeras letras ni en las ortografías clásicas que hemos revisado aparece un testimonio directo de la utilización en la escuela de

Madrid, Luys Sánchez, 1614. Sobre la relación de Cristóbal de Morales con la Compañía de Jesús, véase: A. Martínez Pereira, *La buena letra de la Compañía. Lecciones de escritura de Pedro Flórez, Santiago Gómez y Lorenzo Ortiz (entre otros)*, en *A Companhia de Jesus na Península Ibérica nos sécs. XVI e XVII: espiritualidade e cultura: actas do colóquio internacional*, Porto, Universidade, 2005, pp. 19-21.

<sup>36</sup> J.B. de Morales, *Pronunciaciones generales de lenguas, ortografía, escuela de leer, escribir y contar y significación de letras en la mano*, Montilla, Juan Bautista de Morales, 1623, f. 2r.

<sup>37</sup> *Ibid.*, f. 4r.

<sup>38</sup> *Ibid.*, f. 3 r-v.

<sup>39</sup> *Ibid.*, f. 5r.

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

<sup>41</sup> *Ibid.*, 5v.

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

primeras letras del método silábico de lectoescritura, ni en estudios anteriores se describe un caso comparable. Otras referencias a la renovación del método, como en el caso de Mateo Alemán, no son más que especulaciones teóricas; en este caso se trata del testimonio directo de un espectador de excepción que narra y describe lo que observó en primera persona en la escuela que el maestro Morales abrió en Aguilar de la Frontera, acaso el mismo método que ya utilizaba en la escuela que tuvo en la sevillana calle de Talabarteros, frente a la puerta del Patio de los Naranjos de la catedral, en los mismos años en los que Mateo Alemán redactaba en la ciudad su *Ortografía castellana*<sup>43</sup>. Es posible que el «Modo de enseñar a leer y escribir juntamente» del maestro Morales se inspirase en el método de enseñar a hablar, leer y escribir a los sordomudos que en esos años puso en práctica el maestro Ramírez de Carrión<sup>44</sup> por encargo del marqués de Priego; pero sin duda el mérito de utilizarlo por primera vez en la escuela de primeras letras corresponde en exclusiva a nuestro autor.

La tradición de los maestros ortógrafos se continuó en autores como Diego Bueno, con su *Arte nuevo de enseñar a leer, escribir y contar príncipes y señores* (1690) o Francisco Sánchez Montero y su *Escuela de prima ciencia. Primera grada sobre la cual se funda la escala para subir a la cumbre de la sabiduría adquirida. Reglas y preceptos generales para saber leer y escribir con perfección el lenguaje castellano* (1713), y culminan con las propuestas de los maestros ilustrados que renovaron nuestras escuelas ya a finales del XVIII, pero el análisis de sus obras trasciende los límites cronológicos de este estudio.

### Conclusiones

Durante las décadas centrales del Siglo de Oro, coincidiendo con el apogeo de nuestra literatura clásica, un grupo de maestros participó en la polémica sobre la ortografía del español con la publicación de un corpus que se ha revelado imprescindible para el estudio de la enseñanza de la lectura y la escritura en la época. Todas las ortografías escritas por maestros ortógrafos contenían reflexiones pedagógicas sobre la alfabetización, la enseñanza de la lectura y las escuelas de primeras letras, mientras que apenas un tercio de los ortógrafos españoles del Siglo de Oro emplean lo que hemos llamado el argumento pedagógico en defensa o en contra de la ortografía fonética. Los maestros

<sup>43</sup> Cfr. Gómez Camacho, *Las ideas pedagógicas en la Ortografía castellana de Mateo Alemán*, cit.; p. 164-165.

<sup>44</sup> Sobre el maestro Ramírez de Carrión, véase: A. Gascón, J. G. Storch, *Manuel Ramírez de Carrión, maestro de sordos en el siglo XVII: nuevos apuntes biográficos*, «Cultura sorda», 2009, <[http://www.cultura-sorda.eu/resources/Gascon\\_Storch\\_Ramirez-de-Carrion\\_2009.pdf](http://www.cultura-sorda.eu/resources/Gascon_Storch_Ramirez-de-Carrion_2009.pdf)> (último acceso: 1 de Mayo de 2015).

ortógrafos se caracterizaron en consecuencia por una especial sensibilidad hacia el mundo infantil y los procesos de alfabetización en el ámbito ortográfico.

El carácter innovador de las propuestas pedagógicas de los maestros ortógrafos no tiene relación directa con la defensa de la novedad ortográfica según el principio fonético en la escritura. Con la excepción de Juan de Robles, no se pronuncian con claridad en favor de la reforma ortográfica del español y prefieren una postura ecléctica entre la tradición de impresores y escribanos, y la simplificación de las grafías etimológicas heredadas de la escritura latina. Si los grandes ortógrafos fonéticos del siglo XVII se caracterizaron por su pensamiento educativo (singularmente Mateo Alemán y Gonzalo Correas), esta relación no se repite en los maestros que escribieron ortografías en la época.

En general, los maestros ortógrafos apuntan la necesidad de superar los inconvenientes del método alfabético tradicional de enseñanza de la lectura, especialmente el descifrado memorístico y mecanizado, y sugieren una renovación del mismo en diversos aspectos. Todos ellos reivindican también su condición de maestros de primeras letras (un oficio poco prestigiado en la época) y formulan críticas e indicaciones sobre la formación de quienes se dedicaban a la alfabetización de los niños. Sin embargo, no se caracterizaron por un pensamiento educativo diferenciado en sus ortografías frente a otros ortógrafos que emplearon argumentos pedagógicos en la polémica sobre la escritura fonética de nuestra lengua; sus propuestas son diversas y con frecuencia aparecen en otros autores que nada tuvieron que ver con las escuelas de primeras letras.

Bajo la etiqueta de ortografías menores, se oculta un ingente caudal de reflexión educativa que describe con precisión cómo se concebía el proceso de alfabetización en el español clásico y anticipan propuestas innovadoras que no se pondrán en práctica sino en los siglos XVIII y XIX. Los maestros ortógrafos deben ocupar un lugar preeminente en la historia de la educación en el Siglo de Oro, una época dorada también en el pensamiento educativo que hasta hoy ha pasado inadvertida.





# Politiche educative nella *Nueva Granada* e nel *Reino de Chile*. Caballero y Góngora e Salas y Corbalàn, due intellettuali nel Secolo dei Lumi

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*Educational policies in Nueva Granada and in Reino de Chile  
Caballero y Góngora and Salas y Corbalàn, two intellectuals in the Age of Enlightenment*

ABSTRACT: Antonio Caballero y Góngora and Manuel de Salas y Corbalàn represent two intellectuals- from Nueva Granada and from Reino de Chile, respectively- who facilitated the scientific debate about the question of Education. The education of young disciples who wish to take up a civil, or ecclesiastical or artistic career was at the heart of their reflections about educational approaches during the most prolific years of Hispanic-American Enlightenment. We are going to analyze the primary sources collected in the National Historical Archives of Colombia and Chile, the recommended readings in the writings of the two erudites, the proposals of teaching organization in Universidad de San Carlos in Santafé de Bogotá and in Academia de San Luis in Santiago. The goal is to retrace the moments that preceded the establishment of a system of public academic education in those countries.

EET/TEE KEYWORDS: Educational policies; Higher Education; Colombia; Chile; XVIII<sup>th</sup> Century.

## Introduzione

Nel presente articolo analizzeremo le tappe precedenti al consolidarsi del sistema di studi superiori colombiano e cileno durante l'epoca del Lumi, in particolare, metteremo in risalto l'importante eredità lasciata da due figure di spicco dell'epoca, Antonio Caballero y Góngora e Manuel de Salas y Corbalán. È nostra convinzione che i due citati, grazie ai modelli cui si ispirarono per stabilire un complesso sistema di riforme in tema di politiche educazionali, portarono la Nuova Granada e il Reino de Chile a stabilire le basi della futura istruzione pubblica universitaria. Il primo occupandosi della formazione dei giovani bogotani avviati alla carriera civile o ecclesiastica, il secondo focalizzando i propri sforzi sull'educazione di chi volesse dedicarsi tanto alle Belle Arti come all'industria. Ci dedicheremo in primo luogo al cordovese Caballero e poi al santiaghino Salas, soffermandoci sui piani di studio proposti dai due, in special modo sulle letture consigliate per l'educazione degli studenti dell'Università di San Carlos di Bogotà e dell'Academia de San Luis di Santiago.

Abbiamo deciso di riportare le fonti consultate nella lingua originale del castigliano, convinti che le traduzioni siano state spesso motivo di fraintendimento del messaggio dei due autori<sup>1</sup>.

### 1. Il caso colombiano: l'Arcivescovo Viceré Antonio Caballero y Góngora

Tra le figure di maggior rilievo nel vasto panorama dell'amministrazione iberoamericana del Settecento, l'andaluso Antonio Caballero y Góngora (Priego de Cordova, 1723 – Cordova, 1796), per le cariche di Arcivescovo in Spagna e Viceré d'oltreoceano nella Nueva Granada, fu uno dei rappresentanti emblematici delle alte sfere del potere ecclesiastico e statale<sup>2</sup>. I numerosi studi sul contesto dei sistemi educativi nel quale Góngora si mosse e per cui

<sup>1</sup> I documenti in lingua originale sono i seguenti: A. Caballero y Góngora, *Plan de Estudios generales que se propone al Rey Nuestro Señor, para establecer, si es de Su Soberano Real agrado en la ciudad de Santafé*, Archivo General de la Nación Colombia (AGNC), *Instrucción Pública, Santafé, 1787*, Vol. 2, ff. 1-23; i lavori sulla vita e le opere di Manuel de Salas sono stati riuniti in tre volumi pubblicati dall'Universidad de Chile agli inizi del secolo scorso: M. de Salas, *Escritos de Don Manuel de Salas y documentos relativos a él y a su familia, obra publicada por la Universidad de Chile*, Santiago del Cile, Impr. Cervantes, 1910-1914.

<sup>2</sup> Per notizie sulla biografia di Caballero y Góngora, cfr. J. Sarrailh, *La España ilustrada de la segunda mitad del siglo XVIII*, Madrid, Fondo de Cultura Económica España, 1957, pp. 28-29. In questa sede segnaliamo i suoi studi nella città di Granada, presso i collegi dei Santi Bartolomeo e Santiago (1738-1743) e in quello di Santa Caterina (1743-1744). È documentata la sua partecipazione nei concorsi per esercitare da canonico a Cadice e Toledo, rispettivamente negli anni 1744 e 1753. Fu nominato vescovo delle città di Merida dello Yucatán e de L'Avana, e del vescovato del Chiapas. Nel 1776 divenne Arcivescovo di Santafé di Bogotà.

rimandiamo alla bibliografia in nota, offrono oggi una più obiettiva analisi del suo procedere nella Storia dell'attuale Colombia<sup>3</sup>. Crediamo che le posizioni politiche tendenti all'assolutismo regio e l'atteggiamento ancora da chiarire nell'episodio dei *Comuneros*<sup>4</sup>, che gli hanno valso l'esclusione dalle commemorazioni ufficiali in una contemporanea *damnatio memoriae* da parte della storiografia euroamericana<sup>5</sup>, siano state alcune tra le cause dell'errata interpretazione del suo ruolo nell'elaborazione e conseguente evoluzione del sistema formativo neogranadino.

Lo studio del pensiero ideologico del cordovese può realizzarsi a partire dall'analisi del suo *Plan de Estudios* elaborato nel 1787, vero e proprio codice politico-ecclesiastico concepito per l'educazione dei giovani bogotani dell'ultimo quarto del XVIII secolo. Il *Plan de Estudios Generales de Educación Superior*, redatto a partire dalla proposta del 1774 di Francisco Antonio Moreno y Escandón<sup>6</sup>, rispetto alla quale Caballero presenta necessari cambi disegnati sul rinnovato stato delle cose nel vicereame neogranadino, scaturisce dall'entrata in scena dei Borbone con il loro riformismo illuminato<sup>7</sup>. Particolare attenzione fu dedicata alla formazione e addestramento professionale dei maestri, sul come e

<sup>3</sup> J. Jaramillo, *El proceso de la educación del virreinato a la época contemporánea*, in *Manual de Historia de Colombia*, Tomo III, Bogotá, Colcultura-Tercer Mundo, 1992, pp. 247-339; M.I. Lafuente, *Las ideas filosófico-Educativas del positivismo y su influencia en las reformas universitarias en Colombia*, in D. Soto Arango (ed.), *Estudios sobre la Universidad Latinoamericana. De la colonia al siglo XXI*, Madrid, Doce Calles, 2004, pp. 135-158; G. Porras Troconis, *Historia de la cultura en el Nuevo Reino de Granada*, Siviglia, Consejo Superior de Investigaciones Científicas, 1952; R. Silva, *Saber, cultura y sociedad en el Nuevo Reino de Granada: siglos XVII y XVIII*, Medellín, La Carreta, 2004; O. Saldarriaga, *El cánón de las ciencias universitarias en la Nueva Granada, 1774-1883*, in C. Recio Blanco, H. Quinceno Castrillón (ed.), *Independencia, educación y cultura. Memorias del Simposio*, Cali, Alcaldía de Santiago de Cali y Universidad del Valle, 2010, pp. 159-187.

<sup>4</sup> Cfr. J.M. Pérez Ayala, *Antonio Caballero y Góngora, virrey y arzobispo de Santa Fe, 1723-1796*, Bogotá, Impr. Municipal, 1951; C. Vidales, *Estrategias y tácticas en la rebelión de masas: los comuneros de la Nueva Granada (1781-1782)*, Stoccolma, Institute of Latin American Studies, 1982.

<sup>5</sup> G. Colmenares, *Relaciones e informes de los gobernantes de la Nueva Granada*, Bogotá, Biblioteca Banco Popular, 1989, Vol. I. pp. 22-23.

<sup>6</sup> Per la redazione del testo l'autore si ispirò all'esposizione del sistema copernicano che nello stesso anno José Celestino Mutis aveva presentato. Due anni dopo il viceré Manuel Guirior ne esaltava le virtù e nel 1778 il piano ricevette l'approvazione reale. Nonostante la sua validità, la riforma di Moreno trovò applicazione solo tra il 1774 e il 1779. Cfr. F.A. Moreno y Escandón, *Método provisional de estudios para los colegios de Santa Fe de Bogotá*, in G. Hernández de Alba (ed.), *Documentos para la historia de la educación en Colombia*, Bogotá, Kelly, 1980, Vol. IV, pp. 195-227. Per ulteriori approfondimenti sulla riforma di Moreno y Escandón, cfr. D. Soto Arango, *La reforma del plan de estudios del fiscal Moreno y Escandón 1774-1779*, Bogotá, Centro Editorial Universidad del Rosario, 2004; C.H. Valencia Calvo, Y.E. Loaiza Zuluaga, *Plan de estudios generales de Moreno y Escandón*, «Revista Historia de la Educación Colombiana», n. 5, 2002, pp. 9-23.

<sup>7</sup> Caballero y Góngora, *Plan de Estudios generales*, cit., f.1 r-v. Le citazioni dal documento mantengono l'ortografia originale.

cosa avrebbero dovuto insegnare. L'istituzione fondata per metterla in atto fu denominata Universidad de San Carlos<sup>8</sup>.

Apparato burocratico e amministrazione erano affidati ad organi rettori autoregolamentati, responsabili dell'applicazione delle regole che la Corona aveva dettato in materia di piani di studio. A guidare l'istituzione educativa sarebbero stati Rettori e Consiglieri, il Cancelliere e il Direttore responsabile degli Studi, affiancati dal «cuerpo de la universidad» - per usare le parole di Caballero - composto da sei professori, dottori e maestri, diplomati, un bibliotecario, un ufficiale tributario ed un segretario<sup>9</sup>, «[...] estos seis profesores compondrán una pequeña academia de cada ciencia o arte [...] es de su inspección repasar a los jóvenes las lecciones que se le han dado en las aulas, celarlos, alentar su aplicación y promover por quanto medios sean posibles las facultades de que son profesores»<sup>10</sup>. Coloro che avessero voluto prestar servizio alla San Carlos avrebbe dovuto possedere debita istruzione: il segretario sarebbe stato «una persona muy instruida [...], el bibliotecario se elegirá entre los doctores»<sup>11</sup>, gli studenti più meritevoli avrebbero ricevuto «elogios a la ciencia»<sup>12</sup>, ossia premi, uno dei quali era una somma pari a «cien pesos»<sup>13</sup>.

## 2. Il caso cileno: l'intellettuale santiagoino Manuel de Salas

Manuel Silverio Antonio de Salas y Corbalán, questo il nome completo, nacque il 19 giugno 1754 a Santiago, ove morì nel 1841. La famiglia d'origine faceva parte dell'elitario gruppo di quell'aristocrazia andina politicamente impegnata che aveva dato i natali alla generazione dei fautori dell'Indipendenza<sup>14</sup>. Fin da giovane ricoprì importanti incarichi pubblici: a soli 21 anni era *Regidor del Cabildo* di Santiago e nel 1796 *Diputado del Barrio de la Catedral* sotto la cui giurisdizione erano cinque isolati, detti *cuadras*. Tra il 1777 e il 1782 viaggiò con suo padre in Europa, visitando Madrid e le città dell'Andalusia. Al ritorno in Cile emerse nitidamente l'influenza esercitata su di lui dalla lettura dei grandi

<sup>8</sup> Il *Plan* premiava la collaborazione tra professori residenti, colleghi e subalterni, che si sarebbero riuniti mensilmente per uno scambio di riflessioni, e consegnando annualmente relazioni dettagliate sulle questioni più importanti sorte durante l'anno scolastico, *ibid.*, ff. 4-5.

<sup>9</sup> Per garantire il completo controllo educativo da parte dello Stato, Góngora dispose che «ni el Canciller, ni el Director, ni los tres Rectores por si juntos podrán determinar cosa alguna en orden a la economía, nuevos estatutos, quantas de caja y fondo de la universidad y otros», *ibid.*, f. 5.

<sup>10</sup> *Ibid.*, f. 6.

<sup>11</sup> *Ibid.*, f. 8.

<sup>12</sup> *Ibid.*

<sup>13</sup> *Ibid.*

<sup>14</sup> M.L. Amunátegui Aldunate, N. Desmadryl, *Manuel de Salas: retrato y biografía*, en *Galería nacional o Colección de biografías i retratos de hombres celebres de Chile, escrita por los principales literatos del país*, Santiago del Cile, Impr. Chilena, 1854, Vol. 1, pp. 44-56.

teorici dell'Illuminismo e non a caso il 21 novembre 1814 fu esiliato sull'isola di Juan Fernández per l'attiva adesione alla causa dell'Emancipazione del Paese<sup>15</sup>.

Prese parte alla redazione del *Reglamento Constitucional* del 1812, dopo essersi garantito un posto nell'Olimpo degli Umanisti promulgato dalla *Ley de Libertad de Ventres* che decretava la condizione di uomo libero per i figli degli schiavi nati in territorio cileno, proibendo l'ingresso di nuovi schiavi nel Paese<sup>16</sup>. Convinti che i suoi meriti vadano ben oltre la fondazione e l'attività nell'Academia de San Luis, crediamo che a Salas si debba il primo dibattito scientifico intorno all'educazione artistica in Cile<sup>17</sup>. La sua visione dell'insegnamento rispondeva a tre principi fondamentali che furono guida nell'intera carriera, e cioè che tutte le discipline abbiano uguale importanza, che l'insegnamento del disegno comporti necessariamente l'uso di modelli sia di gesso che dal vivo e che le lezioni di disegno debbano essere dirette da maestri preparati che seguano un piano di studi stabilito<sup>18</sup>.

Il primo accenno a voler fondare in Santiago un'accademia che rispondesse a tali requisiti risale al 1 dicembre 1795, come si evince da quanto inviato da Salas ai *Señores de la Junta del Consulado*<sup>19</sup>. L'importanza del documento dal titolo *Representación al Consulado sobre la necesidad de establecer un aula de matemáticas*<sup>20</sup> risiede in diverse questioni sollevate dall'autore:

- il disegno è disciplina autonoma rispetto alla geometria e all'aritmetica;
- così come le due materie, il disegno è indispensabile per districarsi con maestria sia in agricoltura sia nel commercio e nell'industria;
- affinché le Belle Arti fioriscano in Cile è essenziale che gli artisti conoscano i principi fondamentali del disegno, in mancanza dei quali le Arti non progrediscono.

È chiaro come Salas fosse permeato delle idee illuministe allora circolanti nei salotti di tutta Europa<sup>21</sup>. In tal senso, Sol Serrano evidenzia come in Cile i venti di riforma che soffiavano nell'epoca dei Borbone trovassero terreno fertile

<sup>15</sup> M. Romo Sánchez, *Prisión de los patriotas chilenos en Juan Fernández, 1814-1817*, Santiago del Cile, Apostrophes Ediciones, 2004, p. 106.

<sup>16</sup> Nel 1823 Salas promosse la totale abolizione della schiavitù in Cile, cfr D. Amunategui Solar, G. Feliú Cruz, *La Abolición de la Esclavitud en Chile: estudio histórico y social*, Santiago del Cile, Universitaria, 1973, in part. pp. 60-69.

<sup>17</sup> N. Cinelli, *Hacia la enseñanza de los estudios artísticos en Chile: Manuel de Salas y la Academia de San Luis*, «Alpha, Revista de Artes, Letras y Filosofía de la Universidad de Los Lagos», vol. 20, n. 42, 2016, pp. 297-310.

<sup>18</sup> M.L. Amunategui Aldunate, *Don Manuel de Salas. 1754-1841*, Santiago del Cile, Imprenta Nacional, 1895.

<sup>19</sup> P. Berríos (ed.), *Del taller a las aulas. La institución moderna del arte en Chile (1793-1910)*, Santiago del Cile, LOM Ediciones, 2009, p. 38.

<sup>20</sup> I. Vergara Villegas, *La enseñanza del dibujo artístico en Chile. 1797-1858*, Tesi Dottorale, Dipartimento di Disegno (Direttore: Plascencia Climent, Carlos), Valenza, Universitat Politècnica de València, Anno Accademico 2008-2009, in part. pp. 161-188.

<sup>21</sup> Cfr. L. Celis, *Manuel de Salas. Pensamiento educativo en tiempo de transición*, «Revista pensamiento Educativo» vol. 34, n. 1, giugno 2004, pp. 18-27.

tra i *criollos*, e i santiaghini in particolare, essendone Salas il rappresentate per eccellenza<sup>22</sup>. Non sempre questi proponeva argomenti scientifici per avallare le proprie convinzioni, come nel passaggio sulla necessità di studiare i principi della fisica, della metallurgia e della mineralogia affinché si potessero sfruttare con razionalità le risorse minerarie delle quali il Cile abbondava. Ciononostante, si deve sottolineare l'intrepida determinazione mostrata dal santiaghino nel proporre una soluzione:

No debiendo dudarse de la necesidad que hai de tener principios de jeometría, aritmética i dibujo, para tratar con acierto de la agricultura, comercio e industria. Parece que de ningún modo pueden VV.SS. llenar mejor el encargo de proteger i promover estos tres ramos que proporcionando à la juventud tales conocimientos. [...] Lo conseguiràn destinando la sala inmediata al tribunal que durante el día sirve de recibimiento ó antesala, para que en ella oigan al principio de la noche, lecciones de estas tres partes de las matemáticas los alumnos que quieran, sin haber màs gasto que el de papel<sup>23</sup>.

Per Isabel Cruz de Amenàbar dobbiamo a lui «el destacado papel en el desarrollo cultural de las postrimerías de la Colonia [...] ilustre filàntropo, educador, promotor de las artes e industrias diversas, quién representa acabadamente la influencia de la mentalidad ilustrada en el Chile de fines del siglo XVIII»<sup>24</sup>.

### 3. La formazione neogranadina nel *Plan de Estudios generales* di Caballero y Góngora

L'intero apparato pedagogico proposto dal cordovese guardava a due argomenti fondamentali, al come e al cosa insegnare. Caballero y Góngora si espresse in termini alquanto critici nei confronti del corrente metodo educativo in Bogotà, definito "sterile": «[...] el estudio de las ciencias inútiles no ha causado mal tan grave, como el método que se observa en la educación de la juventud»<sup>25</sup>. Urgeva una riforma nella didattica e nel metodo impiegato, attraverso strategie suggerite da Góngora nel *Plan*, ove si rileva la volontà di dare inizio ad sistema formativo capace, con metodi diversi, rinnovati stimoli e un corpus docente qualificato, di preparare i giovani ad intraprendere la

<sup>22</sup> S. Serrano, *La Revolución Francesa y la formación nacional de educación en Chile* in R. Krebs, C. Gazmuri, *La Revolución Francesa y Chile*, Santiago del Cile, Universitaria, 1990, pp. 247-275, in part. p. 249.

<sup>23</sup> M. de Salas, *Escritos de Don Manuel de Salas y documentos relativos a él y a su familia, obra publicada por la Universidad de Chile*, Santiago del Cile, Impr. Cervantes, 1910-1914, Vol. I, p. 567.

<sup>24</sup> I. Cruz de Amenàbar, *Arte: lo mejor en la historia de la pintura y escultura en Chile*, Santiago del Cile, Editorial Antártica, 1989, p. 99.

<sup>25</sup> Caballero y Góngora, *Plan de Estudios generales*, cit., f. 11.

prestigiosa carriera ecclesiastica o civile. Di fronte alle difficoltà individuate nel sistema neogranadino, Góngora proponeva da un lato l'alternativa dello studio di opere utili ad influenzare positivamente le idee circolanti nella San Carlos, e dall'altro l'insegnamento della teologia di autori allora poco studiati nella Nueva Granada. Raccomandò l'uso del latino nelle letture di Teologia Sacra e nell'esercizio della scrittura, e della lingua nativa per lo studio delle opere per le altre discipline.

La volontà di istruire i giovani discepoli attraverso dogmi cattolici, allo stesso tempo alimentandone l'inclinazione per le scienze sperimentali, facilita la comprensione dell'orientamento ideologico dell'arcivescovo. Siamo di fronte al cattolico illuminista che vuole conciliare fede cattolica e apertura verso esigenze moderne, quanto, in altre parole, viene dal giansenismo spagnolo. Ulteriore prova delle simpatie di Góngora per tale dottrina teologica è nel disegno di far occupare le diverse cattedre da membri di ordini religiosi contrapposti ai Gesuiti. È da ipotizzare che l'adozione di simili posizioni avesse la *raison d'être* nell'impulso della politica regalista di Carlo III di Borbone in Spagna, con l'espulsione dei Gesuiti da tutti i territori monarchici. Gli episodi permisero ai giansenisti di introdurre riforme universitarie ed estirpare le impostazioni dottrinarie della Compagnia nell'ambito della formazione. Non a caso il Viceré, ispirato da desiderio rinnovatore e forte della propria erudizione, suggeriva la lettura degli eclettici testi di autori con posizioni riformatrici, nell'intento di porre fine a quell'impostazione di formazione scolastica che aveva animato fino a quel momento i centri preposti di Bogotá<sup>26</sup>. Sono le cattedre di Teologia a manifestare l'eclettismo, sottilmente rinvenibile nei continui riferimenti ad opere di autori dalle tendenze gianseniste.

Ad ulteriore prova, basti citare le cattedre di Storia e Disciplina Ecclesiastica affidate ai Francescani, per lo studio delle quali testo base sarebbe stato il *Breviario* di padre Gian Lorenzo Berti, alfiere italiano della scuola teologica agostiniana e segretario generale dell'Ordine<sup>27</sup>. Il tomo *Ecclesiasticae Historiae Breuiarium* edito a Pisa nel 1760 e redatto negli ultimi anni della vita di Berti su incarico del padre generale F. S. Vázquez, ebbe ampia diffusione, testimoniata dalle numerose ristampe seguite fino al 1823, anno in cui se ne registra l'ultima a cura dell'editore Remondini di Bassano del Grappa. Anni addietro, fra il 1739 ed il 1745, Berti era stato tacciato di giansenismo per la pubblicazione *De theologicis disciplinæ*, ma l'accusa, sostenuta dai vescovi francesi Jean d'Ise de Saléon e Jean-Joseph Languet de Gergy, fu dichiarata infondata per volere di Papa Benedetto XIV, in difesa del quale poi Berti pubblicò a Roma nel 1747

<sup>26</sup> Cfr. J. Ocampo López, C. Soler Lizarazo, *Reformismo en la educación colombiana: historia de las políticas educativas 1770-1840*, Colombia, Instituto para la Investigación Educativa y el Desarrollo Pedagógico (IDEP), Alcaldía Mayor de Bogotá, DC, 2012.

<sup>27</sup> Cfr. G. Pignatelli, *Berti Gianlorenzo*, in *Dizionario Biografico degli Italiani*, Vol. 9, Roma, Istituto della Enciclopedia italiana, 1967, pp. 516-521; N. Weber, *Giovanni Lorenzo Berti*, in *The Catholic Encyclopedia*, Vol. 2, New York, Robert Appleton Company, 1907, *ad vocem*.

*l'Augustinianum systema de gratia ab iniqua Bajani, & Janseniani erroris insimulazione vindicatum.*

Non mancarono i riferimenti a Claude Fleury<sup>28</sup>, storico ecclesiastico parigino ritenuto giansenista moderato e appartenente alla scuola francese di storia critica revisionista, che propugnava il ritorno al sentimento religioso degli antichi cristiani.

Le posizioni di Caballero y Góngora sono ancora più delineate se analizziamo il complesso delle altre cattedre proposte<sup>29</sup> e dei relativi programmi scolastici, dove si lascia intravedere la simpatia dell'arcivescovo per il filosofo Bernard Lamy, teologo moralista lo studio del quale i giansenisti consigliavano a base di erudizione; in uno con le opere di Lamy, si ponevano le *Disquisizioni* di Claude Frassen, teologo restauratore del Terz'Ordine Secolare di San Francesco, e gli insegnamenti del benedettino Don Agustín Calmet, anch'egli noto filogiansenista. Coinvolto nel *Plan*, anche l'Ordine degli Agostiniani Scalzi cui spettava la «Càthedra de Theología Moral Perpetua». Góngora propose che per «enseñar por el Catecismo de Puget se tendràn presentes las obras de Antoine Concina y Cunigliati»<sup>30</sup>.

Storicamente ben conosciute le dispute tra Gesuiti e Agostiniani: affidato inizialmente ai primi l'insegnamento della Teologia Morale, il corso passò dal fatidico 1767 ad essere dettato dagli Agostiniani che optarono per il *Catechismo* redatto nel 1702 dall'oratoriano Puget su raccomandazione del vescovo di Montpellier Colbert, fratello dell'omonimo ministro e tra gli organizzatori del giansenismo francese<sup>31</sup>. Il riferimento a Concina e Cunigliati è dovuto ai teologi domenicani. Tanto l'opera di Concina, *Theología christiana dogmático-moralis* di chiare tendenze filogianseniste, quanto quella del Cunigliati, *Universae theologiae moralis accurata complexio institutuendis candidatis accomodata* che si poteva sulla medesima linea, furono ben accolte nei seminari e nelle facoltà teologiche, in particolare per la funzione pedagogica<sup>32</sup>.

In virtù della sua formazione teorico-pratica in linea con i precetti di San Domenico, l'arcivescovo stabilì che lo studio della «Theología de Prima Perpetua [...] se abre siempre que concluyen las escrituras en las mañanas de los 18 meses, se explicaran las doce primeras materias por la suma de Santo Thomas y compendio de Berti»<sup>33</sup>. Intanto la «Cathedra de Theología vísperas perpetua, -serà- al cargo de los Agustinos Descalzos. Sigue el curso a la anterior y se enseñará por los mismos autores en las tardes»<sup>34</sup>. L'intenzione del Viceré

<sup>28</sup> Fleury fu personaggio che esercitò grande influenza su illuministi quali Mayans, Climent, Campomanes, Aranda, Azara.

<sup>29</sup> Caballero y Góngora, *Plan de Estudios generales*, cit., f. 21.

<sup>30</sup> Caballero y Góngora, *Plan de Estudios generales*, cit., f. 21.

<sup>31</sup> L'opera venne tradotta in castigliano nel 1710 ed ebbe gran diffusione in Spagna e America.

<sup>32</sup> Caballero y Góngora, *Plan de Estudios generales*, cit., f. 21.

<sup>33</sup> *Ibid.*

<sup>34</sup> *Ibid.*



volta a non scontrarsi con l'ortodossia ufficiale nella sua doppia connotazione politico-religiosa, permette oggi di fare maggiore chiarezza sul complesso scenario in cui assunse la carica di governatore.

Si era in epoca nella quale correnti intellettuali quali gallicanesimo e regalismo si diffondevano rapidamente ed il gioco di potere e di forze istituzionali vedeva in disputa Chiesa e Stato; anni che vedevano coesistere, non senza difficoltà, spinte rinnovatrici e tradizione religiosa, e nei quali la crisi in tema di formazione scolastica ambiva ad una riforma adeguata che mettesse d'accordo insegnamento speculativo e metodo sperimentale.

In linea con i principi del despotismo illuminato del momento, il Viceré Caballero legittimò il controllo statale in tema educativo, regolando programmi, libri di testo ed autori sotto l'egida della dottrina cristiana. Cuore pulsante del sistema sarebbe stato il maestro, animato da alti valori morali e con un nutrito bagaglio di conoscenze che spaziavano dalle Lettere alle Scienze.

L'apprendimento della lettura e della scrittura prevedeva lezioni quotidiane durante le quali l'arcivescovo suggeriva di estrapolare dalle opere di autori eruditi le rappresentazioni di luoghi, la narrazione delle imprese di eroi storicamente riconosciuti e la descrizione dei fenomeni naturali; e così facendo, lo spirito dei giovani sarebbe stato colmato di saggezza:

no haviendo por ahora fondos sino para una sola cathedra se distribuirà los discípulos en dos clases. A los primeros se enseñaran los rudimentos con sencillez, claridad y brevedad. Por esas circunstancias parecen màs adaptables las gramàticas que escribieron nuestros celebres profesores Antonio de Nebrija y Simón Abrill. A los segundos se exercitarà en la sintaxis y en la traducción de buenos autores latinos, pero lo màs fáciles y perceptibles, tales son la Fabulas de Fedro, los Comisarios de César, Quinto Cursio, el Breviario, el Concilio de Trento y su catecismo, las epístolas de san Gerónimo, y otros libros introducidos en nuestras aulas son en verdad mui propios para corregir los desordenes de la juventud pero no deben tomarse por modelos de la lengua latina en su pureza y propiedad como se intenta. Con la lección diaria de aquellos autores conocerà el maestro sus preceptos tomando de allí ejemplos para instruirse màs radicalmente a sus discípulos<sup>35</sup>.

Nell'insegnamento delle scienze umane il cordovese auspicò lo studio di autori ispanoamericani, quali Los Argensolas, Garcilazos, Villegas, Góngoras<sup>36</sup>, così come dei classici greco-romani con le opere di grandi storici, oratori e poeti del calibro di Sallustio, Cicerone, Virgilio, Quintiliano, Ovidio e Orazio. Gli alunni, secondo le proprie inclinazioni, avrebbero ricevuto i volumi da consultare, tradurre, memorizzare e recitare<sup>37</sup>.

Il nuovo metodo per lo studio della Filosofia stabiliva che, previa acquisizione delle nozioni di base delle scienze esatte – preminenti rispetto alla metafisica –,

<sup>35</sup> Caballero y Góngora, *Plan de Estudios generales*, cit., f. 15.

<sup>36</sup> *Ibid.*

<sup>37</sup> *Ibid.*, ff. 15-16.

gli alunni maggiormente meritevoli sarebbero transitati direttamente allo studio del Diritto. Scriveva Caballero:

Los discípulos más provechosos pueden pasar de aquí al estudio del derecho. En el segundo año precediendo algunas nociones de aritmética, geometría, trigonometría y algebra en que únicamente se explicarán los teoremas y problemas indispensablemente necesarios para el estudio<sup>38</sup>.

Il passaggio di livello avveniva al compimento dei primi tre anni di corso, durante i quali lo studio della Metafisica andava di pari passo con quello della Logica. Nella scelta del testo, fu preferito Antonio Genovesi, professore di Filosofia di Napoli, vincolato alle correnti scientificiste e sperimentali che animarono la sua epoca. Il prelado italiano aveva pubblicato nel 1743 il primo tomo, *Ontosophia*, degli *Elementa metaphysicae mathematicum in morem adornata*, in cui si occupava della rivoluzione cartesiana e dei suoi limiti, discorreva di gnoseologia lockiana, di scienza newtoniana e dei contributi della metafisica tedesca «dimostrando un intento confutatorio di eterodossi e libertini, ma anche un liberale eclettismo che adottava tendenze empiristiche»<sup>39</sup>.

Lo studio della Matematica e della Fisica occupava un ruolo priminente rispetto a quello delle materie classiche: «la Física se enseñará esta en general los ocho últimos meses reduciendo todas las lecciones al conocimiento del cuerpo en todas sus relaciones y leyes naturales por los mejores autores Muschenbreck Nollet y Mr. Siquad de la Fond traducido al Castellano»<sup>40</sup>. L'abate Muschenbreck era il fisico tedesco conosciuto nei circoli scientifici dell'Europa del XVIII secolo, famoso per gli studi sulla fisica e l'elettricità; Mr. Siquad de La Fond era scienziato sperimentale esperto di botanica.

Su suggerimento del citato Mutis fu introdotto lo studio della Storia Naturale sul testo *Philosophia botànica* dello svedese Carlo Linneo, padre della nomenclatura binomica per la classificazione dei tre regni, animale, vegetale e minerale. L'opera, risalente al 1751 e ritenuta la sua più influente, proponeva un sistema naturale di classificazione di tutte le specie a partire dalla creazione divina, originale ed immutabile. Quale testo tradotto, venne scelto quello del naturalista del Real Jardín Botànico, Don Antonio Palau, a sua volta sostenitore in Spagna dell'adozione del paradigma di Linneo<sup>41</sup>.

Il progetto dell'Università di Santafé di Bogotá aveva previsto diverse attività, fra le quali l'organizzazione di spedizioni botaniche e l'impulso allo studio di chimica, medicina e matematica, i cui corsi iniziarono nel 1762 protraendosi fino al 1778<sup>42</sup>. Disciplina tra le tante particolarmente prediletta da Góngora,

<sup>38</sup> *Ibid.*, f. 17.

<sup>39</sup> M.L. Perna, *Genovesi Antonio*, in *Dizionario Biografico degli Italiani*, Vol. 53, Roma, Istituto della Enciclopedia italiana, 2000, pp. 148-153.

<sup>40</sup> Caballero y Góngora, *Plan de Estudios generales*, cit., f. 17.

<sup>41</sup> *Ibid.*, f. 8.

<sup>42</sup> *Ibid.*, f. 18v.

la Chimica era articolata nelle diverse branche di Medicina e Mineralogia: «Se explicarán los principios de esta ciencia tanto lo que pertenecen a la teórica como a la práctica y se harán las correspondientes aplicaciones a los artes industriales con quienes tienen relación»<sup>43</sup>. Il progetto del 1787 recepiva il piano di studi di matematica di Mutis e la «Càtedra de Medicina y Prima y Segunda de Visperas Perpetua»<sup>44</sup>, proponendo medici europei a tenere le lezioni al fine di

enseñar esta importante facultad se les encargará que con arreglo a que se ha de erigir cathedra de Botánica y Química, con su jardín y laboratorio correspondiente, en donde los alumnos puedan instruirse perfectamente en todas las especies de operaciones de la materia médica compongan como se tiene... tendrán igualmente a su disposición teatro anatómico, donde se hará disecciones animales y se tendrán esqueletos y cuerpos artificiales<sup>45</sup>.

Questi i termini che chiudevano il compendio di costituzioni e regole per l'educazione neogranadina dell'ultimo quarto del Secolo dei Lumi, contrassegnati da chiara impronta politico-ecclesiastica ad invocare che «Dios, principio de la Sabiduría, sea también el objeto y fin de su estudio»<sup>46</sup>.

#### 4. L'educazione santiaghena nel Reglamento di Salas y Corbalán

Per approfondire sulla formazione intellettuale di Salas, interessi e credo politico e morale, ci è utile una missiva inviata il 25 gennaio 1773 da Lima al patriota cileno José Antonio Rojas durante il viaggio di questi in Europa:

Estimaré a V. que agregue a mis encargos una flauta buena i algunas estampas tanto de humo como a buril, por que estoi tomando lecciones de dibujo; i para este mismo efecto envíeme V. a Palomino, 2 tomos; a Samuel Marolois, “De arquitectura y perspectiva” 2 tomos; a Lebrun, “La Historia de Alejandro” i la de “Don Quijote”, estampadas; a Gerardo Lairesse, “Principios de Dibujos”, un tomo en folio; a Don José de Ribera, alias El Españolito. Añada V. a estos autores algunos colores que acá no se hallan, como son, alcorca de grano, carmín superfino de Florencia y azul ultramar. Mis hermanos me dicen le pida a V. “los Viajes de Ciro” en francés i “Mil y un Día”. Para mi envíe “El Paraíso Perdido” de Milton; las “Poesías del Abate Grecourt”, “El Espirit”, “El Filósofo Sans Souci”, “El Belisario”, y unas “Memorias sobre América y los Americanos”, que nuevamente han salido en francés, anónimas en tres tomos [...]. Renuene a V., aunque parezca majadería, todos mis encargos. Me da motivo para esto, la satisfacción que de V. tengo i la escasez que hay por acá de todas las cosas, tanto que hasta las putas se han acabado; y así cuando V. venga, traiga cien cajones de ellas, que tendrán pronta salida<sup>47</sup>.

<sup>43</sup> *Ibid.*

<sup>44</sup> Tali piani economico-culturali erano stati già proposti da Mutis e avallati dalle riforme di Moreno y Escandón nel 1774.

<sup>45</sup> Caballero y Góngora, *Plan de Estudios generales*, cit., f. 18v.

<sup>46</sup> *Ibid.*, f. 23.

<sup>47</sup> Riportiamo parte della *Carta de Manuel de Salas a José Antonio Rojas*, 25 de enero de

Per lo storico cileno Pereira Salas, l'opera di Palomino richiamata è *El Museo Pictórico y Escala Óptica* del 1715, trattato che senza dubbio esercitò notevole influenza nell'elaborazione delle teorie di Salas. I principi cui abbiamo prima accennato sul disegno risultano in effetti completamente in linea con le idee di Palomino, specie nel rapporto tra questa disciplina e la geometria<sup>48</sup>.

Tra gli autori citati dal nostro, leggiamo di Samuel Marolois e del suo *Mathematicum opus absolutissimum: continens geometriae, fortificationis, architecturae & Perspectivae Teoriticae ac practicae regulas, demonstrationes, & figuras perfectissimas*, opera del 1638 che disquisiva di misura, proporzione, prospettiva e vedute. Ancora, per Charles LeBrun e le stampe sulla *Vita di Alessandro Magno*, la richiesta era dovuta alla nota attività didattica svolta dall'artista francese presso l'Académie Royale de Peinture et de Sculpture, le cui idee sulla pittura impostata su principi classici già circolavano tra gli intellettuali cileni. Salas, ancora, sollecitava a Rojas l'invio del manuale *Grondlegginge der Teekenkunst zynde een korte en zekere weg om door middel van de geometrie of meetkunde, de teeken-konst volkomen te leeren* di Gerard de Lairese, disegnatore e incisore vallone, la cui inclusione in quella lista, ai fini della nostra riflessione, risulta apprezzabile giacché il pittore, conosciuto come il Possin olandese, proponeva esercizi di copia quale metodo d'insegnamento, dispensava preziosi consigli al maestro ed affrontava in maniera scientifica la teoria dell'arte didatticamente strutturata, al pari di Salas nel *Reglamento* cui accenneremo a breve.

Stupisce leggere del *Paradise Lost* di John Milton che già nel 1644 si era distinto per le riflessioni contenute nel *Tractate of Education*. Crediamo che la predilezione accordata da Salas all'autore inglese sia in effetti ascrivibile a questo breve elaborato piuttosto che all'opera maestra: Milton metteva in relazione religiosità ed etica con gli aspetti positivi di un'educazione classica applicata al cittadino in funzione del progresso del proprio paese.

Gli scritti di Salas danno prova del possesso di competenza in materia scientifica e tecnologica e di conoscenza dei processi tipici dell'industria mineraria, risorsa, questa, di cui il Cile abbondava e capace di generare profitti economici attraverso sistematico e razionale sfruttamento<sup>49</sup>.

Il *Memorial* datato 1801, epoca dell'incarico a *Síndico del Consulado*, ci fa comprendere la sua visione eclettica e completa del concetto di educazione che va oltre l'insegnamento. Si intravede qui un riferimento all'opera del Conte

1773, rispettando l'ortografia con cui si pubblicò nel terzo tomo. Cfr. Salas, *Escritos de Don Manuel de Salas y documentos relativos a él y a su familia, obra publicada por la Universidad de Chile*, cit., Vol. I, p. 116.

<sup>48</sup> E. Pereira Salas, *Historia del Arte del Reino de Chile*, Santiago, Ediciones de la Universidad de Chile, 1965, p. 177.

<sup>49</sup> Cinelli, *Hacia la enseñanza de los estudios artísticos en Chile*, cit.

di Campomanes, *Discurso sobre la educación popular de los artesanos y su fomento* del 1775<sup>50</sup>:

Nuestra España, siempre fecunda de grandes hombres, solo espera para producirlos que se les presente ocasión de distinguirse. Poetas guerreros ilustres, políticos consumados, teólogos insignes, todo lo ha tendido cuando las circunstancias lo han requerido, y más que todo, cuando los dispensadores del honor les han dirigido nuestras miradas benignas. [...] huyen cubriéndose los ojos, el interés particular, la indecisión, al amor a los errores antiguos, el error a las verdades nuevas; y sustituyéndose en lugar del fatal egoísmo aquel espíritu público que solo halla morada en las almas virtuosas y grandes, se limpia el horizonte, y su libro de oro, *La Industria y Educación Popular*, se lee con entusiasmo.

Campomanes, le cui teorie economiche gli valsero la palma di rappresentante per antonomasia del dispotismo illuminato di epoca borbonica, era sostenitore del libero esercizio delle arti, al di fuori del circuito delle corporazioni che limitavano il lavoro dell'individuo<sup>51</sup>.

Le speculazioni dell'asturiano, fonte d'ispirazione per Salas, sulle leggi regolatrici delle arti attingevano a concetti quali ordine pubblico, legge naturale, educazione; legittimavano la necessità di disciplinare gli artigiani, proponendone la riorganizzazione attraverso l'educazione sistematica:

En los gremios de artesanos hay poquísima enseñanza. Falta dibujo en los aprendices, escuela pública de cada oficio y premios de cada oficio y premios a los que adelantes o mejoren la profesión. Todo es tradicional y de poco primor en los oficios por lo común<sup>52</sup>.

Con un lessico meno forbito del Campomanes e più a portata degli eruditi santiagheni, Salas elaborò quel testo fondamentale alla causa dell'educazione, il *Reglamento del Gremio de los Plateros* del 9 aprile 1802, in cui argomentava, tra differenti questioni, l'intima relazione tra maestro e discepolo nel complesso sviluppo dell'apprendimento<sup>53</sup>:

8° Durante este tiempo, será obligación del maestro enseñarle el oficio y la doctrina cristiana, darle buen ejemplo, procurar que aprenda à leer, escribir, la aritmética vulgar y el dibujo, como requisitos todos, sin los que jamás podrá poner tienda pública. Deberà vestirlo modestamente, darle alimentos, y cama proporcionada a un muchacho pobre. Si al entrar

<sup>50</sup> Salas, *Escritos de Don Manuel de Salas y documentos relativos a él y a su familia, obra publicada por la Universidad de Chile*, cit., Vol. I, pp. 569-587.

<sup>51</sup> S. Scandellari, *Il Riformismo Illuminista nella Spagna di Carlo III: il Conte di Campomanes*, «I Castelli di Yale», n. II, 1997, pp. 195-211.

<sup>52</sup> P. Rodríguez Conte di Campomanes, *Discurso sobre la educación popular de los artesanos y su fomento*, Madrid, Imprenta de Antonio Sancha, 1775, p. 18.

<sup>53</sup> Cfr. V. Ripamonti Montt, *La Academia de Pintura en Chile en sus momentos previos*, «Intus, Legere», vol. 4, n. 1, 2010, pp. 127-153.

el aprendiz trae vestuario y cama, se le señalarà menos tiempo que al que sea necesario costearle uno y otro, al arbitro del Juez, para que la mayor duraci3n del servicio compense el gasto. Podrà ser corregido de sus faltas o desaplicaci3n, pero del modo que lo serí a un hijo, y sin usar jamàs del afrentoso azote, que solo sirve para envilecerlos y prostituirlos<sup>54</sup>.

Nei progetti, le lezioni si sarebbero tenute nell'antisala del Tribunale in orario serale, Gioacchino Toesca era uno dei docenti, architetto italiano di origini romane apprezzato dalle piú insigni accademie europee dell'epoca; i modelli da utilizzare per gli esercizi di copia sarebbero stati forniti dallo stesso Salas con sua collezione. Unica voce di spesa a gravare sul *Consulado* era quella della carta.

Nonostante i primi dinieghi, gli sforzi di Salas vennero premiati, come dimostra la firma di Carlo IV di Borbone sul *Real Orden* dato in Aranjuez il 24 luglio 1796 a sancire la creazione di un' *Escuela de Aritmética, Geometría y Dibujo*<sup>55</sup>.

Salas dovette, però, attendere il 31 gennaio 1798 per il riconoscimento legale della sua istituzione, ufficialmente per decreto reale nominata Academia de San Luis, in omaggio alla regina di Spagna prematuramente scomparsa.

C'è da segnalare come già da mesi precedenti al provvedimento, ossia da settembre<sup>56</sup> del 1797, l'Academia de San Luis avesse dato inizio alle attività, contando sull'appoggio economico dell'*Ayuntamiento* e della Corporazione dei Commercianti e fissando la sede nell'attuale via San Antonio della capitale andina.

Le lezioni di disegno principiarono a tenersi in orario serale come stabilito, con gli alunni ad avvalersi di cento modelli, tavoli, banchi, candelabri e strumenti messi a disposizione da Salas; la felice circostanza della presenza in suolo cileno del professore svizzero Martin Petri fece sì che egli stesso poté incaricarsi di tenere quelle lezioni per un anno e mezzo, mentre il Toesca si occupava dell'insegnamento di geometria e aritmetica<sup>57</sup>. La Biblioteca Nacional di Santiago conserva il *Libro de cuentas de la Academia*, documento ricco notizie interessanti sull'organizzazione docente all'interno della San Luis, che prevedeva le quattro cattedre di Disegno, Matematica, Grammatica e Lettere. Nonostante numerosi riferimenti anche alle discipline di Mineralogia e Chimica, il *Libro* non lascia spazio a dubbi su pagamenti non avvenuti a professori

<sup>54</sup> Salas, *Escritos de Don Manuel de Salas y documentos relativos a él y a su familia, obra publicada por la Universidad de Chile*, cit., Vol. I, p. 543.

<sup>55</sup> Le informazioni che seguono sono state estrapolate dal documento firmato da Salas, *Informe sobre la Academia presentado al Presidente Interno Don José de Santiago Concha, 18 settembre 1801*, in Salas, *Escritos de Don Manuel de Salas y documentos relativos a él y a su familia, obra publicada por la Universidad de Chile*, cit., Vol. I, pp. 569-590.

<sup>56</sup> Contrastanti le notizie relative al giorno preciso. Pereira Salas suggerisce l'8 settembre, mentre Amunategui lo data al 18 dello stesso mese. Cfr. Pereira Salas, *Historia del Arte del Reino de Chile*, cit., p. 179 e D. Amunategui Solar, *Los primeros años del Instituto Nacional*, Imprenta Cervantes, Santiago del Cile, 1889, p. 18.

<sup>57</sup> Partito alla volta del Perù nel 1798, Petri fu sostituito da Ignacio Fernández Arrabal, argentiere della Casa de la Moneda, ex alunno dell'Academia de San Luis.

incaricati, facendo dedurre che questi corsi non giunsero mai a dettarsi. Altra informazione rilevante, il salario più alto di 400 pesos annuali per il professore di Disegno, lascia intendere il prestigio riconosciutogli nell'organigramma dell'istituzione<sup>58</sup>.

Il destino dell'Academia, riunita la prima Junta Nacional de Gobierno il 18 settembre 1810, non poteva continuare ad essere quello di un'istituzione che beneficiasse dell'appoggio reale e Salas, molto astutamente, ne approfittò per manifestare l'esigenza di incorporarla nel Convictorio Carolino<sup>59</sup>; nello scritto datato 11 aprile 1811 e diretto al *Presidente y a los Vocales de la Junta de Gobierno*, emerge il proposito di ripristinare quel corso di disegno sospeso nel dicembre del 1799 per assenza di professore che se ne occupasse:

Llenaría todas estas miras y deseos del público el establecimiento de un colegio en que se enseñasen los principios de toda buena educación, esto es la primeras letras, idioma, dibujo, moral, aritmética, geometría y demás que sirven à formar el juicio y a preparar para estudios más serios<sup>60</sup>.

Pur se la Junta non recepì, dobbiamo sottolineare la contemporanea fondazione in Cile di diverse istituzioni volte all'educazione pubblica e privata.

La *Comisión de Educación* sorta in questa nuova fase storica accorpò in un unico centro educativo l'Academia de San Luis, l'Universidad de San Felipe e altri collegi, primo tentativo del giovane governo di controllare l'educazione cilena.

Nel documento istitutivo ufficiale si legge<sup>61</sup>:

Como la Universidad queda incorporada al Instituto, del modo prevenido en el prólogo será en adelante la academia de los sabios y el museo de las ciencias de que serán miembros los doctores, maestros y bachilleres recibido hasta la instalación de esta constitución; pero en adelante solo obtendrán estos grados los que en cada profesión hayan observado el tiempo y estudio que se señala la misma [...] Se une a la Universidad, la Sociedad Filantrópica, la Academia de Práctica, bajo sus respectivos reglamentos. [...] En las diversas salas de la misma Universidad se deberán situar el Gabinete de historia natural para lo que se trasladará allí

<sup>58</sup> Cfr. Amunategui Solar, *Los primeros años del Instituto Nacional*, cit., pp. 45-57.

<sup>59</sup> J.M. Frontaura y Arana, *Historia del Convictorio Carolino*, Santiago del Cile, Imprenta Nacional, 1889.

<sup>60</sup> Riportiamo parte del testo *Unión de la Academia de San Luis y el Colegio Carolino, Carta de Manuel de Salas del 20 de febrero de 1811 dirigida al Presidente y a los Vocales de la Junta Provisional de Gobierno*, senza modificarne l'ortografia originale. Cfr. Salas, *Escritos de Don Manuel de Salas y documentos relativos a él y a su familia, obra publicada por la Universidad de Chile*, cit., Vol. I, p. 630.

<sup>61</sup> La citazione dal *Decreto de la Junta Nacional de Gobierno que incorpora la Universidad de San Felipe al Instituto Nacional. Firmado en el Palacio de Gobierno: Francisco Antonio Pérez, Agustín de Ayzaguirre, Juan de Egaña, José Tadeo Mancheño*, Santiago del Cile, 2 de agosto de 1813, mantiene l'ortografia originale, in I. Villegas Vergara, *La enseñanza del dibujo artístico en Chile. 1797-1858*, cit., p. 182.

el principio colectado que existe en la Academia, con sus correspondientes estantes. [...] Su custodia y primera clasificación correrà al cargo de los catedráticos de Química, Botánica, y Física, bajo la inmediata inspección del virtuoso ciudadano don Manuel de Salas promotor originario de este establecimiento.

La struttura del nuovo apparato pedagogico confluito nell'Instituto Nacional e che stabiliva lo studio di materie come Geometria, Aritmetica, Disegno e Botanica, ricalcava con evidenza il modello di Salas per la San Luis. Dal citato *Memorial* conosciamo i modelli ispiratori di Salas per promuovere l'istituzione, riconducibili alle Accademie visitate nel corso del viaggio in Spagna e di cui si era potuto informare grazie a lunghe letture, ossia la San Fernando di Madrid, la malagueña e la sivigliana<sup>62</sup>.

Negli anni successivi alla fusione dei diversi centri educativi, si lavorò per dar vita e identità proprie all'Instituto Nacional; vi contribuirono le più effervescenti personalità dell'élite culturale cilena, come Juan Egaña e Francisco de Echaurren firmatari nel 1823 della relazione che avrebbe portato alla fondazione dell'Instituto qualche mese più tardi. Anche Salas diede del suo, fino al viaggio intrapreso alla volta dell'Uruguay e che l'allontanò dal Cile.

Come leggiamo nel progetto del 1823, il nuovo centro avrebbe ospitato «el Anfiteatro Anatómico, la Academia de Leyes y Prácticas Forenses, un Gimnasio, un Jardín Botánico, una Escuela de Pintura y Escultura, el Gabinete de Historia Natural, el Laboratorio Químico y la Escuela del Dibujo»<sup>63</sup>; in pratica, i laboratori che Salas avrebbe voluto avviare nella San Luis per formare quei giovani cileni che si preparavano al mondo delle Belle Arti e dell'Industria.

Parafrasando Eugenio Pereira Salas, marcata fu l'influenza dell'Academia nei suoi dieci anni di attività, che ingenerò l'esigenza di una formazione scientifica in ambiti fino allora poco approfonditi, i cui alunni furono in Cile i primi costruttori e geometri dotati di formazione tecnica e professionale<sup>64</sup>.

### *Conclusioni*

Caballero evidenziò la condizione di arretratezza nei settori di base dell'economia neogranadina dell'epoca. L'enfasi posta sull'insegnamento delle scienze applicate necessarie alla crescita dello Stato l'avrebbe indotto ad organizzare «la enseñanza de las matemáticas prestando mayor atención a las

<sup>62</sup> Salas, *Escritos de Don Manuel de Salas y documentos relativos a él y a su familia, obra publicada por la Universidad de Chile*, cit., Vol. I, p. 579.

<sup>63</sup> *Decreto de la Junta Nacional de Gobierno que incorpora la Universidad de San Felipe al Instituto Nacional*, cit., p. 184.

<sup>64</sup> Pereira Salas, *Historia del Arte del Reino de Chile*, cit., p. 183.



que tengan relación con la industria y comercio, así por ejemplo la mecánica, estadística e hidrostática y arquitectura pública civil e hidráulica»<sup>65</sup>.

Nel prefigurare una società dominata dalle scienze utili, con il *Plan* Caballero si attende che «la primera màxima de los Rectores y cathedráticos será imprimir de tal modo en sus tiernos espíritus el amor a la virtud a las ciencias y conocimientos útiles que les sean deliciosos a las fatigas de la institución del estudio»<sup>66</sup>. Formazione di stampo europeo ed esperienza in territorio americano, fu il binomio fecondo che gli permise ridisegnare le basi dell'istruzione neogranadina e sottolineare il senso di disciplina da trasmettere ai giovani studenti.

Il percorso esprimeva una pluralità di elementi trasversali, in attinenza con le politiche educative elaborate per la società dell'epoca.

Il contesto generale registrava fermenti dovuti al conflitto tra i diversi poteri statale e religioso, sotto l'egida del regalismo illuminato; le differenze ideologiche, politiche e religiose dei giansenisti si traducevano in lotte intestine tra gli stessi ordini religiosi, con dispute al loro interno su questioni relative alle lezioni da impartire e all'amministrazione dei collegi, mentre uno Stato centralista e burocratico si rafforzava in aperta contesa per il controllo dei beni e dei fondi ecclesiastici. Ancora, le trasformazioni strutturali della società borghese europea, modello di evoluzione per i territori d'oltreoceano, facevano il pari con istanze riformatrici e criticiste di autori europei sulla nuova interpretazione del mondo. Aspetto a nostro avviso essenziale, si imponeva la ricerca di un metodo per lo studio delle scienze utili, adeguato per un più redditizio ricorso alle risorse naturali e un'ottimizzazione della fiscalità a favore della Corona.

Da burocrate illuminista attento ai cambiamenti, dall'altra sponda dell'Atlantico Caballero y Góngora comprese l'ambiguo fenomeno dell'assimilazione di posizioni scientifiche contrapposte ai dogmi spirituali e religiosi tanto radicati nel quotidiano della società del vicereame della Nueva Granada, e da tale consapevolezza tentò in ambito educativo di aprire la strada verso direzioni eclettiche.

Nel *Plan* il Viceré accorda manifesta preferenza per i più moderni Francescani e Agostiniani Scalzi anziché per i Domenicani nelle lezioni di teologia; palesi ne risultano l'orientamento verso il controllo centrale dello stato nell'Educazione, la continuità del credo cattolico nelle cattedre di teologia, la modernizzazione e attualizzazione dello studio degli autori diversamente polemici e letti in Europa, oltre all'interesse per gli studi sperimentali piuttosto che per quelli speculativi. Non c'è quindi da sorprendersi se il progetto dell'Arcivescovo Viceré tentasse di conciliare religione e moderne inquietudini che dall'Europa avevano trovato terreno fertile anche nella lontana Nueva Granada.

<sup>65</sup> Caballero y Góngora, *Plan de Estudios generales*, cit., f. 8.

<sup>66</sup> *Ibid.*, f. 9.

Discorso affine merita Salas, giacché nella sua Academia confluirono impostazione tecnica propria dell'Illuminismo e impegno a non troncarsi di netto i legami con la tradizione cilena. Preferì stimolare il progresso nazionale attraverso l'assimilazione costante della lezione enciclopedista del pragmatismo e dell'utilitarismo. In tal senso è evidente l'influenza francese che segnò in maniera sostanziale l'ambito dell'educazione locale e che avrebbe condotto da lì a qualche anno alla fondazione dell'Universidad de Chile. Stava lentamente producendosi una trasformazione impegnativa: se Salas aveva introdotto il discorso del disegno in una prospettiva tecnica e scientifica più che propriamente inerente l'ambito delle Belle Arti, il nuovo impulso impresso da Juan Egaña e i suoi collaboratori lo stava dirigendo verso la formazione dei giovani artisti.

Come sottolinea Sol Serrano, l'Academia di San Luis fu la prima esperienza educativa cilena di evidente impronta illuminista, che compendì in sé le due promesse della prossima Indipendenza: fiducia nel pensiero scientifico quale strumento per trasformare la realtà e maggiore presenza dello Stato nella promozione di questo inarrestabile profondo cambiamento<sup>67</sup>. Fu, in definitiva, un epicentro tecnico e pragmatico, l'eredità intellettuale di maggior rilievo consegnata alla società cilena da Salas, per il quale, nel giorno della sua morte sopraggiuntagli il 28 novembre del 1841, non a caso il governo di Manuel Bulnes proclamò il lutto nazionale.

<sup>67</sup> Serrano, *La Revolución Francesa y la formación nacional de educación en Chile*, cit., p. 251.

# Teacher Training in Spain from late Francoism to the beginning of the Constitutional Monarchy: Reforms and Challenges\*

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**ABSTRACT:** This work aims to provide a synthesis of the model used in the initial teacher training primary school teachers in Spain from Francoism. It deals with the renovation of this educational level that took place between the implementation of the General Law of Education (LGE, 1970) until the General Law of the Organization of the Spanish Educational System (LOGSE, 1990), when a different model was implemented. The modification of teachers' roles and the re-construction of their professional identities required considerable dedication by teachers to learn new theoretical and didactic methodologies. Not only did new teachers need time to study and learn, but so did teacher trainers at teacher training colleges who were in charge of initial training. In this analysis, basic training, theory and practice, as well as disciplinary and pedagogical training and the question of gender are considered. Additionally, the presence of political ideologies and several questions related to training initiatives and educational renovation are tackled. A historical educational study combined with an ethnographic one allows us to compare the different situations and gender differences experienced by teachers during this period. This analysis contributes to our knowledge and reflections on teacher training and education in the political and social context from the end of Franco's dictatorship to the beginning of Spain's constitutional monarchy.

**EET/TEE KEYWORDS:** Educational policy; Teacher training; Gender; Renovation; Inequalities; Spain; XX<sup>th</sup> Century

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## *Introduction*

In the twilight years of Spain's dictatorship, the elaboration of a new law generated tensions in the heart of the government. With the General Law on Education (1970), the government tried to solve the huge problems of Spanish society's backwardness by building a wide ranging educational model that extended schooling to all segments of the population as well as reforming all educational levels. Among the objectives of this educational reform was to ensure equality: social and gender equality was to be the way of ensuring mobility and promotion within the new Spanish society.

The reform affected teacher training since the legislative measures substantially changed the educational model in place at the time. Bureaucratic and formal changes introduced new educational areas and substituted everyday terminology often overwhelming teachers. These terminological changes required an additional effort for teachers but were implemented to give the appearance of efficiency and innovation. With the General Law on Education, University Teacher Training Colleges for General Compulsory Education substituted the Teacher Training Colleges of the time. An important advance and significant qualitative change that positioned teacher training at a university level with graduates being awarded university diplomas. With the implementation of the 1971 Study Plan, initial training for General Basic Education teachers was diversified into specialties and the curriculum was harmonized between both sexes<sup>1</sup>.

Initial teacher training has always been a product of political evolution. Even if laws cannot change attitudes, there have been some curriculum changes and innovations that have helped transform education. Following the death of Franco and the transition to democracy, in a scenario that still largely resisted any opening up, there were teachers committed to their everyday tasks as well as to teaching "beyond the classrooms". During their professional careers, teachers faced new situations that arose from political and social changes taking place during Spain's transition to democracy. Some teachers participated in movements to renovate pedagogical practices, contributing to modernizing teaching methodology as well as becoming involved in gender issues and women's movements. This was despite the sexist roles and traditional values that remained in place at the time. Within this changing educational scenario, teaching graduates improved their status through their new university qualifications.

The role of teachers during the transition is little known. It has rarely been studied and only isolated data exist. However, it is, without doubt, important

<sup>1</sup> T. González Pérez, *La transformation de l'éducation espagnole à la fin du franquisme. La loi générale de l'éducation et la formation d'instituteurs*, «History of Education Children's Literature», vol. 5, n. 1, 2010, pp. 337-351.

to carry out historical research to highlight the participation of this collective during such a significant political period in Spain. This work is part of a wider framework that aims to investigate how teacher training has developed over time. In this case, we situate ourselves in a particular period and place: during the democratic transition of Spain. This was a period in which society was affected by new ways of understanding and organizing politics, the economy and society. At the same time as these changes were taking place, teacher training was also being reforming in terms of its strategies and direction. This paper postulates that teacher training was marked by gender roles as well as by instruction in pedagogical-scientific aspects of education. However, these gender differences, far from being explicit and prescribed operated more implicitly which, though hidden, aimed at modelling an exemplary man and an exemplary woman who could represent male and female teachers, respectively. Our aim is to analyze Spanish educational policy regarding teacher training during the transition to democracy and how this policy affected teachers (1975-1982). To carry out this research, we performed a historical-educational analysis supported by bibliographical and documentary sources as well as using ethnographic methods.

History is a complex and diverse subject; historians must tackle it with the material available, using different approaches to interpret past events. Research developed around biographies and autobiographies have awakened the interest of educational historians. The recognition of oral sources in the field of the History of Education has encouraged ethnographic research and the autobiographical genre<sup>2</sup>. Scholars refer to texts within this autobiographical category as “ego-documents”. These sources allow us to tackle the history of education from the perspective of the actors involved: mainly teachers and students. Exploring the pedagogical thinking of these individuals gives us the opportunity to recover data on the valuable contributions that were made to enrich and revitalize schools: especially, as written sources and official documents do not offer personal testimonies of protagonists.

This research aims to use sources on the periphery of conventional archives; that is why, we have resorted to teachers’ memories. The qualitative methodology applied here attempts to clarify different questions that have

<sup>2</sup> Vid. J. Giro Miranda, *Mujer y Educación. Las Maestras: Un análisis sobre la identidad de género y trabajo*, Logroño, Instituto de Estudios Riojanos, 2010; I. Goodson (ed.), *Historias de vida del profesorado*, Barcelona, Octaedro, 2004; F. Imbernón, *Vidas de maestros y maestras*, Barcelona, Grao, 2005; F. Hernández, J. Sacho, J.L. Rivas (edd.), *Historias de vida en educación: biografías en contextos*, Barcelona, Universidad de Barcelona, 2010; C. Monereo, M. Monte, *Docentes en tránsito. Incidentes críticos en secundaria*, Barcelona, Graó, 2011; J. Resina, *Querida maestra. Recuerdos y anécdotas de una vida entera dedicada a la enseñanza*, Madrid, La Esfera de los Libros, 2010; J.L. Rivas, D. Herrera, *Voz y Educación. La narrativa como enfoque de interpretación de la realidad*, Barcelona, Octaedro, 2009; S. San Román Gago, *La maestra en el proceso de cambio social de transición democrática: Espacios histórico-generacionales*, Madrid, MEC/Instituto de la Mujer, 2001.

remained unanswered about this period. It is a way to access distinct tones of information that cannot be gathered from written documents. It is a way to hear voices that are usually silent that «have been unheard, but their presence felt» that have not been heard outside of the classroom, voices that could speak to us of dreams, expectations, successes, and failures. Although they are memories, they can provide us with important data<sup>3</sup>. Open and semi-guided interviews of a representative sample of Spanish teachers from different parts of Spain have been used. The interview protocol focused on questions related to initial training and professional and personal teaching experiences. These interviews were carried out at various times throughout 2014 through various channels: explanations of the study's aims were given to teachers interested in collaborating, contacts between the teachers themselves and through the mediation of third parties.

### 1. *An intense educational policy*

Educational policies generate changes and revolutions, the intensity of these changes depend on the government and dominant ideologies at the time. These educational changes can contribute to a transformation in society with a «propaedeutic dimension»<sup>4</sup>. With authoritarian governments, laws are imposed *de facto*, preventing interventions or debates of any kind. The General Law on Education (1970) was aimed at regulating the educational system combining tradition and modernization, while still maintaining active the ideological values of the dictatorship<sup>5</sup>. For the first time, an educational law proposed the elimination of the pedagogy of exclusion and aimed to spread literacy to the whole population. It was an innovative advance that was aimed at achieving a cultural transformation, but with the challenge of having to modernize educational structures within the heart of the dictatorship. Without doubt, it was the precursor of future democratic models of teaching, but it had to overcome various obstacles, such as providing adequate funding for schools and payment for teachers<sup>6</sup>. Anyway, although educational progress did not sit well with the political order, the 1970 law modernized Spanish education and restructured the system at all levels. Its greatest contribution was to extend

<sup>3</sup> M.J. Agra, *Topografía crítica: El hacer docente y sus lugares*, en T. Eça, *Desafíos da educação artística em contextos iberoamericanos*, Porto, APECV, 2010, pp. 18-35 (quote p. 19).

<sup>4</sup> J. Torres, *La justicia curricular. El caballo de Troya de la cultura escolar*, Madrid, Morata, 2011, p. 171.

<sup>5</sup> R. Rodríguez Tapia, *La educación en la transición política Española. Biografía de una traición*, «Foro de Educación», vol. 6, n. 10, 2008, pp. 93-110 (quote p. 102).

<sup>6</sup> J. Blat Gimeno, *La crisis del sistema educativo. El derecho a la educación*, «Revista Escuela Española», n. 2376, 1977, p. 21.

basic education to the whole population thus promoting equal opportunities. However, the duality of qualifications still discriminated between students who at the end of their studies obtained a graduation certificate and those with just a school attendance certificate.

With the implementation of the General Law on Education state schooling spread and more teaching posts were created; thus children in rural areas benefited as the number of teachers increased<sup>7</sup>. School enrolment and the opening of new state schools increased rapidly, whereas enrolment in private schools was slower and in some cases came to a standstill. It was not an easy task to provide education for everyone and improve the cultural level of the Spanish population. The outlook for teachers improved as a result of legislative changes and teachers' salaries even increased. The cultural model evolved, initial teacher training improved and teachers became qualified professionals, leaving behind more "artisanal" practices. Additionally, critical awareness and qualitative renovation of teaching began to sprout up, and there was an opening up to international educational movements with the introduction of pedagogical innovations and critical movements among teachers.

However, bearing in mind the magnitude of this reform, there was a lack of appropriate training for teachers and funding to implement it. The deficiency in pedagogical training of a significant number of practicing teachers, with their personal inertia and obstacles halted the process. It was not easy to change teaching routines and attitudes of teachers who had been instilled with the ideology of national Catholicism. Educational changes can be prescribed and legislated, but for them to be effective they must adapt themselves to the existing school culture and redesign themselves to the educational contexts<sup>8</sup>. It is a fact that «pressure and support from the top, and effort and energy from below are mutually necessary»<sup>9</sup> to develop an innovative culture capable of affecting organizational structures, working conditions and to promote decision making at individual school level<sup>10</sup>.

The education system has always placed teacher training in the context of an ambivalent discourse: on the one hand, the traditional rhetoric of the importance of training, and on the other, the precarious academic situation and the scarce social consideration. Historically, it has been considered a semi-profession, but teaching requires a set of predetermined and objective areas of knowledge and the capacity to generate knowledge in others. The accepted idea at the time was that having formal knowledge equated to having the ability to

<sup>7</sup> G. Ossenbach-Sauter, *Democratization and Europeanization as Challenges to the Spanish Educational System after 1970*, «European Education», vol. 27, n. 4, 1995, pp. 72-84 (74).

<sup>8</sup> A. Bolívar, *La Lógica del Compromiso del Profesorado y la Responsabilidad de la Escuela. Una Nueva Mirada Escuela*, «Revista Electrónica Iberoamericana sobre Calidad, Eficacia y Cambio en Educación», vol. 11, n. 2, 2013, pp. 60-86 (see p. 64).

<sup>9</sup> *Ibid.*, p. 79.

<sup>10</sup> *Ibid.*, p. 64.

teach and take decisions on educational practices. Teachers during Franco's dictatorship were also politicized and marked by catholic traditions: teachers had to identify themselves with religious ideology and training. These values were present in education in the subjects studied and in the atmosphere within schools. Evolution was slow and the transformation required a permanent effort from democratic governments to improve the pedagogical inheritance.

It was a gradual process that was only completed by the end of the 20<sup>th</sup> century, finally overcoming decades of backwardness and converting Spain into a more European country<sup>11</sup>. To achieve this, improvements were needed in initial teacher training and in-service training of teachers, since modernizing the education system clearly required modernizing teachers and their training structures. In a period of legislative changes and social and cultural upheaval, the legislation underwent notable changes. At no time have reforms in the field of education been immune to attempts to modify them, or from persistent criticism from different sectors<sup>12</sup>.

However, problems in basic education were gradually solved and at least inequality was minimized. The presence of the Catholic Church was also controlled and educational management was decentralized. One of the distinguishing marks of this modernization of education was that it eventually gave rise to highly-educated generations, both quantitatively and qualitatively. Schooling expanded to include everyone, although it did not achieve full equality as new forms of segmentation and social differentiation appeared.

Another distinguishing aspect of the new law was the process of incorporating more female students in education, the implementation of coeducation and a single curriculum; although in reality a masculine model was established, suppressing material specifically for female students. However, this did not help solve traditional gender differences<sup>13</sup>. Attempts at equality still led to male predominance and adaptations to the interests and social representation of the male model<sup>14</sup>. The contradictions in gender equality present in the General Law of Education of 1970, which did not specify measures to be applied, hampered attempts at equal practices. However, the foundations were laid that enabled the recognition of the right of women to have an educational model on equal terms to that of men. The law did not entirely disregard all specific subjects related to either sex. These continued to be taught over several years though

<sup>11</sup> J. Blat Gimeno, J. *Apuntes sobre la elaboración y aplicación de la reforma educativa de 1968-1970*, «Revista de educación», n. 1 (special issue), 1992, pp. 292-293.

<sup>12</sup> A. Bolívar, *La formación inicial del profesorado y las instituciones de formación*, en J. M. Escudero y A. Luis Gómez (edd.), *La formación del profesorado y la mejora de la educación*, Barcelona, Octaedro, 2006, pp. 123-154.

<sup>13</sup> P. Ballarín Domingo, *La educación de las mujeres en la España contemporánea*, Madrid, Síntesis, 2001, pp. 136-138.

<sup>14</sup> Id., *Género y políticas educativas*, «Revista de educación», n. 6, 2004, p. 37.



disappeared owing to the change from segregated classes to mixed ones<sup>15</sup>. Despite the continued reproduction of gender stereotypes, women gained ground in educational and professional areas overcoming traditional interpretations that often attributed their academic performance to «their perseverance and their meekness more than to their intelligence»<sup>16</sup>.

## 2. *Expansion of secondary education and new profiles for teachers*

The law provided a new perspective on the teaching profession that corresponded to the need for progress of Spanish society at that time. The profiles of teaching levels were redefined. There were teachers in compulsory General Basic Education and Baccalaureate or Secondary school teachers with distinct orientations often according to their different social origins. The rise of Secondary School and a greater demand for specialized professional knowledge were fostered. These teachers were prepared for posts of responsibility and were considered as having higher status. By contrast, primary schoolteachers were undervalued and had little chance of social mobility. Around 70% of primary school teachers came from the middle-working classes and gained access to studies as a strategy for improving their social status. Their profile was linked to the low salaries they earned and their social origins<sup>17</sup>.

The universalization and expansion of teaching caused a major structural change in the education system and in teaching training. This expansion meant a constant transformation in the curricula in school education, which, in turn, required better preparation and training of school teachers. That is, the training of teachers for a standard period to teach children aged between 6 and 14 years old (primary and secondary stages). With the expansion of schooling, which included the baccalaureate stage (11-14 years old), there was an attempt to resolve or rather alleviate inequalities, a process which was a way of popularizing this level<sup>18</sup>. Furthermore, the secondary stage was now compulsory, which meant the students were quite heterogeneous and disparate<sup>19</sup>, not just a minority as had occurred in secondary schooling in the previous decade. Students came

<sup>15</sup> F. Bonal, *Una evaluación de la equidad del sistema educativo español*, «Revista de educación», n. 330, 2003, p. 79.

<sup>16</sup> C. Flecha García, *Desequilibrios de género en educación en la España Contemporánea: causas, indicadores y consecuencias*, «Areas: Revista internacional de ciencias sociales», n. 33, 2014, p. 56.

<sup>17</sup> I. Alonso Hinojal, *Una esperanza ilusoria: la elevación del prestigio del maestro*, en *Sociedad, cultura y educación (homenaje a la memoria de Carlos Lerena Alesón)*, Madrid, CIDE/UCM, 1991, p. 356.

<sup>18</sup> M. Puelles Benítez, *De la cátedra de bachillerato al profesorado de educación secundaria*, «CEE Participación educativa», special issue, 2011, p. 22.

<sup>19</sup> *Ibid.*, p. 23.

from a diverse range of social backgrounds<sup>20</sup>, as everyone was included in the school system<sup>21</sup>. However, some teachers resented this all inclusive approach often being blocked by their attitudes, cultural identities and prejudices, both teachers at baccalaureate and primary school level<sup>22</sup>.

Changes in the role of teachers and the re-construction of their professional identities required significant dedication by teachers to prepare themselves in terms of educational theory and curriculum development and, then, develop didactic methodologies. Teachers needed time to learn as did the teachers at teacher training colleges in charge of training. Teachers were faced with new challenges and new rhetoric, which led to difficulties during an already a complex time. Undoubtedly, it was a challenge for teachers, who felt limited in the attention they could give to their teaching duties. In this uncertain context, the capacity to innovate in teaching was left to changes within the schools, themselves, in order to generate improvements in education. Bureaucratic and vertical strategies of change often limit the involvement of teachers, consequently, teachers do not identify with these changes or with their new social image. In 1975, the UNESCO made a series of training recommendations for teachers<sup>23</sup>. These recommendations reflected academic concerns at an international level and were aimed at advancing and modernizing training structures to gradually extend a new worldwide education order that would be spread through national educational systems.

The transformation of the education system in Spain, with frequent changes in political groups and policies, needed time. Transition to democracy was a convulsive period, when important changes took place in politics and among the population. Spanish society had just started to evolve after being in a straitjacket for so many years, and distancing itself from an authoritarian society was difficult. However, the system became more flexible and Spanish society gradually began a process of transformation: one that would lead Spain to democracy once again. In this context, a pedagogical renovation and progress towards school democracy and plurality of alternatives were initiated. The educational experiences of pre-democratic Spanish society were crucial to change the direction of schooling. Education attempted to give answers to social needs, to discourses that emphasized differences and demands against centralized politics. Within this modernizing context,

<sup>20</sup> A. Viñao Frago, *Del bachillerato de elite a la educación secundaria para todos (España, siglo XX)*, in G. Vicente y Guerrero (ed.), *Historia de la Enseñanza Media en Aragón*, Zaragoza, Institución "Fernando el Católico" (CSIC), 2011, p. 466; Vid. M. Puelles Benítez (ed.), *Profesión y vocación docente. Presente y futuro*, Madrid, Ed. Biblioteca Nueva, 2009.

<sup>21</sup> J.M. Esteve, *La tercera revolución educativa. La educación en la sociedad del conocimiento*, Barcelona, Paidós, 2003, p. 53.

<sup>22</sup> Puelles Benítez, *De la cátedra de bachillerato al profesorado de educación secundaria*, cit., p. 26.

<sup>23</sup> UNESCO. Recommendation on the evolution of teachers' roles and the consequences of this evolution in prior and in-service teacher training, 35<sup>th</sup> International Education Conference, Geneva, 1975.

attempts were made to recover the pedagogical traditions of the first 30 years of the 20<sup>th</sup> century that had been the flagship years of Spanish education. Curricula were diversified to provide a more balanced academic training in different subjects. Another significant aspect was access to higher education for ordinary people, as mentioned above. There was a transfer from an education for elites to an education for the masses, through which Spain started to approach other European countries. However, investment in the education system was still far from that made in more advanced countries. The economic resources invested continued to be insufficient to adequately cover the cost of educational expansion. This gap was evident in the many deficiencies to be found in schools and teaching facilities, etc. Pedagogical practices also evolved, even though a large number of teachers continued with their old routines and practices. Modernizing didactic methodologies was a slow process and wide sectors of the teacher profession remained impervious to the changes preferring to hang onto their old methods and beliefs.

Spanish society underwent a notable change, not only in the transition to democracy but also with the development of the autonomous regions and Spain's incorporation into the European Union. The transition years were a period in which the machinery and consensus typical of democratic governments was finally finished<sup>24</sup>. This transition from Franco's dictatorship towards a parliamentary monarchy began on the 7<sup>th</sup> July 1976 with the appointment of Adolfo Suárez as president of the government. The Law of Political Reform and the first elections were held on the 15<sup>th</sup> June 1977, in which the party Unión de Centro Democrático (UCD) was elected and led by Adolfo Suárez. This opened up the path to democracy. The most significant changes took place between 20<sup>th</sup> November 1975 and 6<sup>th</sup> December 1978. Two highly significant dates in Spain's history: the death of the dictator and the approval of Spain's Magna Carta, the 1978 Constitution. This Constitution, after forty years of military dictatorship acted as the arbitrator in negotiations between different political groups. The consensus reached in the Constitution contributed to overcoming political dogmatism and helped to achieve real democratic change<sup>25</sup>. In this stage, transitory changes and adaptations were made from a dictatorial regime to a democratic one. Spain in the transition years was similar to other European countries, though with specific problems, like the amnesty for political prisoners or the implementation democratic legislative processes. There was also a notable role played by students through their struggle against Francoism and in defence of democracy, which also led to change in Spain's classrooms<sup>26</sup>.

<sup>24</sup> M. Puelles Benítez, *Elementos de política de la educación*, Madrid, UNED, 2004, p. 70.

<sup>25</sup> T. González Pérez, *La formación de maestros durante la transición y restauración democrática (1976-1986)*, «Revista Interuniversitaria de Formación del Profesorado», n. 76, 2013, pp. 15-27 (see p. 31).

<sup>26</sup> J.C. Hernández Beltrán, *Política y educación en la transición Democrática española*, «Foro de Educación», vol. 6, n. 10, 2008, pp. 57-92 (see p. 83).

The responsibility of public institutions in expanding education and achieving schooling for everyone was a significant event that ensured progress in the last two decades of the 20<sup>th</sup> century. Spain, like its neighbouring countries, has built up an education system through the actions of public institutions. Not until the early years of democracy was all-inclusive schooling achieved or teacher-student ratios reduced. Additionally, the public education system was strengthened and there were signs of innovation in schools in Spain. The period of the transition marked a before and after, with agreements and consensus that helped resolve the diverse problems that affected the Spanish education system. Political and social pacts in 1977 gave the necessary boost to transformations that have now led to a high-quality education system.

The General Law on Education underwent various reforms and counter-reforms during its two decades in force. This Law was the forerunner of future democratic educational models and represented the best educational project for contemporary Spain. The consideration of education as being a permanent task is stipulated in the Law's articles, as well as being one of the cornerstones of this law<sup>27</sup>.

However, the Ministry of Education teams that worked on the reform introduced modifications that were, on occasions, incoherent. Among school teachers, for example, some modifications generated resistance. One novelty of the Law was to assign further training of teachers to the *Institutos de Ciencias de la Educación* (Institutes of Educational Sciences), to promote continuous teacher training at all education levels, although no positive outcome was noticed from this particular innovation. The public administration and institutions involved in developing the law often forgot that their bureaucratic proposals were a long way from everyday school life. A large part of schools' empirical culture was miles away from the changes and proposals being put forward: the political culture did not take the teaching profession into account. Many teachers still held onto traditional teaching practices and resisted programmes of change or new strategies that had been put together in the upper echelons of power: the result was that any intended metamorphosis was not easy to achieve. Substituting old teaching habits with new ones is always a hard task; a fact which was not taken into account when implementing the Law<sup>28</sup>.

<sup>27</sup> M. Puelles Benítez, *Educación e ideología en la España contemporánea*, Madrid, Editorial Tecnos, 2010, p. 438.

<sup>28</sup> M. Puelles Benítez, *Las grandes leyes educativas de los últimos doscientos años*, «CEE Participación Educativa», n. 7, 2008, p. 11. Regarding this, Manuel de Puelles stated that «Failures were not attributable so much to the conception of the law rather to its implementation. This provides a clear indication that in educational reforms implementation is as important as their theoretical design».

### 3. *The path of an undervalued profession*

Throughout time and in all cultures, teachers have played a crucial role in society. However, socially, the teaching profession has not been sufficiently recognized. Giving a voice to the real protagonists of education is a debt that all teachers have incurred with their predecessors. Studying the teaching profession of the past offers a wide range of opportunities for dialogue about the past and present, ways of viewing problems and theories, as well as methodological proposals for research and interventions. Nowadays, with an ever more globalized world, recognizing the diversity and emergence of greater knowledge about different ways of teaching gives us an opportunity to encourage reflection on gender asymmetry and go beyond hegemonic horizons to deal with feminine and masculine issues<sup>29</sup>.

In Spain, female teachers, similar to other parts of the globe, played a decisive role in educating new generations, helping to raise the population's cultural level and also in the process of socialization and transformation towards democratic values. The educational work of women has transformed and enriched education. This is not a new female phenomenon, since women have always been educators<sup>30</sup>. Although tradition and androcentric cultures (which despite evolving, still remain deeply rooted in society) have ignored this reality, the value of female pedagogical work has been present throughout the history of education. Androcentric attitudes have ignored this role played by women and pigeon-holed them according to traditional stereotypes. The «masculinisation of thought» has affected the construction of identities, that is, our specific models of men and women. It is necessary to review old problems to face new ones from different perspectives, starting from the fact that we live in a sexed society, where we accept the differences and equalities between sexes. School curricula have been developed using the parameters of an androcentric model of knowledge; therefore the inclusion of female knowledge is essential for any transformation to take place. The incorporation of female knowledge and experience in school curricula would contribute to creating a scientific culture that would build new identities of femininity and masculinity. It would also show students new values, codes and feelings different from those that have traditionally been attributed to each sex, even though human acts are always sexed, i.e., based on gender identity. In addition, students should learn how to evaluate without discriminating the contributions and actions of women and men, and to have a more appropriate and realistic view of the world. Considering these principles as essential in education guarantees the

<sup>29</sup> S. San Román Gago, *La feminización de la profesión: identidad de género de las maestras*, «Journal of Asociación de Sociología de la Educación (RASE)», vol. 3, n. 3, 2010, pp. 376-387.

<sup>30</sup> M. García, A. Calvo, T. Susinos (edd.), *Las mujeres cambian la educación. Investigar la escuela, relatar la experiencia*, Colección Mujeres, Madrid, Narcea, 2008, p. 29.

constitution of co-educational schools<sup>31</sup> and the achievement of education that is non-discriminatory scientifically, non-sexist and unmarked by gender perspective<sup>32</sup>. Even nowadays, educational practices and curricula materials need to be modified to incorporate a gender focus<sup>33</sup>.

Female knowledge has always been on the academic periphery, the LGE (General Law of Education) abolished specific subjects for girls related to domesticity. Classroom areas, study programmes and teaching were all unified for boys and girls, but academic culture continued, all too often, to ignore the girls. Female students had to demonstrate their scientific and intellectual abilities, they had to demonstrate their aptitudes successfully and their value to gain access to the teaching profession.

Teaching, though a traditionally female career, has not escaped from the patterns of sexual inequality that reproduce discrimination, despite «pseudo-modern» discourses that have praised the principle of equality, maintaining inequality<sup>34</sup>. Roles, gender division of work, language, attitudes, curricula materials, in general the academic culture has ignored women and made them invisible. In schools, girls were educated following the “boys’ curriculum” and female teachers were trained using the generic programme for male teachers<sup>35</sup>. Changes in attitudes have been slow and have only been achieved through imposition of laws. Widespread access to education by female teachers and students in the 1980s led to changes and awareness that education needed to be transformed using non-sexist guidelines and authentic co-education. In this decade, women represented 50% of students of baccalaureate and a decade later they represented 50% of university students<sup>36</sup>. This reflects the evolution in women’s education and began a period more in keeping with the times and in tune with democratic principles and laws<sup>37</sup>.

Professional training for potential teachers involved a 3-year course in pedagogy and science. However, in the training process, more time was devoted to addressing deficiencies in students’ general culture than to pedagogical or teaching practices<sup>38</sup>. The concept of teaching training normally refers to initial training, even though there are training opportunities throughout teachers’

<sup>31</sup> M<sup>a</sup>E. Simón, *La igualdad también se aprende. Cuestión de educación*, Madrid, Narcea, 2010, pp. 112-127.

<sup>32</sup> *Ibid.*, pp. 130-179.

<sup>33</sup> *Ibid.*

<sup>34</sup> García, Calvo, Susinos (edd.), *Las mujeres cambian la educación. Investigar la escuela, relatar la experiencia*, cit., p. 29.

<sup>35</sup> M. Subirats, *¿Coeducación o escuela segregada? Un viejo y persistente debate*, «Revista de la Asociación de Sociología de la Educación», vol. 3, n. 1, 2010, p. 144.

<sup>36</sup> Flecha García, *Desequilibrios de género en educación en la España Contemporánea: causas, indicadores y consecuencias*, cit., p. 53.

<sup>37</sup> García, Calvo, Susinos (edd.) *Las mujeres cambian la educación. Investigar la escuela, relatar la experiencia*, cit., p. 33.

<sup>38</sup> González Pérez, *La formación de maestros durante la transición y restauración democrática (1976-1986)*, cit., p. 36.

professional careers (“lifelong learning”). The strategic error was to consider that “recycling projects” – as they were called – or rather updating, directed by the administration could lead to the desired metamorphosis of teaching practices. The empirical guidelines for teaching ended up imposing their logic, product of the symbiosis between the school practices and the adaptations that teachers made to the reforms and theoretical models. Teachers developed their own versions of the reform in classrooms in response to the forgetfulness and ignorance of the administration of educational methodology and teachers’ ethos. The culture of the teacher training colleges versus teachers’ beliefs, regarding education, created a culture that determined the regulation of teaching practices. Any strategy of change should be oriented towards transforming teachers’ attitudes and their pedagogical routines. To innovate in schools, it is necessary to change didactic methods and ways of teaching<sup>39</sup>.

Teaching graduates improved their status with their university qualifications in a changing educational panorama in which change was mostly resisted. There were, however, some teachers committed to teaching “beyond” the classroom. In their work, teachers were facing new situations arising from the political and social changes that occurred in a country in the middle of a transition towards democracy. Even though sexist roles and traditional values persisted in this polemic context, students needed to be prepared for democracy and that preparation was novel to them. There was no tradition in democratic models except for the Republican interregnum.

#### 4. *Gender Differences: The role of female teachers*

The role of female teachers was confused with that of conservative women, because education was feminized and linked to the care and attention of children. The educational and social reality for women had many common elements. Female teachers have always been identified as being cultured with a wide range of knowledge and characters associated with a series of ethical values. Society presents and verbalizes the discourse of female teachers as being erudite and learned; which was the case in many Spanish villages, still submerged in ignorance. Female teaching models that people adopt do not always relate to the profile that the administration or educational policies design: society, itself, perpetuates the expectations and ways of what a female teacher should be.

<sup>39</sup> Despite being considered a traditional professional group, female teachers were more receptive to new ideas. Both during initial teacher training as well as when teaching, the interviews suggest that female teachers were always ahead. On occasions, they provided information and helped their male colleagues with tasks.

The unification of the curriculum established by the General Law on Education (1970) did not mean that there was equality in training or education. Neither did it lead to a transformation in the attitudes of teachers or of their families. Some of the traditional ways of teaching were overcome, but a large part of school practice continued under the same routine and discipline as before, especially as schools were still supervised by inspectors, who were guardians of the old ways. A teaching profession that had been moulded by an authoritarian regime found it difficult to adapt to new ways. The gestures and rhetoric that made up the educational rituals of old regime continued during the transition. The rigid way of thinking began a slow process of flexibilization.

Gender, as all historical and social constructions, has been modified over time. In the construction of gender, the interpretations that institutions make of what men and women should be are influential. The characteristics of male hegemony promoted by educational institutions, as well as their relations with the national education project have all led to this type of ideal masculinity. Students adopted these discourses and the practices related to this construction of gender. The hegemonic model was made up of characteristics that legitimized patriarchy. Furthermore, not all characteristics were valued in the same way by social groups, despite occupying the same social space and historical period, giving rise to the appearance of variations in the model.

Institutions have played a key role in the composition of gender and in the projection of changes that gender has experienced over time. Through laws, regulations, guidelines, educational models and the Feminine Section (Institution responsible for promoting traditional female behavior), Franco's regime promoted an archaic female stereotype of women as being demure and submissive, and excluded them from all public life. The only authorized places for women were the home and with the family. One of Franco's laws gave men dominance and regulated the compulsory dependence of women. Converted into subordinates, without rights, regulated to forced domesticity at home, women were obliged to remain under masculine tutorship without their own identity. The political rights and social conquests achieved during Spain's Second Republic were systematically diminished and rejected. Women had no presence in the public arena, in paid work, in politics or in culture, except in certain professions related to the care and attention to family, among which was teaching<sup>40</sup>.

In the 1978 Constitution, in Article 14 (Title I. Fundamental Rights and Obligations. Second Chapter Rights and Freedoms) equality between sexes is stipulated «spaniards are equal before the law without any discrimination prevailing for reason of birth, race, sex, religion, opinion or any other condition,

<sup>40</sup> P.Toboso, *Las mujeres en el siglo XXI: igualdad jurídica y discriminación cotidiana*, en P. Pérez Cantó, *De la Democracia ateniense a la Democracia paritaria*, Barcelona, Icaria Editorial, 2009, pp. 213-216.



personal or social circumstance». Equality became a constitutional mandate, but the everyday reality was quite distinct. Discrimination was a naturalized part of life. In successive legal reforms, equality was included, but this principle was often violated by beliefs, obstacles or social prejudices<sup>41</sup>. The judicial system could not resolve inequality and discrimination issues, especially after decades of promoting a sexist education. The attitude of society held onto the traditional ways and customs and was not receptive to modifying their ways of thinking or behaving. Feminist groups mobilized, but female teachers, in general, were not involved. It took years of demonstrations to have their voices heard; only a small group of teachers took part while most remained distant. Their critical awareness was far from their awareness of being women and their rights as such; in fact they often maintained the status quo. However, women's involvement on a professional level was much greater and they were very receptive to new knowledge, didactic and methodological innovations. Traditional roles are social constructions and the role of female teachers was confused with the role of a female conservative.

Some female teachers participated in movements of pedagogical renovations, contributing to modernizing teaching methodology as well as becoming involved in gender demands. Female teachers were more involved than their male counterparts in training courses, perhaps because male teachers were linked more to politics, trade unions and private firms<sup>42</sup>. Female teachers were more stable, whereas the male ones applied themselves to other jobs, such as teaching in private schools, accounting or administration. Women, however, were completely devoted to education: they did not diversify their work, maintaining academic rigor. They were noted for being serious, committed professionals and energized the teaching environment despite being conservative in other aspects. Among themselves, female teachers were cooperative and open to new didactic methodologies and innovations<sup>43</sup>. This contrasted with their everyday lives, which were rather traditional: they were conformists lacking other horizons. It is true that when they were overwhelmed by problems, like poor destinations, they looked for strategies to improve their professional position. However, few tried to widen their personal aspirations beyond their profession; they did not

<sup>41</sup> *Ibid.*, p. 217.

<sup>42</sup> Some female teachers interviewed remember how they attended training courses to learn new methodologies having to overcome domestic difficulties with the help of other women in the family. Normally, the family responsibilities and the attention and care of children fell to the women. On occasions, they did not finish the session because they had to leave, as it was time for dinner and to put the children to bed. Women took on the majority of the daily domestic tasks and family care. There was little willingness from husbands to help by giving up their rest time. The work-life balance with a family was a distant dream.

<sup>43</sup> Female teacher trainers from this period inform that the women teachers were very enthusiastic and motivated to learn new methodologies of learning. Their attendance at courses was always higher than the male teachers. Male teachers were less involved in the process of learning and were less dynamic.

awaken their critical conscience to the times in which they lived, though on occasions they reacted against those who dared to disagree with them.

The contrast of their professional life with their domestic one was surprising. They attended courses, they overburdened themselves trying to improve professionally, but they continued being submissive and maintaining their traditional role, convinced it were the right thing to do. Female teachers were busy with household tasks without being able to see other horizons<sup>44</sup>. However, they stood out for their actions and for their active participation in group meetings. Historians tend to indicate that the main obstacle for female teachers to join a trade union or become involved in politics was their dedication to their families (dual tasks), their scarce political commitment or their attitudes of the time. These arguments that they were a conservative profession are insufficient, as they do not explain their high participation in other areas like professional associations or NGOs.

As well as the above, there was another notorious variable among female teachers: their marital status. Married female teachers were much more tied to the old ways than single ones. Social limitations and conventions marked the older women teachers. The younger ones had trained under the study programme outlined in the General Law of Education and were open to new ways of teaching and learning. Plus, there were far greater opportunities in democracy for actively raising awareness of the endeavours of women. Feminist movements and pedagogical renovation groups denounced any evident inequalities, providing a more favourable climate for collective projects.

In summary, a large number of women teachers did not show much awareness of the social changes around them; they accepted the events that were taking place without any questions. The transitional processes were seen as a natural evolution, observing their loss of being protagonists in school classrooms to educational innovations. A large segment of female teachers simply maintained the system in force at the time, conformists, resigned with a spirit of sacrifice. These teachers were attached to the rigidity of rules; they were teachers who taught as they were taught; they were stuck in the old ways, used to being admired and respected: they did not understand the reasons why they had to change their behaviour. These teachers acted with little academic rigor, but with strict discipline and intransigence. Social representations of gender differences were based on masculine superiority, and these teachers defended femininity in the profession so as not to break with tradition. They thought that

<sup>44</sup> One of the female teachers, who was a teacher trainer, remembers vividly the behavior of other women teachers who attended her training courses. According to the comments she heard, the matrimonial dependence of the women was very obvious at that time: «My husband doesn't let me come», «my husband doesn't want me to attend the course because it is late at night», «I have to go early to look after my family», «I need to lay the table», «my child is ill and grandma is looking after them, I have to go and pick her up», «I am late because I had to take my child to the doctors», «I had to go to the supermarket and I got held up»... female teachers took on all the domestic burdens.

men had other professions to carry out and that women had the right qualities to be teachers.

However, progressive female teachers were an entirely different group, who considered that it was important to leave the dictatorship behind to open up a space for democracy and transform society. They had different attitudes towards change and supported the need to adapt education to the new social circumstances. Despite their discredited professional status resulting from an underestimation of the work of female teachers, this group tried to promote a transition towards more flexible ways of thinking and acting. They were teachers who were fighters and very active, they resisted the old norms and mobilized in support of their demands. These female teachers were the protagonists in the reforms to modernize education and to create a dialogue with the new times. They were open to new learning styles and didactic innovations. The younger sectors of the teaching profession, who had benefitted from the initial training in the 1971 Study Plan, played an important role in this unique period of Spanish history.

There are still some female teachers working from the 1967 Study Plan, though most are retired. The generation of 1971 Study Plan are between the ages of 45 and 65 years old. Some of them are close to retiring or have taken early retirement, others are younger, but all of them have a wide experience of teaching. The teaching profession is not a totally homogenous group; age tends to draw the lines between the more traditional and conservative groups compared to the other more progressive ones. Obviously, the more traditional groups consist of those teachers who studied over 40 years ago, when higher education was not accessible to all social classes or to all women, as social and gender inequalities were still very present. Regarding the gender variable, female teachers have, in historical terms, become the main protagonists in school teaching. It is interesting to note the increasing feminization of teaching from the early years of the 1970s, with female teachers representing 60% of the total; a figure which has continued to increase and has now reached 75%<sup>45</sup>.

##### *5. Innovation and changes. Reforms from another perspective*

The older professional profiles have hampered the reforms by resisting the new educational methodology. It has clearly been a strategic error not to consider the important influence of tradition when it comes to implementing reforms. The failure or success of educational reforms is often conditional on the teaching profession. In this case, the language of reforms; the terms used; the

<sup>45</sup> San Román Gago, *La feminización de la profesión: identidad de género de las maestras*, cit., p. 378.

new nomenclature, very distinct from the traditional educational vocabulary blocked their efficiency because the meaning of these terms was unknown. The legislative jargon was not in tune with practical classroom culture or the terms commonly used by teachers. The theoretical discourse of civil servants interjected into classroom practice. Many teachers perceived the technical proposals from the government as being abstruse. Others collaborated and participated in innovations, especially female teachers, who were more willing to incorporate new methods of learning and teaching.

During these years, new generations of teachers joined the profession from diverse social groups. A significant number came from families that had no education nor even been to school, both from rural and urban areas. Social changes and economic improvements facilitated access for working class families to universities. This diversification led to greater social mixing in educational institutions. Professional expectations and social advancement influenced promotion and access to careers. Academic profiles, changes in status, renovation of teaching practices together with new social demands all influenced the transformation in the education system. With the application of the new law and the 1971 Study Plan the old teaching practices were gradually left behind, the generation of teachers was renewed and new pedagogical strategies were applied. Continuous training of the most active sectors of teachers allowed advances to be made and more reluctant teachers to be persuaded. Thus, educational practices became ever more flexible.

The renovating potential of new educational movements during the final years of the dictatorship was an alternative to the official, obsolete school system of the time. Many teachers joined groups involved in educational renovation and worked overtime to do extracurricular innovative activities. These professional groups shared school experiences and were permanently in active training. They were the ones who collaborated in building an active, cooperative, democratic and supportive public education system. Among their objectives, they proposed to study and practice new methods of school organization, new pedagogical methods and techniques to achieve an education that was based on freedom, cooperation and solidarity. These activities were very much in tune with the new schemes of the democratic society<sup>46</sup>.

This experience “from the bottom” later helped to promote change “from the top”. The educational administration wanted to energize teachers by introducing new habits, a process in which female teachers were often the most innovative. There was a turning point in the way of looking at education to such a degree that even the teaching sector most attached to the old school routines began to modernize and use new didactic methods. Despite the oversight and

<sup>46</sup> A. Costa Rico, *Los movimientos de renovación pedagógica y la reforma de la educación en España*, in P. Celada Perandones (ed.), *Arte y oficio de enseñar: dos siglos de perspectiva histórica*, Madrid, Sociedad Española de Historia de la Educación, 2011, pp. 89-98.

ignorance by the public administration of educational routines and teachers' ethos, female teachers responded to the reforms. It is true they were larger in number but they were also more assertive than their male colleagues in this aspect.

The reforms to restore democracy to Spain unfolded. However, the convergence of the traditional aspects of school culture persisted: politics, theory and practice. From a pragmatic perspective teachers and teacher trainers continued with the didactics linked to the teaching profession. Trainee teachers received a preparation conditioned by external culture both at a pedagogical and political level: one that was governed by the regulations that represented the modern bureaucracy. The knowledge and policies that the reforms promoted incorporated the new pedagogical thinking that the system required. The teaching profession was restricted by the changes in school culture that affected their praxis, adopting new values and terminology that limited, to a certain degree their autonomy, a perception that led to discomfort and unease among teachers. In addition, there were the 1982 Renovation Programs that implemented other modifications in the educational system<sup>47</sup>.

The authority in charge of General Basic Education adapted school programs to the new reality in Spain. Thus, in 1976, it published the regulations and implemented the modifications of an ideological and psycho-pedagogical nature in school curricula<sup>48</sup>. It renewed approaches and methodological guidelines, at the same time as giving instructions to teachers to promote democratic values with students. There were diverse regulations in these years known as Renovating Programmes. The Royal Decree 3087/1982 of the 12<sup>th</sup> November (BOE, 22-XI) completed the renovation of curricula in Social Sciences, Spanish Language, Natural Sciences and Technology, Foreign Languages, Religion or Ethics, Physical Education and Artistic Education setting down objectives and basic concepts. Methodologies, promotion of students, assignation of teachers to different subjects and the figure of a class tutor were some of the areas of innovation<sup>49</sup>. The programmes of renovation structured curricular design in cycles: initial cycle, middle cycle and higher cycle. The cycles offered greater unity in the educational process; they were a way of planning and organizing content<sup>50</sup>. Curricular design was prescribed from the top levels and teachers had to apply it to the reality in the classroom. Thus, the role of teachers was limited to adaptation<sup>51</sup>. This is why there was little collaboration with some

<sup>47</sup> González Pérez, *La formación de maestros durante la transición y restauración democrática*, cit., pp. 37-38.

<sup>48</sup> The law was published in the BOE 29-XI-1976 y 29-VII-1977 initially it was on a trial basis; the following year it was ratified as definitive according to BOE 13-X-1978.

<sup>49</sup> R. López Martín, *La escuela por dentro. Perspectiva de la cultura escolar en la España del siglo XX*, Valencia, Universidad de Valencia, 2001, p. 204.

<sup>50</sup> *Ibid.*, p. 205.

<sup>51</sup> *Ibid.*, p. 207.

programmes in which they had no say; there were further modifications with the introduction of New Orientations, which also led to new demands on teachers. The lack of information and guidance for the methodological innovations led to limited collaboration by some female teachers<sup>52</sup>. However, in general, they got more involved than their male counterparts despite their responsibilities in their private lives. Innovation and experimentation was not paid much attention, except in isolated cases. The pedagogical renovation and the quality of education were two issues that were still pending.

Education for democracy was an urgent subject, the acquisition of knowledge and practice was fundamental and at the same time a priority, since to consolidate the new democracy a population educated in democratic values was needed. The democracy as way of life, civic values, solidarity dialogue, co-existence, etc., required the participation of all the elements that make up an educational system. The importance of having teachers adopt these values should be underlined, though it was not easy for them having received authoritarian training and being educated under conservative and rigid values.

The application of the General Law on Education represented an advance, but among the teaching profession it led to misgivings because of the unknown nature of the law and the changes it required. This was a law that was a prelude to the political changes and there was no option to go back. The improvement in the economy and in society and the development of a middle class helped make the transition more flexible and open to new ideas. It forged an attitude in favour of a democratic society.

### *Final considerations*

The Spanish educational system has always been restricted by the politics and politicians in power at any given time. Educational laws have often been utopian, they have attempted to change teachers' attitudes and modify teaching practices through the imposition of legislation. However, an analysis of the situation suggests that there has not been a clear teacher training policy and that during teacher training, teachers did not learn how to transmit knowledge. The updating of courses and seminars did not resolve the gaps in training and the needs of teachers. A combination of relevant learning through the integration of knowledge and experience is required. It is true that there has not been a firm and sustained policy of initial and continuous training for teachers in Spain, although there have been important attempts. However, teachers' identities, beliefs and professional practices have been ignored, which has led to misunderstandings with educational policies. The implementation of laws

<sup>52</sup> *Ibid.*, pp. 211-212.

of educational reforms has not been in parallel with the professional cultures of the different generations of teachers. Practice and theory, therefore, should form an indissoluble unit. Furthermore, the gender perspective and female experience should be incorporated.

The omission of teachers in educational reforms has often led to these reforms being ineffective, and this is what happened with the General Law of Education. Nevertheless, the educational reform promoted by this Law built a teaching model that influenced the conception, values and beliefs of education. Since the 1971 teacher training programme, the feminization of primary school teaching has been progressive. With the exception of the early graduates of this programme, there has been an increasing majority presence of women in the early stages of education.

Advances made in research into gender roles are prone to certain gaps. From the 20<sup>th</sup> century to the current day, the lives of female teachers, the recognition of their contributions, the impact and repercussion of their studies and their difficulties have been little investigated. There has been silence and omissions to make their work visible, because their lives have been subjected to androcentric shackles. Female teachers, apart from being part of a traditionally conservative profession were severely limited by their surroundings. Historical references full of prejudices highlight the effort that must have been required by women to enter the labour market, in this case the teaching profession and overcome the obstacles to gain access to teacher training and a modern education.

To explore the past of female teachers helps us to identify the continuities and breaks in the political-pedagogical field. Rescuing these memories is of great relevance because it makes us reflect on the teaching practices of today. Rummaging into their actions and in the resonance of their pedagogical discourses, we are encouraged to review their inheritance and legacy. The first generations of teachers that graduated with university diplomas had to teach during a complex time. Following the death of the dictator, the minds of many Spaniards were filled with the fear of change, with an underlying concern of reprisals. Female teachers committed themselves to new educational schemes and some dared to innovate. It should be noted that their careers were not exempt from struggle, misunderstandings and opposition in the historical-political context of the period. The attitudes of the pre-democratic period conditioned behaviours and beliefs. Spanish society at that time had been built on ideas based on masculinity and restrictions on women.

This overview shows a sexist itinerary marked by the cultural barriers of conservatives. The contradictions in the construction of an equal educational model persisted in the conceptualization and practice of an education system grounded in different roles. Although the peaceful transition from a dictatorship to constitutional monarchy implied the reformulation of principles of equality; equality was not widespread. However, the evolution of the new Law in a democratic framework led to changes in behaviour and promoted

the participation of teaching profession and energized the education system. The modernization of the Spanish education system has opened up new paths helped spread culture and policies of equality.



# Per una storia del sistema educativo dall'Impero Ottomano alla Turchia contemporanea

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*Brief History of Educational Policies from the Ottoman Empire to Contemporary Turkey*

**ABSTRACT:** The essay offers an historical analysis of the educational system in Turkey from the Nineteenth century to the present day, showing development, changes of perspective and instances of reform. Such a process is strictly linked to national policies and their general impact on social dynamics. The transition from an Ottoman educational conception, with deep references to religious tradition, to a secular approach – directly inspired by European programs – has fundamentally altered the *curriculum* with a series of challenges. Most recently, a new approach is evident in the light of the international guidelines for educational integration and in a context of geopolitical reformulation of regional equilibrium.

**EET/TEE KEYWORDS:** Educational Policies; History of Turkey; History of the Ottoman Empire; History of Education; International Relations; XIX-XXI<sup>th</sup> Centuries.

## *Introduzione*

I paesi musulmani hanno una ricca tradizione educativa con un preciso riferimento religioso<sup>1</sup>. Il concetto stesso di conoscenza *'ilm* nasce e si sviluppa

<sup>1</sup> «The impetus for education was a combination of a religious quest to understand the will of God in order to fashion personal and collective life in its light, a search for useful knowledge to run empires, and the attraction of Hellenistic, Persian, and Indian intellectual heritages. The educational traditions of Muslims provide an impressive example of the movement of ideas across human cultures. The pedagogical writings of Muslims owed much to the Hellenistic tradition. In turn, the ideas and practices of Muslims made deep imprints on medieval European scholastic

in una caratterizzazione a sfondo teologico<sup>2</sup> senza la quale sarebbe impossibile comprendere la funzione educativa di alcune istituzioni storiche quali le scuole coraniche<sup>3</sup>. Sembra opportuno qui presentare una prima suddivisione. Al livello elementare le *mekteb* svolgevano il prezioso compito dell'alfabetizzazione primaria<sup>4</sup> tutta rivolta alla comprensione dei testi sacri, con un notevole sforzo per l'insegnamento del Corano e degli Hadith, a cui seguivano lunghi esercizi di

thought, so much that no good history of education in Europe can be written without engaging with these exchanges». Si veda F. Panjwani, *Muslim Educational Traditions*, in D.C. Phillips (ed.), *Encyclopedia of Educational Theory and Philosophy*, London, SAGE, 2014, p. 560.

<sup>2</sup> «Civilizations tend to revolve around meaningful concepts of an abstract nature which more than anything else give them their distinctive character. Such concepts are to be found at the very beginning of the civilization. Or they may signalize, when they first make their appearance, an entirely new departure towards the eventual transformation of the environment hospitable to them. In the course of time, they may undergo changes of tone and of volume. Such changes may be minor and merely serve to strengthen the hold exercised by the concepts before. But they also may provide the old concepts with new meanings. This signifies a fundamental change or a major break in the structure of civilization in which it happens. The concepts as such may continue to be used, thereby obscuring the meaning and depth of the change or even totally hiding the very fact of its existence. [...] Fortunately, there is comparatively little danger of distorting the significance of the concept of 'ilm in Islam. Arabic 'ilm is fairly well rendered by our 'knowledge'. However 'knowledge' falls short of expressing all the factual and emotional contents of 'ilm. For 'ilm is one of those concepts that have dominated Islam and given Muslim civilization its distinctive shape and complexion. In fact, there is no other concept that has been operative as a determinant of Muslim civilization in all its aspects to the same extent as 'ilm». Si veda F. Rosenthal, *Knowledge Triumphant: The Concept of Knowledge in Medieval Islam*, Leiden, Brill, 2007, pp. 2-3.

<sup>3</sup> «Education should be carefully designed to fit into the intellectual scope of the individual, and care should be taken to avoid treating everyone as though they are the same or indeed could be the same. God has created people to be different, and educationalists must respect those differences in their construction of the curriculum. The point of such differentiation in education is to protect the different categories of thinkers from interfering in each other's route to knowledge. Ordinary believers have an unsophisticated faith that helps them to maintain an ethically acceptable lifestyle, and no intervention in their behavior is required. If the philosophers were to come and start to explain what problems exist in justifying ethical standards as derivative from God, ordinary believers would become confused and possibly dissatisfied with their previously habitual behavior». O. Leaman, *Islam*, in J.J. Chambliss (ed.), *Philosophy of Education. An Encyclopedia*, New York, Routledge, 2013, p. 313.

<sup>4</sup> «For official from affluent families, education often began under the care of a slave tutor (*lâla*). The *lâla* was generally ignorant and unqualified to do more than introduce the child to certain facets of the popular culture while taking care of him. The *lâla*'s function was not without value for a child of elite family who might not otherwise acquire much of the 'common touch'; but it is not surprising that nineteenth-century intellectuals, in a era of rising expectations, commented critically on the *lâla*'s role. The formal institution for educating children was the Qur'anic elementary school (*Mekteb*). This was generally a one-room school house that adjoined a mosque and was presided over by a teacher (*boca*) from the lesser ulema. [...] Most teachers were ill-qualified. Much of the noise came from children repeating their lessons in unison, struggling to memorize everything, whatever or not they understood it. As much as rote learning, strict discipline distinguished the concept of education: not just *talim*, inculcation of rational knowledge but *terbiye*, which include character development». Si veda C.V. Findley, *Ottoman Civil Officialdom: a Social History*, Princeton, Princeton University Press, 1989, pp. 53-54.

memorizzazione e ripetizione<sup>5</sup>. Al livello superiore gli studi giuridico-teologici<sup>6</sup> venivano impartiti nelle *medrese* [madrasa] che erano in prevalenza finanziate da pie fondazioni [wakfs]<sup>7</sup>. Tale struttura educativa era sotto il rigido controllo degli '*ulamā*', i quali ne soprintendevano alla giurisdizione e al funzionamento. L'insegnamento nelle scuole coraniche è stato durante i secoli sostanzialmente omogeneo con alcune minime differenze locali nei diversi paesi<sup>8</sup>.

### *Le riforme alla fine di un impero*

Per una struttura educativa almeno in parte slacciata dalla sfera d'influenza religiosa si deve arrivare al XIX secolo grazie anche a importati flussi occidentalizzanti, provenienti specialmente dalla Francia. Sebbene vi siano stati da parte dell'amministrazione centrale dell'Impero ripetuti tentativi alla fine del secolo XVIII di introdurre nel sistema educativo ottomano alcune istituzioni più moderne e collegate direttamente all'amministrazione centrale, la svolta avvenne con la sconfitta dell'Impero di fronte alle forze europee, i cui comandi militari erano più preparati e meglio equipaggiati. L'amaro sentimento di inadeguatezza

<sup>5</sup> «Memorization of the Qur'ān forms the fundamental basis of Muslim learning and is traditionally the prerequisite for further study in the Islamic religious sciences. The process of Qur'ān memoritation provides both a specific and an idealized model of 'traditional' education, established by structures of textual transmission, orality, aurality, and memory. The social role of educated person (*ālim*) begins with the memorization of the Qur'ān. This has shaped patterns of Muslims schooling, from basic 'Qur'ānic schools' to religious colleges». Si veda A.M. Gade, *Perfection Makes Practice: Learning, Emotion, and the Recited Qur'ān in Indonesia*, Honolulu, University of Hawaii Press, 2004, p. 63.

<sup>6</sup> «Muslim jurisprudence, however, in its traditional form, provides a much more extreme example of a legal science divorced from historical considerations. Law, in classical Islamic theory, is the revealed will of God, a divinely ordained system preceding and not preceded by the Muslim state, controlling and controlled by Muslim society». Si veda N.J. Coulson, *A History of Islamic Law*, Edinburgh, Edinburgh University Press, 1964, pp. 1-2.

<sup>7</sup> «Unlike the mosques, the madrasa system allowed for the residence of teachers and students and provided a library. Normally drawing on permanent sources of income, such as a *waqf* (religious endowment) property, the madrasa provided for salaries of the faculty and scholarships for students. The main objective of the madrasas was to prepare scholars of Islam with a special emphasis on the teaching of *fiqh* (Islamic jurisprudence)». Si veda M. Bano, *Islamic Education: Historical Evolution and Attempts at Reform*, in M. Clarke (ed.), *Handbook on Research of Development and Religion*, Cheltenham, E. Elgar Publishing, 2013, p. 238.

<sup>8</sup> «One of the most literary genres in Islam, the *tabaqat* literature, though it has many specialist divisions, conforms basically a single format: it chronicles the transmission of the knowledge. Whether dealing with jurists, exegetes and experts in hadith or with all types of scholar, such work offers a diachronic realization of Islam; an assertion that the essential message is preserved, not solely within the revealed texts, but in the teaching about these texts that is transmitted from generation to generation through the ages». Si veda N. Calder, *The Limit of Islamic Orthodoxy*, in F. Daftary (ed.), *Intellectual Traditions in Islam*, London, I.B.Tauris, 2000, p. 79.

ebbe come controparte un maggiore interesse verso la formazione degli ufficiali e un avvicinamento alle tecniche e metodologie educative europee<sup>9</sup>.

Dopo la disfatta della flotta ottomana da parte di quella russa, fu fondata nel 1776 una nuova Scuola Imperiale di Ingegneria Navale [Mühendis-khâne-yi Bahri-yi Hümayün] e nel 1794 la Scuola Imperiale di Ingegneria [Mühendis-khâne-yi Berri-yi Hümayün] per la formazione degli ufficiali dell'artiglieria e dei comandi di terra. Molti testi tecnico-scientifici vennero tradotti per i cadetti che venivano formati direttamente da ufficiali francesi.

Alle scuole coraniche si aggiunsero, in questo periodo, le *ma'arif*, le quali – pur non essendo ancora del tutto secolarizzate – erano sotto la giurisdizione dello stato. Come è ben comprensibile, comunque, i maggiori sforzi e interventi furono fatti per la formazione delle reclute con l'istituzione di molte scuole militari. Soltanto sotto la dinastia di Mahmud II (1801-1839) si può veramente parlare di un rinnovamento nella struttura educativa di base. Sulla scia modernizzante del Pasha d'Egitto Muhammad Ali, Mahmud II – rendendosi conto della situazione insostenibile in cui versava l'intero impero – tentò, timidamente, una radicale trasformazione del sistema d'istruzione. In un suo celeberrimo editto si legge che «la maggior parte della gente evita di mandare i propri figli a scuola e preferisce darli al commercio come tirocinanti presso gli artigiani quando arrivano all'età di cinque o sei anni a causa delle loro ambizioni di guadagnare immediatamente. Questa condizione è causa non solo di un diffuso analfabetismo ma anche di ignoranza della religione. Nessuno d'ora in poi impedirà ai propri figli di frequentare la scuola fino al raggiungimento dell'età adulta»<sup>10</sup>. Purtroppo, come molto spesso avviene, questo editto non ebbe l'effetto sperato e non conteneva nulla di nuovo circa l'offerta degli insegnamenti e la struttura stessa dell'istruzione primaria ma fu un crocevia fondamentale per un maggiore intervento dello stato.

Alla stregua di quanto avvenuto qualche anno prima in Egitto, Mahmud II eliminò nel 1826 le forze militari reazionarie impersonate nella storica e temuta formazione dei *Giannizzeri*, che si opponevano tenacemente ad un esercito di stampo europeo più snello e moderno. Gli storici non considerano affatto secondario questo evento poiché la maggior parte delle riforme sono avvenute subito dopo questa data a testimonianza del potere esercitato nei secoli da quella tanto temuta formazione. Si deve, però, sottolineare che secondo i canoni di una tradizione comune a tutto il Medio-Oriente qualsiasi riforma nel settore dell'istruzione parte dall'alto con particolare riferimento alla fondazione di scuole e centri di specializzazione per la formazione di ufficiali, dottori,

<sup>9</sup> «Perennial wars in the 1800s with the ancient Ottoman adversary damaged the empire severely and resulted in the loss of territory and prestige. However, the series of Ottoman-Russian wars compelled the reform movement to examine the structure of the army with a view toward correcting its weakness». Si veda M. Uyar, E.J. Erickson, *A Military History of the Ottomans: from Osman to Atatürk*, Santa Barbara, Greenwood Publishing Group, 2005, p. 129.

<sup>10</sup> M. Winter, *Ma'arif*, in H.A.R. Gibb, C.E. Bosworth, *The Encyclopaedia of Islam*, Leiden, Brill, 1991, p. 903 (Traduzione nostra).

ingegneri, amministratori militari e della burocrazia civile. A tale enfasi sulla promozione dei futuri quadri imperiali non corrispondeva lo stesso impegno per la fondazione di nuove scuole elementari, in special modo nei territori più lontani dai grandi centri urbani né tanto meno per la riorganizzazione dell'offerta didattica. Si arrivò persino ad alcune situazioni di stallo in cui nelle scuole di specializzazione, a causa di una non solida cultura di base, ci si vedeva obbligati ad offrire corsi elementari di aritmetica e grammatica turca.

Durante il regno di Mahmud II vi fu una fiorente apertura di istituti di alta formazione tra cui spiccano per la loro importanza nella storia turco-ottomana la *Scuola Medica di Istanbul* fondata nel 1827, la *Scuola Imperiale di Musica* fondata nel 1831, la *Djerrah-Khāne*, altro celeberrimo istituto per la medicina interna fondata nel 1832 e una *Scuola di Giurisprudenza* fondata nel 1834, la quale si caratterizzerà per la capacità di ricezione degli sviluppi di tale dottrina negli altri paesi europei. La *Harbiyye* [Accademia Militare] fu fondata nel 1834 e modellata sull'Accademia Militare di Saint-Cyr in Francia seguendo alla lettera la tradizione francese nel campo dell'istruzione militare<sup>11</sup>. Primo tra i governanti insieme a Muhammad Ali in Egitto, Mahmud II autorizzò intorno al 1830 alcune missioni studentesche all'estero con l'obiettivo di migliorare la struttura amministrativa e quella militare. Vennero, inoltre, fondate nel 1838 la *Mekteb-i Ma'arif-i 'Adliyye* con il preciso compito di formare gli ufficiali governativi nelle scienze esatte e nel 1839 la *Mekteb-i 'Ulum-i Edebiyye* per la formazione di interpreti e traduttori. L'importanza nel panorama ottomano di queste scuole è data dal fatto che per la prima volta venivano insegnate materie quali le lingue straniere, la geografia, le scienze fisiche e matematiche moderne.

Altro importante passo in avanti fu fatto con la creazione di una nuova tipologia di scuola. Si tratta della *Rüşhdiyye* (dal termine *rüşhd* che significa «adolescenza») che aveva come missione principale quella di armonizzare il passaggio dalle scuole elementari a quelle superiori senza traumi pedagogici. Nonostante questa nuova scuola avesse un carattere secolare e moderno, il ruolo giocato dall'educazione religiosa era ancora molto forte. Per una maggiore efficienza degli istituti d'istruzione Mahmud II ebbe a cuore la formazione di ispettori e tecnici dediti al controllo e alla gestione degli affari scolastici quali espressione periferica del *Medjlis-i Umūr-i Nafi'a* [Consiglio degli Affari di Pubblica Utilità] fondato nel 1838 e del *Mekatib-i Rüşhdiyye Nezareti* [Dipartimento per l'Adolescenza] fondato nel 1839.

<sup>11</sup> «In 1835, among the reforms that were being introduced by Sultan Mahmud II (1808-1839), Prussia was again asked to lend military expertise, and Helmuth von Moltke, a young Prussian officer, was sent to act as an advisor to the Ottoman military. In 1836 the Ottomans requested and received an additional contingent of military advisors, but the mission was terminated in 1839 upon Mahmud's death». Si veda S. Chase Gummer, *Germany*, in G. Agoston, B. Masters (edd.), *The Encyclopedia of the Ottoman Empire*, New York, Facts on File Publishing, 2008, p. 229.

### *Dalle Tanzimat ai Giovani Turchi*

L'era di Mahmud II volgeva al termine con un grande sforzo nella modernizzazione dell'Impero ma con alcune contraddizioni intrinseche ben evidenti<sup>12</sup>. La costruzione di nuove scuole non andava di pari passo con la formazione di nuovi insegnanti e la didattica soffriva di una concezione fin troppo legata alla tradizione e lontana dalla realtà. Senza dubbio, comunque, non è affatto un caso della storia che l'Impero Ottomano si dirigesse verso un periodo di grandi riforme: il periodo delle *Tanzimat* (1839-1876). Quest'epoca ebbe inizio, infatti, con il famoso editto *Khatt-i Sherif* del 1839 in cui venivano promulgati i principi dell'uguaglianza tra tutti i cittadini dell'Impero senza differenza di credo religioso e si dava libero accesso alle scuole ai non-musulmani<sup>13</sup>. Questo pregevole tentativo da parte dei riformatori di integrare i non-musulmani, fino ad allora esclusi dalla gestione dello stato, ebbe come primo benefico effetto la libertà d'accesso all'istruzione.

Nel 1845 venne istituito il *Mawakkat-i Ma'arif Medjlisi* [Consiglio Generale dell'Istruzione] che di lì a poco sarebbe diventato *Mektatib-i 'Umumiyye Nezareti* ovvero il Ministero delle Scuole Pubbliche. Uno dei maggiori meriti del nuovo dicastero fu quello di unificare i programmi e la didattica per tutte le *scuole elementari* dell'Impero: impegno non di poco conto viste le differenze fin troppo evidenti nei diversi territori. Meritano la nostra attenzione, inoltre, i tentativi fatti da parte di due tra i maggiori riformatori 'Ali e Fu'ad di riorganizzare l'intero sistema educativo dalle scuole elementari sino all'istruzione superiore con un piano tanto ambizioso quanto irrealistico per l'epoca. Anche se durante il regno di Mahmud II vi fu un tentativo di istituire scuole statali per la formazione degli insegnanti, si deve solo all'epoca dei riformatori la fondazione di una struttura dedicata soltanto a questo compito: nel 1848 infatti fu aperta la *Dar al-mu'allimin* a Istanbul.

<sup>12</sup> «Before the Tanzimat, Mahmud II had established the idea of Osmanlilik (Ottoman Unity) to make strong friendship between Muslim and no-Muslim communities, and he made considerable progress in changing the comprehension of religion in the Ottoman state. With this application, Mahmud II had been aiming to prevent the rapid disintegration and to end the opposition among the Ottoman minority communities as well as to reinstate close friendship between all levels of society». Si veda M. Demirel, *Construction of Churches in Ottoman Provinces*, in C. Imber, K. Kiyotaki, R. Murphey, *Frontiers of Ottoman Studies*, New York, I.B. Tauris, 2005, p. 214.

<sup>13</sup> «The decree also sought to inaugurate an age of progressive social, political, cultural, and economic development. By positing two social ideas with 2 very different orientations – the religious and the secular – the Hatt-I Sharif created the potential for a series of conflicts in ethics, personal and social identity, cultural orientation, and political goals. The confusion engendered by a double standard – an Islamic code of behavior and a European or 'modern' secular standard of action – served as a powerful inducement to create situation ethics. Individuals or groups could manipulate each new situation, and the person or group could explain the result by one or the other, both standards depending upon the needs of the moment». Si veda J.J. Reid, *Crisis of the Ottoman Empire: Prelude to Collapse 1839-1878*, Stuttgart, F. Steiner Verlag, 2000, p. 87.

Nel 1851 fu fondata la *Endjümen-i Dānish*. Quest'ultima istituzione, organizzata come una società con "filiali" sul territorio, aveva il preciso compito di formare personale che potesse contribuire alla valorizzazione della cultura ottomana e risolvere l'annoso problema della penuria di insegnanti, specialmente nelle zone montuose e nelle campagne anatoliche. Sfortunatamente non ebbe molto successo e la situazione dell'Impero si mostrava molto disomogenea tra le grandi città e il resto dei territori, ancora profondamente legati alle istituzioni private e religiose. Nel 1857 il Ministero per le Scuole Pubbliche divenne Ministero della Pubblica Istruzione con una maggiore autonomia di gestione delle risorse. È di questi anni la nuova organizzazione del sistema scolastico in cui è evidente un compromesso tra le istanze riformatrici e la tradizione: una scuola elementare [mekteb-i sibyan] della durata di quattro anni (7-10 anni) e una scuola secondaria [*rüşhdiyye*] di sei anni (11-16 anni) da cui gli alunni avevano la possibilità di continuare in altre istituzioni di istruzione specialistica. Per la formazione degli amministratori civili dello stato venne fondata nel 1859 la *Mülkiyye*<sup>14</sup>.

Quando nel 1868 fu istituito il *Consiglio di Stato* sull'analogo modello francese, una delle cinque sezioni dello stesso si occupava dell'agricoltura e della pubblica istruzione. In quello stesso anno, venne promulgata un'importante legge sull'obbligo scolastico secondo la quale tutti i bambini tra i sette e gli undici anni e le bambine tra i sei e i dieci anni dovevano ricevere un'istruzione elementare e frequentare la scuola. Nel 1868 venne fondato il *Liceo di Galata-saray* in cui veniva proposto un curriculum di stile europeo durante cinque anni di corso a studenti e studentesse di tutto l'impero e di ogni credo. Quest'istituzione andò oltre il tradizionale divieto di educazione mista aprendo le porte all'emancipazione. All'inizio il corpo docente e amministrativo era in prevalenza francese, poi con il passare degli anni divenne un baluardo della cultura turca.

La maggiore attenzione dell'apparato centrale ai problemi dell'educazione porta alla creazione nel 1869 di un *Alto Consiglio per l'Istruzione* all'interno dello stesso Ministero dell'Istruzione Pubblica in cui avevano rappresentanza anche i non-musulmani [milletts] presenti sul territorio dell'Impero<sup>15</sup>. Frutto

<sup>14</sup> «New Ottoman schools like the *Mekteb-i Mülkiye*, the famous School of Administration that opened in 1859, contributed not only to the creation of a new elite in the Ottoman Empire but also to the formation of elites in the new states that were created later, such as Turkey, some Arab countries and Albania». Si veda N. Clayer, *The Albanian Students of the Mekteb-i Mülkiye. Social Networks and Trends of Thought*, in E. Özdalga (ed.), *Late Ottoman Society. The Intellectual Legacy*, New York, Routledge, 2005, p. 289.

<sup>15</sup> «Ultimately, the process of becoming a model Millet was fraught with contradictions: as a Ottoman Jew attempted to teach other Ottoman Jews how to become imperial citizens, they instilled in them the values of love of homeland, serving the greater good, and brotherhood (or less frequently, sisterhood) among Ottomans of all faiths. Yet, as they sought to prove the authorities and to the Muslims of the empire that they were a model community with a special relationship to the state, they simultaneously competed with other groups for the attention of their government. Gaining visibility brought new complications. On the one hand, moving into the spotlight meant

di questa istituzione, che portò a conoscenza del governo centrale le immense difficoltà nella promozione dell'istruzione – in territori così lontani e diversi per caratteristiche geografiche, climatiche e culturali – fu la creazione dei *Consigli Provinciali per l'Istruzione* i quali svolgevano, in subordinazione al Consiglio Centrale, un ruolo di controllo, informazione e promozione culturale. Per favorire una maggiore razionalizzazione del comparto educativo, la legge del 1869 sull'istruzione pubblica istituzionalizzò gli sforzi fatti nel periodo precedente e tentò di colmare le lacune presenti in alcuni territori. I legislatori si erano chiaramente ispirati alla legislazione europea contemporanea e alla legge sull'educazione promulgata in Egitto nel 1867.

Come era avvenuto per le scuole elementari, nel 1870 un editto unificò i programmi didattici delle *Rüşdiyye* con alcune novità degne di nota. Oltre al fatto che si classificavano le scuole in pubbliche [*'umumiyye*] e private [*khususiyye*], si operava un'ulteriore suddivisione degli ordini e gradi scolastici: scuola elementare [*sibyaniyye*], scuola elementare di secondo grado [*rüşdiyye*], scuola secondaria di primo grado [*i'dadiyye*] e scuola secondaria superiore [*sultaniyye*]<sup>16</sup>. A quest'ultima seguivano i centri di alta specializzazione in ingegneria e scienze tecniche, in scienze agricole o per la formazione dei futuri docenti. La legge prevedeva la costruzione di una scuola elementare per ogni villaggio o quartiere cittadino, una *rüşdiyye* in ogni città con più di 500 famiglie, una *i'dadiyye* laddove vi fossero più di 1000 famiglie e una *sultaniyye* in ogni capitale provinciale. Purtroppo la mancanza di fondi, infrastrutture e insegnanti rese molto difficile la realizzazione di questa legge tanto che si parlò di fallimento, confermato dal fatto che nel 1876 erano state aperte soltanto 362 *rüşdiyye* e una sola *sultaniyye*. Ancora per molto tempo la situazione non sarebbe cambiata tanto che i tentativi di fondare una moderna università fallirono ripetutamente. Andò a buon fine, invece, la fondazione di una scuola femminile per l'insegnamento elementare [*Dar al-mu'allimat*] nel 1870 a cui seguirono altre 33 istituzioni simili in tutto l'impero<sup>17</sup>.

Si deve ai riformatori il merito di non aver abbandonato le province nel loro intento di sviluppo<sup>18</sup>. Grazie, infatti, alla legge *Wilayet* del 1871 si tentò

more scrutiny and thus, more pressure to live up to the new expectations of imperial citizenship. On the other hand, succeeding in earning the praise of imperial officials could also put new strains on Ottoman Jews' relations with other groups in the Empire». Si veda J. Phillips Cohen, *Becoming Ottomans. Sephardi Jews and Imperial Citizenship in the Modern Era*, Oxford, Oxford University Press, 2014, p. XIII.

<sup>16</sup> «The law called for an elementary school, or *Ibtidaiyye*, in each village, a middle school, or *ruşdiyye* school in each town, and an *idadiyye* or *sultani* preparatory school in each provincial capital. At the *ruşdiyye* level and above, the schools were divided into either military (*askariyye*) or civil *mülkiyye*». Si veda M. Province, *Late Ottoman State Education*, in J.S. Nielsen (ed.), *Religion, Ethnicity and Contested Nationhood in the Former Ottoman Space*, Leiden, Brill, 2012, p. 120.

<sup>17</sup> Si noti che un'analogia istituzione maschile fu fondata nel 1848: circa 22 anni prima.

<sup>18</sup> «An important motive for the promotion of education in the provinces was the aim to prevent the development of local nationalism or separatism». Si veda S.A. Somel, *The Modernization of*



una maggiore distribuzione delle offerte didattiche nei territori lontani e nel 1872 un decreto sulla promozione dell'alfabetizzazione primaria ebbe efficacia nelle zone più depresse e rurali in cui gli *'ulamā'* avevano ancora in mano la gestione stessa dell'istruzione. La coabitazione tra maschi e femmine era praticata ed accettata nelle scuole elementari ma mal vista e, in effetti, vietata nelle *rüşdiyye* tanto che furono fondate nuove scuole separate per le ragazze in cui oltre al curriculum tradizionale venivano impartiti corsi di sartoria e cucina. Soltanto nel 1873 viene fondata la prima scuola per la formazione commerciale femminile.

L'era delle *Tanzimat*, nonostante le difficoltà e le resistenze interne, si caratterizzò per uno sviluppo delle istituzioni scolastiche con una maggiore libertà per i non-musulmani e una apertura all'istruzione delle donne. In questo periodo aumentarono i contatti con l'Europa, i cui esperti sovente vennero chiamati a contribuire alla riforma del sistema educativo ottomano. La fondazione a Parigi della *Scuola Ottomana* (1857-1874) permise un proficuo scambio di studenti e di idee. Il potere clericale subì un profondo arresto con la formazione di una nuova classe dirigente laica e indipendente. La Costituzione del 1876 confermò l'obbligo dell'istruzione primaria gratuita riaffermando il ruolo dello stato centrale quale garante dell'istruzione generale. Sebbene il regno di 'Abd ül-Hamid II (1876-1909) verrà ricordato come un periodo di reazione e dispotismo<sup>19</sup>, il sultano si attivò personalmente per il miglioramento del sistema educativo anche se diede vita a un sistema di controllo capillare dei libri di testo con una durissima censura e, addirittura, spionaggio verso gli insegnanti. Si deve pur dire che il tasso di alfabetizzazione triplicò e molte altre scuole furono costruite. Tra il 1876-1899 crebbe notevolmente il numero delle scuole di istruzione secondaria e quelle per la formazione delle reclute e della polizia.

Questo periodo deve essere ricordato anche per una maggiore attenzione rivolta alle scuole economiche e professionali. Nel 1878, infatti, venne aperta la *Scuola di Finanza* e nel 1882 la *Scuola Commerciale*. Altre importanti istituzioni vennero fondate nel giro di pochi anni tra cui la *Scuola di Belle Arti* (1879), la *Scuola Veterinaria* (1889) e la *Scuola per la formazione dei sordomuti* (1889) che vanta una straordinaria tradizione di servizio alla collettività. Con il celebre decreto sull'educazione del 1883 si deliberò la presenza di una scuola per la formazione degli insegnanti in ogni provincia dell'impero e per andare incontro alle necessità economiche derivanti da tale impegno si impose una

*Public Education in Ottoman Empire 1839-1908*, Leiden, Brill, 2001, p. 72.

<sup>19</sup> In una recente pubblicazione di E.J. Zürcher sulla storia della Turchia moderna e contemporanea, il capitolo dedicato a 'Abd ül-Hamid II (1876-1909) ha il seguente titolo: *Reactionary Dispotism or Culmination of the Reforms?* Questa domanda è la prova della difficile interpretazione storica di un'epoca di tensioni che vedeva l'Impero Ottomano in bilico tra frizioni di modernizzazione all'interno e la pressione delle altre potenze europee all'esterno. Si legga E.J. Zürcher, *Turkey: a modern history*, London, I.B. Tauris, 2004, cap. VII.

*tassa d'assistenza* per la costruzione di scuole e per il progresso dell'istruzione pubblica.

Il nuovo sultano si rese perfettamente conto della crescente importanza geopolitica delle province per la sopravvivenza dell'Impero e sull'esempio dei riformatori precedenti volle che i benefici dell'istruzione pubblica arrivassero in tutti i territori. Si adoperò, infatti, per la formazione degli insegnanti nei territori arabi, curdi e albanesi. A tale proposito fu fondata a Beşiktaş nel 1894 la *'Ashiret Mektebi* [Scuola delle Popolazioni] in cui si preparavano i futuri insegnanti, ufficiali e amministratori dei territori non turcofoni. Finalmente l'università statale, dopo i precedenti tentativi falliti, aprì ad Istanbul nel 1900 a cui seguirono la *Scuola Medica di Damasco* nel 1903 (successivamente trasferita nel 1916 a Beirut e definitivamente chiusa nel 1918), le *Scuole di Giurisprudenza* di Konya, Salonicco e Baghdad fondate nel 1907.

L'importanza data dal sultano al settore strategico degli armamenti fece sì che vi fu un incremento delle spese militari con la fondazione di diverse scuole militari tra cui meritano menzione quelle di Damasco, Baghdad, Erzincan, Edirne e Monastir fondate nel 1904. In queste istituzioni si formarono circoli di studenti contrari al regime dispotico di 'Abd ül-Hamid II tanto che le primi avvisaglie della rivoluzione del 1908 erano già chiaramente visibili. Il malcontento della classe intellettuale militare e civile, oramai molto vicina alla mentalità europea, era cresciuto tanto da provocare il tracollo della struttura amministrativa e mettere in serio pericolo la stabilità stessa dell'Impero Ottomano.

L'epoca dei "Giovani Turchi", conosciuta anche con il nome di *secondo periodo costituzionale*, nacque, quindi, sulle ceneri della rivolta contro il dispotismo hamidiano e con la promessa di un rinnovamento totale della politica e dell'amministrazione centrale. In quegli anni la letteratura pedagogica europea entrò in circolazione con maggiore insistenza e grazie ad essa iniziò a formarsi la prima generazione di psico-pedagogisti locali tra cui spiccano i nomi di Sati' al-Husri (il quale si imporrà successivamente alla storia non solo come educatore ma anche come teorico del nazionalismo arabo), Rida Tewflik, Selim Sirri e Isma'il Hakki. Senza dubbio quest'era vide una metamorfosi del sistema educativo a causa di un processo trainante di modernizzazione occidentale e secolarizzazione aprendo le porte all'avvento dirompente di Mustafa Kemal.

Un'importante differenza fu l'abbandono del sistema francese come riferimento principale nei programmi e nella metodologia didattica a favore di quello anglosassone, considerato più snello e confacente alle esigenze e ai progressi dell'epoca. L'Università venne riorganizzata e nuove materie vennero proposte nei corsi di studio tra cui la sociologia e la filosofia che erano state messe al bando sotto il regno di 'Abd ül-Hamid II. Si formò la prima organizzazione di categoria degli insegnanti la quale rese molto aspro il confronto e la differenziazione tra i *khodja* (docenti d'ispirazione religiosa) e i *mu'allim* (docenti laici) in uno scontro tesissimo che era la chiara testimonianza di una transizione non solo politica ma anche culturale. Gli ideologi del *Comitato per*

*il Progresso e l'Unione*, la formazione politica maggiormente influente, chiesero insistentemente ed ottennero che venisse tolto agli 'ulamā' ogni interferenza nell'istruzione pubblica e si adoperarono per un rafforzamento dei poteri del Ministero dell'Educazione. La novità più rilevante venne affermata dalla *legge sull'istruzione elementare* del 1913 in cui furono istituiti dei distretti e sotto-distretti provinciali con responsabilità pedagogica, finanziaria e amministrativa.

Questa capillare decentralizzazione aveva l'obiettivo di provvedere ad una più efficiente gestione dei fondi e delle istituzioni scolastiche sia dal punto di vista didattico che da quello gestionale. Alcuni risultati innegabilmente vi furono – anche grazie alla maggiore attenzione data alla salute e all'educazione fisica – ma non sufficienti a coprire la domanda<sup>20</sup>. L'atavico problema delle zone rurali e montane non fu affatto risolto laddove, specialmente, era presente una forte resistenza d'ispirazione religiosa<sup>21</sup>. Le donne, comunque, in questi anni, acquisirono maggiore autonomia nelle loro scelte educative con una serie di nuove opportunità per l'istruzione secondaria. Nel 1911, infatti, fu fondata la prima *i'dadiyye* (scuola superiore di primo grado) femminile e nel 1913 il primo *Liceo Femminile* a Istanbul. Ad esso seguì la fondazione di scuole per la formazione di segretarie ed infermiere. Nel 1915 le donne furono finalmente ammesse all'università ma in classi separate, in cui seguivano corsi per diventare docenti di scuola superiore.

### *Il periodo repubblicano*

L'armistizio firmato il 31 ottobre 1918 a Moudros tra l'ammiraglio Calthorpe, comandante della *Divisione Britannica per il Mar Morto* e la Delegazione Ottomana rappresentata da Hüseyin Rauf Bey, ebbe il sapore amaro della

<sup>20</sup> «Ottoman authorities were quite aware of the militarization of physical education in Europe and its integration into school systems on the eve of the Great War. It is apparent that the Ottomans wanted to realize a similar change in their own school system. The school curricula during the Second Constitutional Era began to place a new emphasis on the body, and the discourse of healthy life became one of the major themes presented as an indispensable part of modernization in school text books». Si veda M. Besikci, *The Ottoman Mobilization of Manpower in the First World War: between Voluntarism and Resistance*, Brill, Leiden, 2012, p. 213.

<sup>21</sup> «A process of differentiation brought about the gradual separation of the sphere of religion from politics, and the leadership of the political elite began to look askance at the Islamic component of Ottoman culture. The Muslim lower classes did not follow the rulers in their secular stance, and the cleavage between the governing elite and the governed, which had always existed, became starker and now refocused on a religious axis. Paradoxically, this was a time when the elite was becoming increasingly dependent upon the masses: the program of modernization of Ottoman institutions could succeed only if it obtained the acquiescence and support of a plurality of the population». Si veda S. Mardin, *Religion and Social Change in Modern Turkey. The Case of B. Said Nursi*, Albany, State University of New York Press, 1989, p. 105.

capitolazione totale e del disfacimento dell'Impero<sup>22</sup>. Iniziò un periodo di lotte intestine per l'indipendenza dei territori ottomani e la Turchia non ne fu immune. Con il Trattato di Losanna firmato il 24 luglio 1923 apparve evidente che, sebbene la situazione fosse ancora tesa, il potere era fermamente nelle mani di Mustafa Kemal, il quale avrebbe imposto alla Turchia di lì a poco un drastico ed epocale cambiamento culturale, a cui avrebbe contribuito la ristrutturazione del sistema educativo. All'abolizione del califfato (3 marzo 1924) seguì la soppressione dei tribunali religiosi, delle scuole coraniche e lo scioglimento dell'ordine dei dervisci. La Legge n. 430 per l'unificazione dell'Istruzione (*Tawhid-Tedrisat*)<sup>23</sup> del 1924 fu il primo passo verso questo rinnovamento radicale e culturale dell'istruzione e del paese stesso. In essa veniva definitivamente chiusa la diatriba secolare tra educazione laica e religiosa con la creazione di un sistema d'istruzione completamente secolare e sotto il rigido controllo dello stato.

Con la fine della dicotomia tra rivendicazioni religiose – rappresentate dal Ministero per il Culto – e le istanze laiche delle formazioni politiche più emancipate ed europeizzanti, il Ministero dell'Istruzione Pubblica aumentò la sua sfera d'influenza e rivendicò un ruolo ben preciso nell'amministrazione kemalista dello stato. Come effetto della legge vennero chiuse 479 *madrassa* ma si provvide alla creazione della Facoltà di Teologia Islamica all'Università di Istanbul e di 26 scuole secondarie per la formazione degli Imam controllate direttamente dal Ministero. Il clima anti-clericale ed anti-religioso dell'epoca kemalista fece sì che molte di queste scuole vennero chiuse per mancanza di studenti. Nel 1928 l'Islam cessò di essere religione dello stato e il principio della laicità venne promulgato nella costituzione. Nello stesso anno i caratteri arabi della lingua turca vennero sostituiti con quelli latini: l'occidentalizzazione era compiuta. L'insegnamento dell'arabo e del persiano venne abolito dai programmi scolastici<sup>24</sup>. Non si deve ignorare che queste radicali riforme causarono vivaci proteste da parte della parte più tradizionalista della popolazione, che vedevano in esse una drastica rottura con il passato.

Sebbene dal 1932 non venne più proposta l'educazione religiosa nelle scuole secondarie, nei villaggi continuava una formazione parallela e, a volte, segreta tanto che quando si spensero negli anni quaranta i rigurgiti anti-clericali ci fu la proposta di reintroduzione dell'insegnamento della religione islamica. L'era di Mustafa Kemal Atatürk era terminata con le sue grandi opere di modernizzazione e le consuete contraddizioni di un paese estremamente diviso non solo geograficamente<sup>25</sup>. L'avvento del secondo conflitto mondiale vide la Turchia

<sup>22</sup> Zürcher, *Turkey: a modern history*, cit., p 133.

<sup>23</sup> Winter, *Ma' arif*, cit., p. 906.

<sup>24</sup> P.G. Donini, *Il mondo Islamico, Breve storia dal Cinquecento ad oggi*, Roma-Bari, Laterza, 2003, p. 293.

<sup>25</sup> «Throughout the Nineteenth and Twentieth centuries, nationalist ideologists typically conceptualized the relationship between the nation and the land, as well as the nation and the state, as a family relationship. Nationhood is often based on the idea of fraternity among male

all'inizio neutrale sino all'entrata in guerra nel 1945 al fianco degli Alleati. Al termine della guerra ci fu un difficile e burrascoso periodo di transizione dal partito unico kemalista alla democrazia. Il governo di Ismet Pasha Inonu si trovò di fronte al malcontento dei contadini impoveriti e dei burocrati legati ancora al vecchio regime. Le pressioni delle grandi potenze internazionali non resero affatto facile la gestione del potere e degli affari sia interni che esterni.

La legge sulla distribuzione delle terre del 1945 causò uno stallo nella politica nazionale divisa tra le pretese dei grandi latifondisti e i piccoli proprietari<sup>26</sup>. In questo clima si formò il Partito Democratico che ebbe il suo primo convegno nel 1947. Un governo di larghe intese guidato dal Partito Repubblicano Popolare (PRP) si instaurò per promuovere le riforme sociali ed economiche necessarie al rilancio del paese. In quegli anni, anche sulla base delle istanze democratiche della maggior parte della popolazione fedele al credo musulmano, si vide il ritorno dell'insegnamento della religione nelle scuole. Il Ministero dell'Istruzione Pubblica emise una circolare secondo la quale potevano usufruire di due ore di religione a settimana i bambini del quarto e quinto anno delle elementari a patto che i genitori fossero d'accordo e ne avessero fatto richiesta.

### *Innovazione e tradizione dopo la Seconda Guerra Mondiale*

Con le elezioni del 14 maggio 1950 andò al potere il Partito Democratico, il quale si differenziava per l'assenza di quella burocrazia militare e civile figlia del periodo kemalista o della burocrazia commerciale del PRP<sup>27</sup>. Riuscì in questo modo ad avere voce la parte della popolazione rurale che per lunghi anni aveva subito le riforme dall'alto senza partecipare attivamente alle decisioni politiche. Grazie agli ingenti aiuti del Piano Marshall, la Turchia assistette ad un grande sviluppo in special modo nel settore agricolo. Questo permise al Partito Democratico di consolidare il suo potere nelle elezioni politiche del 1954. Il legame con gli Stati Uniti venne rafforzato dall'ingresso della Turchia nella N.A.T.O. nel 1952. L'importanza geo-politica di questo evento non è di secondaria importanza per l'assetto internazionale.

citizens, established through imagining the homeland a woman. Such ideas legitimize the power of the nation-state over its population and turn the nation into a sphere in which men and women 'naturally' play out their gender roles. Turkish nationalism has not been an exception to this rule. The anthropologist C. Delaney argues that the foundation of Turkey was based on the metaphor of the rebirth of the nation through the union of the motherland (Anadolu) and the father leader (Atatürk)». Si veda E. Özyürek, *Nostalgia for the Modern. State, Secularism and Everyday Politics in Turkey*, Philadelphia, Duke University Press, 2000, pp. 66-67.

<sup>26</sup> Nel 1946 la Turchia diviene uno stato membro dell'Organizzazione delle Nazioni Unite.

<sup>27</sup> Zürcher, *Turkey: a Modern History*, cit., pp. 207 ss.

L'organizzazione del Ministero della Pubblica Istruzione, sulla base dell'eredità del periodo ottomano e kemalista, fu fermamente centralistico con la caratteristica determinazione di armonizzare un sistema educativo ancora troppo frammentato e disomogeneo nelle numerosi regioni dove convivevano i turchi con altre popolazioni di diverso ceppo linguistico e di diversa tradizione culturale. Il paese fu diviso in 12 *Direttori Regionali per l'Educazione*, ognuno dei quali era guidato da un sovrintendente per l'educazione [*ma'rif emini*], direttamente responsabile per il Ministero. Per andare incontro alle diverse esigenze locali, una maggiore flessibilità venne adottata nella gestione delle scuole. Ogni governatore di distretto, infatti, era responsabile delle proprie politiche scolastiche pur sempre rispettando le indicazioni nazionali comuni.

Questo non deve affatto ingannare: allo stato centrale era affidato il controllo dell'intero sistema educativo sia dal punto di vista pedagogico che da quello amministrativo e finanziario. Ad esso spettava ogni decisione veramente importante nelle politiche educative tanto che fu fondato – come istituzione sussidiaria di consultazione – un *Consiglio per l'educazione Nazionale* [*Milli Egitim Surasi*] che era formato da educatori, pedagogisti, psicologi, amministratori pubblici e altri esperti tecnici con il preciso compito di consulenza nella promozione delle politiche educative. Il Consiglio ebbe sin dall'inizio, ed ha ancora, una grande influenza nelle decisioni sui *curricula* didattici, i libri di testo e i regolamenti scolastici in genere. Ogni anno vi era un'assemblea generale. L'educazione religiosa tornò obbligatoria con la possibilità da parte dei genitori di escludere i propri figli da tale insegnamento con una richiesta agli organi competenti. Se in precedenza le ore di religione erano dirette agli alunni degli ultimi anni della scuola elementare, con l'anno scolastico 1956/1957 si estese alle scuole secondarie. Furono nuovamente istituite le scuole per la formazione degli *imam* e altre scuole religiose e fu fondata nel 1950 la Facoltà di Teologia Islamica [*Ilahiyat Fakültesi*] all'Università di Ankara.

Alla fine degli anni cinquanta la situazione economica cambiò radicalmente tanto che la contesa politica assunse i toni della crociata religiosa in cui i rappresentanti del Partito Democratico accusavano i repubblicani e i kemalisti di voler distruggere il sostrato tradizionale e rivendicavano, forti della base popolare, il diritto ad uno stato islamico. La situazione si fece tanto incandescente da aprire la strada al colpo di stato militare del 27 maggio 1960 che fu salutato da esplosioni di gioia da parte degli studenti e dell'*intelligentsia*<sup>28</sup> nelle grandi città e nelle regioni più sviluppate ma il resto del paese non mostrò affatto tale sentimento presentando ancora una volta la spaccatura del paese. I militari incaricarono alcuni professori della Facoltà di Giurisprudenza dell'Università di Ankara di scrivere la nuova costituzione. Con il ritorno alla democrazia parlamentare, si apriva l'epoca della *Seconda Repubblica*. Le ferite del passato non erano, comunque, sanate e si arrivò di nuovo ad uno stallo tanto grave che i generali intervennero con un

<sup>28</sup> *Ibid.*, p. 241.

*ultimatum* al governo Demirel<sup>29</sup>. Nel famoso comunicato del 12 marzo 1971 si chiedeva di formare un governo forte e capace di porre fine all'anarchia del paese e di realizzare le riforme necessarie «in uno spirito kemalista»<sup>30</sup>. Gli anni settanta furono anni di aspre contese politico-ideologiche in cui vennero alla luce molte formazioni dissidenti e terroristiche.

Nel campo educativo la legge n. 1472 del 1971 ribadì con forza il diritto ad una educazione gratuita in ogni ordine e grado delle scuole statali e nazionalizzò alcune scuole tecnico-professionali specializzate in economia e commercio, ingegneria e architettura. La forma di base del sistema educativo era così strutturata: scuola primaria [*ilkokul*] di cinque anni, una scuola media [*ortaokul*] della durata di tre anni e quindi la scuola secondaria o una scuola professionale di tre o quattro anni<sup>31</sup>. In quegli anni ci furono ottimi risultati con un grande passo in avanti nel tasso di alfabetizzazione (69% per gli uomini e 40% per le donne)<sup>32</sup>.

### *Recenti sviluppi e prospettive contemporanee*

La rinascita di formazioni islamiche alla fine degli anni settanta coincise con una grave crisi economica frutto di una concezione di sviluppo basata principalmente su una «politica di sostituzione delle importazioni, sulle rimesse degli emigranti e sugli aiuti occidentali»<sup>33</sup>. Questa visione della crescita non aveva fatto i conti con la recessione mondiale e l'aumento del prezzo del petrolio. La cosiddetta *Terza Repubblica*, nata dopo il colpo di stato e l'intervento dei militari del 12 settembre 1980, si trovò subito di fronte ai consueti problemi di democratizzazione del paese e a un nuovo interlocutore: le formazioni politiche

<sup>29</sup> «Moreover, there is an intradiscursive dependency: both education and defense are quintessentially 'national' activities and form the 'two fronts' of nation-state formation. In other words, these two activities are intricately linked, and together constitute major aspects of another discursive practice, namely nationalism. Particularly in early years of nation-building, the making of citizens and the make of soldiers can be seen as mutually dependent activities (*intradiscursive dependency*) while education and defense develop as mutually dependent discourses (*interdiscursive dependency*)». Si veda A. G. Altınay, *The Myth of the Military Nation. Militarism, Gender, and Education in Turkey*, New York, Palgrave-McMillan, 2004, p. 124.

<sup>30</sup> *Ibid.*, p. 258.

<sup>31</sup> «The dissolution of the independent household economy in the rural areas has accelerated the level of rural-urban migration, and education has become a 'compulsory' choice for the future of the children. The vocational High Schools, which are mostly operated as boarding schools incorporating secondary and high school education, have slowly, but decisively expanded toward the rural areas». Si veda R. Günlü, *Vocational Education and Labour Market Integration in Turkey: Requirements for Vocational Training and Development*, in A.M. Nohl, A. Akkoyunlu-Wigley, S. Wigley (edd.), *Education in Turkey*, Münster, Waxmann, 2008, p. 117.

<sup>32</sup> Winter, *Ma'arif*, cit., p. 906.

<sup>33</sup> Donini, *Il mondo Islamico, Breve storia dal Cinquecento ad oggi*, cit., p. 321.

di ispirazione religiosa ed integralista che avevano visto crescere il loro potere. Il merito di Kenan Evren fu di riportare un clima sereno nel paese dopo un periodo di caos e tensioni.

L'Islam politico spiazzò, infatti, «le opposizioni di destra e di sinistra raccogliendo consensi di massa»<sup>34</sup>. In questa atmosfera politica emerse il Partito della Salvezza Nazionale (comunemente conosciuto con il nome di *Rifab*), vincitore delle elezioni amministrative del 1994, il quale si presentò con l'aspirazione di armonizzare le istanze del pensiero politico islamico<sup>35</sup> con alcune soluzioni economiche che ebbero un largo consenso popolare: rifiuto della dipendenza economica e tecnologica dall'Occidente, progetti per l'imprenditorialità privata nazionale, sovvenzioni all'impresa turca e maggiori investimenti sociali. In questi anni, tuttavia, la politica governativa dell'economista Torgut Özal, già rappresentante alla Banca Mondiale, e del Partito della Madrepatria si impegnò per un risanamento della finanza statale e interventi per attrarre i capitali stranieri in un nuovo allineamento con l'economia europea. Nasce, infatti, nel 1996 l'unione doganale con la Comunità Europea che porterà grandi benefici.

Negli anni della *Terza Repubblica* le Conferenze sull'Educazione Nazionale assunsero un ruolo di guida e sviluppo delle politiche educative. Si assistette, infatti, ad una maggiore enfasi sulla riqualificazione delle scuole secondarie e sull'orientamento professionale (Conferenza sull'Educazione Nazionale 1981 e 1999)<sup>36</sup>. Si sviluppò una rete integrata di servizi per l'educazione pre-scolare e venne proposta una formazione manageriale del personale amministrativo della scuola per una gestione più efficiente dei fondi per l'istruzione. Già nel 1984 la Conferenza aveva tentato di facilitare l'accesso alla docenza proponendo incentivi salariali e una formazione universitaria adeguata e parzialmente gratuita.

<sup>34</sup> *Ibid.*

<sup>35</sup> «Islamic identity is politicized and stressed vis-à-vis other forms of national identities as a result of competition between different groups in society – such as intellectuals, Sufi orders, and political parties. These groups articulate and disseminate their political identities using modern forms of mass communication. Depending on the particular political and social context, Islamic groups and intellectuals may emphasize one layer of identity over others: religious, gender, status/class, ethnic, regional, tribal, territorial, or linguistic. These multiple layers of identity allow individuals to create and negotiate multiple and overlapping self-constructs and loyalties». Si veda M. Hakan Yuvuz, *Islamic Political Identity in Turkey*, Oxford, Oxford University Press, 2003, pp. 21-22.

<sup>36</sup> «The politicization of education has arisen in the contexts of frightened national self-consciousness in which crisis of republica identity are articulated as crisis of youth and moral-political orders. After all, which worldviews, social practices, and cultural norms will dominate the school system, arguably the most accessible and influential of all state institutions, has a considerable impact on the country's future. In the regard, newspapers have played a central role in whipping up controversy over education». Si veda S. Kaplan, *The Pedagogical State. Education and the Politics of National Culture in post-1980 Turkey*, Stanford, Stanford University Press, 2006, p. 57.



Alla fine degli anni Ottanta, nell'ambito di un ben più articolato programma di rinnovamento dell'assetto educativo – portato parzialmente a termine con le riforme successive agli eventi del cosiddetto *golpe post-moderno* (1997)<sup>37</sup> – venne proposto un massiccio investimento a favore della matematica, delle materie scientifiche e delle lingue straniere (fondamentali per il settore turistico).

Recentemente, per stare al passo con l'era tecnologica e con la società digitale, si è avviato un percorso didattico multifocale, in ogni stadio del sistema educativo, con adatte metodologie informatiche e multimediali per accrescere la competitività e l'efficienza. Sono evidenti nel processo di modernizzazione, sia a livello scolastico che universitario, la ricezione delle direttive delle Organizzazioni Internazionali e dell'Unione Europea con una particolare attenzione all'inclusione, alla diversità e alle disabilità<sup>38</sup>. I progetti europei per la formazione permanente del personale educativo (*Comenius, Grundtvig, et alia*) stanno avendo un discreto successo, aprendo le porte a nuove idee e modelli sperimentali<sup>39</sup> e snellendo la struttura amministrativa con pratiche innovative di management scolastico e pianificazione strategica<sup>40</sup>.

Al Partito della Giustizia e dello Sviluppo si deve l'attuale sistema educativo caratterizzato dal 4+4+4 votato dall'Assemblea Generale nel marzo del 2012<sup>41</sup>. La scuola primaria è divisa in due gradi obbligatori a cui si aggiunge un terzo livello di scuola superiore o, a scelta, di formazione professionale con la riapertura delle scuole religiose *Imam Hatip* espressamente dedicate alla preparazione degli

<sup>37</sup> Il *post-modern darbe* del 28 febbraio 1997 viene anche ricordato con il nome di 28 *Şubat süreci* o *Memorandum Militare del 1997*.

<sup>38</sup> «Because inclusion is so new to many schools, it is often necessary for school districts to revisit their mission or vision. Most organizations in the public and private sectors have gone through a process of planning, leading to the development and adoption of a mission and vision statements. In strategic planning the mission and vision statements are intended to provide the basis for organizational goal setting and action planning. Strategic plans, ideally, become the engine of the organization that members can identify with and relate to their particular pole». Si veda S.J. Faringa, D. Ness, *Encyclopedia of Education and Human Development*, London, M.E. Shape, 2005, p. 818.

<sup>39</sup> Cfr. OECD, *Education Policy Outlook: Turkey*, Paris, OECD Publishing, 2013.

<sup>40</sup> Cfr. World Bank, *Secondary Education Project (2012)*, <<http://www.worldbank.org/projects/P066149/secondary-education-project?lang=en>> (ultimo accesso: 12 Settembre, 2016).

<sup>41</sup> «The AKP considered education system, which has been based on the behaviorist education model, responsible for several problems, such as unskilled labor power and low success of students in international exams. The party criticized the curricula for not teaching students critical thinking skills, and pointed out the necessity for a structural reform in the education system that would replace the nationalist and behaviorist education model with the liberal and constructivist model». Si veda K. Inal, G. Akkaymak (edd.), *Neoliberal Transformation of Education in Turkey. Political and Ideological Analysis of Educational Reforms in the Age of AKP*, New York, Palgrave-McMillan, 2012, p. XIV.

imam e del clero musulmano<sup>42</sup>. Nell'ottica di un redivivo neo-ottomanesimo<sup>43</sup>, la diplomazia culturale ha assunto un ruolo centrale nella politica estera con l'apertura di una rete capillare di istituti di cultura turca *Yunus Emre*<sup>44</sup> e la stesura di protocolli d'intesa con università e centri di ricerca internazionali per la diffusione della lingua e cultura turca, a cui si unisce la già attivata offerta formativa per le comunità della diaspora sia dal punto di vista linguistico che religioso<sup>45</sup>. A queste iniziative – non senza alcune evidenti contraddizioni e contrapposizioni<sup>46</sup> – hanno preso parte non soltanto istituzioni statali ma anche, in una sorta di processo parallelo, organizzazioni, fondazioni e associazioni private<sup>47</sup>, a prevalente carattere religioso, tra le quali si segnalano quelle ispirate e fondate nel solco del movimento Hizmet<sup>48</sup> di Fetullah Gülen<sup>49</sup>.

<sup>42</sup> «Der Bedarf an Fachpersonal für den Betrieb der Moscheen wuchs mit der Besinnung auf die Religion. Die erste Imam-Hatip-Kurse des Jahres 1949 dauerten 10 Monate und hatten 50 Absolventen. 1951 wurde Imam-Hatip-Schule [Imam-Hatip-Okullari] gegründet, um zunächst insbesondere für die Berufe des einfachen Imams und Prediger auszubilden. Seitdem haben sich die Schülerzahlen von Imam-Hatip-Schule explosionsartig vermehrt». Si ved. U. Spuler-Stegemann, *Turkey*, in W. Ende, U. Steinbach, R. Laut (edd.), *Der Islam in der Gegenwart. Entwicklung und Ausbreitung. Kultur und Religion. Staat, Politik und Recht*, München, C.H. Beck, 2005, p. 238.

<sup>43</sup> «Academics also debate neo-Ottomanism as ranging from the '(re-)Islamization and "Middle Easternization" of Turkish foreign policy to Turkey's 'rediscovery' of its old neighbors». Si veda A. Sözen, *A Paradigm Shift in Turkish Foreign Policy: Transition and Challenges*, in B. Yesilda, B. Rubin (edd.), *Islamization of Turkey under the AKP Rule*, London, Routledge, 2013, p. 105.

<sup>44</sup> «The Yunus Emre Institute will conduct activities to establish Yunus Emre Turkish Cultural Centres in different countries throughout the world to promote Turkish language, culture, arts, and history. On one hand, the Yunus Emre Turkish Cultural Centres will be contributing to the promotion of Turkey through scientific projects, cultural activities, and courses, while on the other hand, the centres also aim to strengthen friendship ties and increase the cultural exchange with other countries». Si veda E. Fuat Keyman, S. Gumuscu, *Democracy, Identity and Foreign Policy in Turkey. Hegemony Through Transformation*, New York, Palgrave-McMillan, 2014, p. 176.

<sup>45</sup> Si veda specialmente il cap. 11 dal titolo *Migration, Turkey and Turks* in B. Park, *Modern Turkey: People, State and Foreign Policy in a Globalized World*, New York, Routledge, 2013.

<sup>46</sup> Cfr. R. Hermann, *Where is Turkey Headed. Culture Battles in Turkey*, Istanbul, Işık Yayıncılık Ticaret, 2015.

<sup>47</sup> «Small- and medium-size enterprises proliferated in Anatolia as a result of export-oriented economic policies in the 1980s and 1990s. This new business elite, called the Anatolian Tigers [Anadolu Kaplanlari], because it originated in Anatolian towns, wanted to stamp its provincial/ Islamic identity on and preserve its values and traditions, shaped by Sunni Islam». Si veda B. Eligür, *The Mobilization of Political Islam in Turkey*, Cambridge, Cambridge University Press, 2010, p. 201.

<sup>48</sup> «The group released a statement on April 7, 2013 expressing concern about new restrictions on the freedom of expression. This is a significant break since the Gülen was Erdogan's main ally against the Kemalist state establishment». Si veda A. Sengupta, *Myth and Rhetoric of the Turkish Model. Exploring developmental alternatives*, Dordrecht, Springer, 2014, p. 48.

<sup>49</sup> «The character, way of living, addresses and writings of Gülen's have drawn a wide following within and beyond Turkey. In particular Turkish Muslims, but also persons of range of religious beliefs and cultural origins, have been drawn to and influenced by his core commitment to the practice of dialogue, tolerance, and compassion. Through deeply rooted in Islamic belief and philosophy, Gülen's teachings have a breadth of scope and application that speaks to persons from a range of traditions, perspectives and life experiences». Si veda T.D. Conway, *Cross-cultural Dialogue on the Virtues. The Contribution of Fethullah Gülen*, Dordrecht, Springer, 2014, p. 3.

Tale «investimento culturale» ha un peso ancora più significativo nell'area di influenza caucasica e centro-asiatica – dove sono storicamente presenti popolazioni appartenenti allo stesso ceppo linguistico – in nome di un rinnovato pan-turanesimo<sup>50</sup>, architrave ideologico nell'ambito del processo di re-allineamento geopolitico<sup>51</sup> ed etnocentrico<sup>52</sup> di tutta quella vasta area dai Balcani al Mar Caspio, dal Lago di Aral ai Monti dell'Altaj<sup>53</sup>.

<sup>50</sup> Si legga J.M. Landau, *Pan-Turkism. From Irredentism to Cooperation*, London, C. Hurst & Co. Publishers, 1995.

<sup>51</sup> Cfr D. Keridis, *The Foreign Policy of Turkey*, in B.J.C. McKercher (ed.), *Routledge Handbook of Diplomacy and Statecraft*, New York, Routledge, 2012, pp. 155-166.

<sup>52</sup> «A central issue for many social scientists, politicians, educators, and others is what is known as the 'modern ethnic problem'. [...] Ethnicity is linked, indeed, to many focal issues of our times, such as globalization, increasing migration, multi-culturalism, economic development, social relationships, contemporary nationalism (in support or in opposition), inter-communal or inter-state conflicts, terrorist activities and the creation and promotion of diasporas. [...] Ethnopolitics or the political demands and activities of discontented ethnic groups seeking more power and cultural rights, as well as better access to education, jobs, and resources, have been increasingly the general situation in numerous states, pitting nationalism against one another». Si veda J.M. Landau, B. Kellner-Heinkele, *Politics of Language in the Ex-Soviet Muslim States: Azerbaijan, Uzbekistan, Kazakhstan, Kyrgyzstan, Turkmenistan, Tajikistan*, London C. Hurst & Co. Publishers, 2001, p. 1.

<sup>53</sup> «Languages attitudes have an important role in determining both personal and group linguistic identity. Languages reform, particularly in post-Soviet states, frequently reflect the desire of some of their elites for a new national identity, which has meant re-identifying their values. Their responses are driven by differing proportions of principles and pragmatism. Language has always been – and still is – central to notion of identity as a crucial element in the collective cultural perceptions of many communities». Si veda J.M. Landau, B. Kellner-Heinkele, *Language Politics in Contemporary Central Asia: National and Ethnic Identity and the Soviet Legacy*, London, I.B. Tauris, 2011, p. 4.



# Banned, Bagged, Bowdlerized: A Diachronic Analysis of Censorship Practices in Children's Literature of Turkey

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**ABSTRACT:** The primary aim of this study is to explore the historical dynamics of censorship practices as an organized state policy which sustains and promotes the control and suppression of both home-grown and translated children's books in Turkey from a diachronic perspective. Analysis of Turkish politics regarding censorship policies for children in curricula and literature reveals a continuum from state-centered public censorship policies of early republican period to Islamist structural censorship policies in more recent times. In other words, historical records reveal that the promulgation of ideologies in children's literature is operated along the axes of Republican mentalities and pro-Islamist conservative ideology. Within this political climate, different modes of censorship practices highlight the critical role of children's books as a didactic political instruments, which are banned, covered in plastic bags, hidden, and stigmatized on the grounds that they constituted harm to minors.

**EET/TEE KEYWORDS:** Censorship practices in children's literature; Public censorship; Structural censorship; Republican ideology; Turkey; Republican history; XX-XXI<sup>th</sup> Centuries.

## *Introduction*

Ideology in children's literature with respect to (re)production, maintenance and regulation of power relations in a society to inculcate stereotyped assumptions, to fabricate common consent, to legitimate power abuse, to instill or shield from a doctrine is heavily influenced by the changes in the political

climate of a country<sup>1</sup>. Whether the intentions of indoctrination are deliberate or not, book production involves an infiltration/normalization process through which societal normalities are introduced to young readers to ensure that certain norm(s) of behavior and ideologies will be carried over to posterity. For Thompson «production and diffusion of the dominant ideology is one of the tasks of the state, or of particular agencies and officials of the state»<sup>2</sup>. Censorship, as «a form of manipulative rewriting of discourses»<sup>3</sup>, is one of the mechanisms referring to a blatant ideological repression which controls and manipulates the flow of information and ideas. Under the surveillance of state politics, censorship can be employed to mold a desirable world view and discourse production<sup>4</sup>. In other words, as a re-engineering or maintenance process of a regime, censorship practices can function as a supporting structure to sustain a certain ideology and as an ideological filter which remove ideas that are considered undesirable for children. In contrast to popular wisdom on censorship practices in adult literature, censorship in children's literature, which involves extreme imposition of ideology on aesthetics, moral, political and religious grounds, is not correlated with repressive contexts, but positively connoted when it is considered for children. Hence, censorship as a purifier which removes the risk of contaminating children becomes a natural collaborative task for planning and guiding. Censorship practices can be defined and classified in various different ways. An institutionalized public censorship is carried out by public authorities through enforcing explicit laws, and building a censorial macrostructure to shield the whole nation from dissident voices. Structural censorship, as a concept coined by Bourdieu<sup>5</sup>, constitutes censorship in the form of a naturalized control of a desirable discourse imposed by a set of unwritten rules rather than explicit laws. This definition underlines that censorship is a process, realized through the relationships between agents having dominant

<sup>1</sup> See: M. Knowles, K. Malmkjaer, *Language and Control in Children's Literature*, London & New York, Routledge, 1996; J. Stephens, *Language and ideology in children's fiction*, London & New York, Longman, 1992; P. Hollindale, *Ideology and the Children's Book*, in P. Hunt (ed.), *Literature for Children: Contemporary Criticism*, London & New York, Routledge, 1992, pp. 19-40; G. Thomson-Wohlgemuth, *Flying High – Translation of Children's Literature in East Germany*, in J. van Coillie, W.P. Verschueren (edd.), *Children's Literature in Translation: Challenges and Strategies*, Manchester, St Jerome, 2006, pp. 47-60; Id., *On the Other Side of the Wall: Book Production, Censorship and Translation in East Germany*, in F. Billiani (ed.), *Modes of Censorship and Translation. National Contexts and Diverse Media*, Manchester, St. Jerome, 2007, pp. 93-116; Id. *Translation under State Control: Books for Young People in the German Democratic Republic*, London and New York, Routledge, 2009.

<sup>2</sup> J.B. Thompson, *Ideology and Modern Culture*, Oxford, Polity Press, 1990, p. 86.

<sup>3</sup> Billiani (ed.), *Modes of Censorship and Translation. National Contexts and Diverse Media*, cit., p. 3.

<sup>4</sup> Thomson-Wohlgemuth, *Flying High – Translation of Children's Literature in East Germany*, cit.; Thomson-Wohlgemuth, *On the Other Side of the Wall: Book Production, Censorship and Translation in East Germany*, cit.

<sup>5</sup> P. Bourdieu, *Language and Symbolic Power*, Cambridge, Polity Press, 1991.

positions with a dominant visible and audible discourse shaped by current habitus. In a similar vein, Bourdieu<sup>6</sup> states that

it is the structure of the field itself which governs expression by governing both access to expression and the form of expression, and not some legal proceeding which has been specifically adapted to designate and repress the transgression of a kind of linguistic code.

Drawing on these critical assumptions, this article explores two operative modes of censorship, namely public censorship and structural censorship, as well-planned state policies which attempt to conceal, distort, or falsify information, while promoting the control and suppression of both home-grown and translated children's books in Turkey from a diachronic perspective. To broaden the perspective on the Turkish censorship story, it would be appropriate to provide readers with some background information on the country's political development over the 90 years, in which a state-centered political regime has emerged, through early republican policies, three subsequent military coups, and finally, pro-Islamist AKP regime, in power since the general elections of 2002. Thus, concerning the last 80 years, this study draws extensively upon archival sources, interviews, newspapers and research books on censorship practices in children's literature. The analysis on the decade of AKP government is based on examples of textual manipulations.

## 1. *Socio-political Context and Censorship in the Republican History*

### 1.1. *Public Censorship in Early Republican Era*

The modern Turkish Republic, which emerged out of the ashes of Ottoman Empire, was not simply an administrative replacement for the failed Empire, but also an explicit new national identity which sought to define a new vision of «democratic state» through a process of western-style modernization. Following the establishment of the Republic in 1923, combined with the need to create a «new citizen» during the nation-building process, the official ideology has adopted of enlightenment and progressivism in establishing the new society and corresponding mentality. With this purpose, Mustafa Kemal Atatürk, founder of modern Turkish republic, secularized the state politics in order to subordinate religion to the state, and immediately launched his cultural revolution, through which he abolished the caliphate; banned all religious schools, orders and institutions; brought in Swiss civil law, German trade and commercial law instead of Islamic Sharia law; replaced the Arabic with

<sup>6</sup> *Ibid.*, p. 138.

Latin script, thus detaching Islamist groups from their Islamic past; introduced compulsory co-educational classes, and banned the display of religious symbols in public institutions.

Within this political climate, the Law of Establishment of Public Order, which entered into force in 1925, enabled the government to build a massive authority system to restrict the freedom not only of the press, but also radio and television broadcasting, films, plays and books<sup>7</sup>. The Latinizing of the Turkish alphabet was a remarkable example of Atatürk's modernist program, which also swept away the idea that state's legitimacy rested on its attachment to Ottoman script and Islam<sup>8</sup>. In November 1928, the Grand National Assembly adopted a law forbidding the use of Ottoman script in the press after December, 1 1928, in state documents after January 1, 1929, in civil documents after June 1, 1929<sup>9</sup>. This reform inevitably increased the demand for reading material in latinized Turkish, and paved the way for an implicit censorship which imposed «prescribed legitimate language practices since they are sets of sanctioned statements which can exert a considerable influence on the way people act and think»<sup>10</sup>. In order to protect the young from periodicals and other publications considered to be potentially injurious to the morals of under 18 year olds, a law on the Protection of Children from Obscene Publications was put into force in 1927 based on the founding philosophy of the young Turkish Republic, which was to an attempt at societal engineering. The law targeted at publications which could potentially damage the integrity and morals of minors.

It is possible to see the concerns of a translator mangled by alphabet reform, which, required publications in modern Turkish, and strict legislation on obscenity. Under the strict regime of the early republican period and socio-cultural norms in the late 1930s of Turkey, in his 12-page preface to the first translation of Oscar Wilde's *Bahtiyar Prens* (*Happy Prince*)<sup>11</sup> into modern Turkish, Nurettin Sevin had the opportunity to exculpate Oscar Wilde's universal artistic value. He was motivated by two factors. On the one hand, he was providing justification on the translation of this book for the Turkish nation «who made a substantial progress in reading rates in the last decade»<sup>12</sup>.

<sup>7</sup> A. Kabacalı, *Türkiye'de Basın Sansürü* [Censorship in the Press in Turkey], in M. Belge, B. Özüakın (edd.), *Cumhuriyet Dönemi Türkiye Ansiklopedisi*, İstanbul, İletişim, 1995, Vol. IV, pp. 959-966 (in Turkish).

<sup>8</sup> Ş. Mardin, *Religion and Secularism in Turkey*, in A. Kazancıgil, E. Özbudun (edd.), *Atatürk: Founder of A Modern State*, London, C Hurst & Co Publishers, 1981, pp. 191-212.

<sup>9</sup> N. Tongul, *Türk Harf İnkılabı* [Turkish script reform], «Atatürk Yolu», vol. 9, nn. 33-34, pp. 103-130, 2004 (in Turkish).

<sup>10</sup> H. Erkazancı, *Language Planning in Turkey: a Source of Censorship on Translations*, in T. Seruya, M.L. Moniz (edd.) *Translation and Censorship in Different Times and Landscapes*, Newcastle, Cambridge Scholars Publishing, 2008, pp. 241-251.

<sup>11</sup> O. Wilde, *Happy Prince*, London, Nutt, 1888; Turkish transl. Bahtiyar Prens, İstanbul, Hilmi Kitapevi, 1938.

<sup>12</sup> *Ibid.*



On the other hand, he was expressing his strong disagreement with the baseless claims that Wilde had immoral and obscene works, and put forward his own sound reasons for attempting to translate this book.

In general, the book prohibitions and confiscations during 1930s were primarily justified on the grounds of extending publications of communist propaganda, publications which opposed the republican reforms, publications against the Laws on the Maintenance of Order, provocative publications made by Greek and Armenian citizens, and obscene publications. During this period, *L'Intrépide*, a French magazine for children, was banned on the grounds of inappropriateness for children due to its portrayal of immorality and obscenity<sup>13</sup>.

### 1.2. *İnönü Period*

After Atatürk's death, the early 1940s witnessed strict measures introduced by the two-decade old one-party government in an oppressive atmosphere against the background of Second World War. During the turbulent transition from the one-party to the multi-party system, extraordinary restrictions, martial law, and despotism were all observed in the political arena, which gave rise to closure of newspapers disapproved by the government. In this period, the rationale for censorship was based on prevention of religious and communist propaganda, publications against Turkey's external policy and allied nations, publications included anti-Turkish propaganda and disturbed the public peace as well as separatist publications promoting Kurdism, Armenianism etc.<sup>14</sup> In the censorship of children's books, journals and brochures, emphasis was on overseas publications on the curricula and books found in the libraries of schools run by other nationalities. *Free Bulgaria*, a magazine published in Bulgaria and sent to the English High School for Girls in İstanbul, was banned for making communist regime propaganda. By the same token, another magazine, published in Sophia and used as a part of curriculum in Turkish schools in Bulgaria, was *Vatan Cephesi için Birlikte İleri Eylülcü Çocuk* [Septemberists, Onward for National Front]. This was prohibited, again on the account of making communist propaganda. Moreover, distribution of *Çocuklarımıza Din Okuma Kitabı* [Religious Books for Our Children, 4 books, 1944-49] by Eşref Edip, was banned, copies were confiscated due to religious propagation<sup>15</sup>.

<sup>13</sup> M. Yılmaz, Y. Doğaner, *Cumhuriyet Döneminde Sansür: 1923-1973* [Censorship in Republican Period: 1923-1973], İstanbul, Siyasal Kitabevi, 2007 (in Turkish).

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

<sup>15</sup> *Ibid.*

### 1.3. *The Menderes Period*

In the 1950 election, the Democratic Party (hereafter DP) under the leadership Adnan Menderes came to power. Towards the end of the decade in which the party was in power, it fell into disfavor due to suppressive policies, strong restrictions and pressure on press, the direct interference of universities in politics, amendments in Press Law through which sentences and fines were increased, and the establishment of a so-called investigation commission [Tahkikat Komisyonu], which provided power to government to confiscate publications, close newspapers and publishing houses<sup>16</sup>. Eventually, in May 1960, a military takeover was triggered by instrumentalization of religious sentiments and reislamization of the society through incorporating Islam back into public life by legalizing use of Arabic and creating a boom in the construction of mosques, theological colleges and high schools for training preachers (İmam-Hatip schools).

During their single-party regimes (1924-46), Atatürk and İsmet İnönü tried to render any pre-republican Islamic references to the attributes of a modern nation-state in such a way as to fashion a social memory completely divorced from the former Ottoman state; however, this transition was interrupted by the Menderes regime<sup>17</sup>. The main reasons of censorship within this period were the threat of communist and minority group propaganda, preventing the insults to Turkey, and criticism of allied nations<sup>18</sup>. During Menderes period, communist propaganda was the reason given for banning grammar and biology course books used in Turkish minority schools in Bulgaria and one of the two declarations of European Committee of Advanced Young Turkish Union [İleri Jön Türkler Birliği], entitled *İrticaa Karşı Atatürkçü Milli Kurtuluş İnkılabı Prensiplerini Koruma Savaşında Türk Gençlerine ve Öğrencilerine Düşen Ödevler* [The Task of Turkish Youth and Students in the Battle of the Protection of Kemalist National Independence Reform against Reactionary Movements]. In a similar vein, *Mavi Yunanistan'a Dönüş* [Returning to Blue Greece] a children's book in Greek published in Athens, was banned on the grounds of creating anti-Turkish thoughts and sentiment. *Çocuğun Ansiklopedisi* [The Encyclopedia of the Child], a book published in Athens was also banned from entering into Turkey as it was considered to generate hostility towards Turkey and Turkish people. A brochure, *Melekutun Bu İyi Haberi* [Good News from Divinity],

<sup>16</sup> H.N. Şahhüseyinoğlu, *Dünden Bugüne Düşünceye ve Basına Sansür* [Thought and Press Censorship: Past and Present], İstanbul, Paragraf Yayınları, 2005 (in Turkish).

<sup>17</sup> S. Kaplan, *Din-u Devlet All Over Again? The Politics of Military secularism and Religious Militarism in Turkey Following the 1980 Coup*, «International Journal of Middle East Studies», vol. 34, 2002, pp. 113-127.

<sup>18</sup> Yılmaz, Doğaner, *Cumhuriyet Döneminde Sansür: 1923-1973*, cit.

which was published in USA and sent to Turkey for Christian mission purposes, was prohibited on the grounds that it was missionary propaganda<sup>19</sup>.

#### 1.4. 1961 First Military Intervention

The Turkish army, proclaiming itself the guardian of Kemalist laicism, and accusing the DP politicians of undermining the secular legacy of Atatürk, toppled civil government of Prime Minister Menderes and executed him alongside two of his ministers in 1961. Although 1961 constitution was established after the coup in reaction to the DP era, it is still considered to be the most democratic constitution in Turkish history, as it advocated pluralistic democracy<sup>20</sup>. Within the framework of new constitution, articles assuring freedom of the press and prohibiting censorship were also included, thus launching a real process of democratization<sup>21</sup>. In contrast to these freedoms, however, this constitution enshrined an unelected military bureaucracy perpetuating its own interests by imposing restrictions on press, journalists, and those who criticized this coup by means of the National Security Council (MGK), and the newly established Constitutional Court<sup>22</sup>. The primary aims of censorship during this period were to suppress the spread of communism, Armenianism and Hellenism, and to prevent publications making anti-Turkish propaganda and disturbing the public peace. In this period, *Çağdaş Yunan Tarihi* [Contemporary Greek History], a book used in fifth grade curriculum of primary schools in Athens was banned for derogating and insulting Turkish nation<sup>23</sup>.

#### 1.5. 1971 Military Intervention

In the wake of the second military intervention, in March 1971, Turkey in 1970s witnessed the first Islamist parties from which emerged a highly populist Islamic discourse evoking Ottoman heritage, citing Kemalist westernization

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

<sup>20</sup> B. Oran (ed.), *Türk Dış Politikası: Kurtuluş Savaşından Bugüne Olgular, Belgeler, Yorumlar*, Cilt 1: 1919-1980 [Turkish Foreign Policy: Facts, Documents, and Comments from War of Independence till Today, Vol.1: 1919-1980], İstanbul, İletişim Yayınları, 2006; Y. Hazama, *Constitutional Review and the Parliamentary Opposition in Turkey*, «The Developing Economies», Vol. 34, n. 3, 1996, pp. 316-338.

<sup>21</sup> See *Cumhuriyetin 75 Yılı* [The 75<sup>th</sup> Anniversary of the Republic], Vol. II and III, İstanbul, YKY, 1999, pp. 480-481.

<sup>22</sup> A. An-Na'im, *Islam and the Secular State*, Cambridge-London, England, Harvard University Press, 2008.

<sup>23</sup> Yılmaz, Doğaner, *Cumhuriyet Döneminde Sansür: 1923-1973*, cit.

process as the reason for Turkey's economic and moral decline, and positing a new alternative paradigm for laicist Kemalism. Due to the brutal suppression of the Left by the military junta, thousands of people were prosecuted in an effort to block social opposition and non-governmental organizations. In accordance with the Martial Law, many books were banned; dozens of publishing houses were suppressed, as their publications were considered to be an incitement to crime. Books written by prominent leftist writers were removed from the school curricula and libraries by the Ministry of Education. In a circular letter sent by the Ministry of Education to all schools, certain books were named as sources of disruption of national civility, morals, social and familial values. Although they were not officially banned, these books which were not considered to accord with Turkish National Education Policy, were not allowed in school and class libraries, and those already present in schools were confiscated<sup>24</sup>. These blacklisted books consisted of mainly the works of leftist writers such as Çetin Altan, Refik Erduran, Fakir Baykurt (five books), Orhan Kemal (7 books), Rıfat Ilgaz, Yaşar Kemal, Muzaffer İzgü, Bekir Yıldız, Sabahattin Ali, Aziz Nesin, among others, and of world-wide prominent authors, namely, Jean Paul Sartre, Albert Camus, Charles Dickens, Cengiz Aytmatov, Nikolai Gogol, Fyodor Dostoyevski, Wilkie Collins, among others<sup>25</sup>. In 1978, rather than sending a circular letter to all schools, the Ministry of National Education send a list of books having a proscriptive content for Turkish Youth and children.

### 1.6. 1980 Military Intervention

The September 12, 1980 coup, which ended civilian rule, introduced severe restrictions on freedom of expression. This third intervention devastated the Left, prosecuting and jailing tens of thousands of its supporters. During the 1980-83 military regime, the Islamization process was institutionalized through Turkish-Islamic synthesis [Turk-Islam Sentezi] which launched mandatory religious primary education and a strong emphasis on Sunni Islam in 1982 constitution<sup>26</sup>. The post-coup period in which all other established party leaders were forbidden to engage in political activity, allowed the emergence of Turgut Özal, then Prime Minister (1983-1989), a pious agent of the rightist perspective, who renounced the conventional rightist paradigms, assumptions

<sup>24</sup> E. Karaca, *Vaaay Kitabın Başına Gelenler!* [Wow What happened to the books!], İstanbul, Belge Yayınları, 2012 (in Turkish).

<sup>25</sup> S. Şentürk, *Türkiyede Kitabın Yargı Serüveni* [The Trial of the Book in Turkey], <<http://www.milliyet.com.tr/turkiye-de-kitabin-yargi-seruveni-kitap-1110840/>> (last accessed: March 22<sup>th</sup>, 2015) (in Turkish).

<sup>26</sup> I. N. Grigoriadis, *Islam and Democratization in Turkey: Secularism and Trust in a Divided Society*, «Democratization», vol. 16, n. 6, 2009, pp. 1194-1213.

and attitudes<sup>27</sup>. In this respect, The 1980s was not only a decade of radical transformation but also of a reorganization for Turkish cultural, intellectual and ideological life.

The scope of Law of Establishment of Public Order, renamed as «the Law to Protect Minors from Harmful Publications» was widened by the post-military coup regime in 1986, and was extensively used against the press, publishing houses, authors, magazines, musicians and film makers. In order to make an initial assessment, and make a decision as to whether a publication was unsuitable for minors, a Board to Protect Minors from Harmful Publications was also founded. This law also required offending publications either to be banned outright or to be sold in opaque plastic bags carrying only the title of the book and the words «harmful to minors» could be written. These covered books could not be displayed or taken into schools, and consequently they disappeared from the bookshelves. Although the ostensible reason for this application was to stop the sale of the harmful books to the minors, politically sensitive books written for adults were also banned, covered in plastic bags, hidden, and stigmatized on the grounds that they constituted harm to minors.

According to an editorial in the prominent leftist newspaper Cumhuriyet dated December 27, 1987, the enactment of this law and functioning of this board indicated the commencement of a new era in Turkey, which suggested that «the concept of obscenity in the Turkish Penal Code is being changed to comply with the National Education Ministry's law on basic education; that publications intended for adults are now assessed on the basis of standards that apply to minors»<sup>28</sup>. «In some cases, children's books have been found harmful by the Board. Aygören Dirim, a publisher of books for pre-school and school-age children, told us that this has led to the absurd practice of a restricted or X rated stamp on books-restricting children from reading books that are designed only for children»<sup>29</sup>.

Erdal Öz, a novelist and editor-in chief of Can Publishing House, acknowledged that the books published by his printing house had become one of the targets of the police, prosecutors, and the Board as a part of efforts to protect minors after the Law to Protect Minors entered into force in March 1987. Some twenty of the children's books on his list were either banned outright or sold in plain wrapping and labelled as being restricted to adults only<sup>30</sup>. Among the forbidden children's books was *Gülibik* [Rosycockscomb] by Çetin Öner, a story about a

<sup>27</sup> F. Acar, *Turgut Özal: Pious Agent of Liberal Transformation*, in M. Heper, S. Sayarı (edd.), *Political Leaders and Democracy in Turkey*, Lanham, Lexington Books, 2002, pp. 163-180.

<sup>28</sup> *Helsinki Watch, Paying the Price: Freedom of Expression in Turkey*, USA, U.S. Helsinki Watch Committee, 1989, p. 17.

<sup>29</sup> *Ibid.*, p. 76.

<sup>30</sup> N. Neydim, *Erdal Öz ile çocuk edebiyatını kullanmak üzerine* [An Interview with Erdal Öz on Children's Literature], <<http://umitzeynep.blogcu.com/erdal-oz-ile-cocuk-edebiyatini-kullanmak-uzerine/620673>> (last accessed: February 19<sup>th</sup>, 2015) (in Turkish).

poor boy and his friendship with a rooster, which was condemned as making communist propaganda, and banned from school libraries. Erdal Öz himself was investigated as a communist sympathizer for having published the book. *Gülibik* was filmed as the first Turco-German production (ZDF and TRT) in 1983, and was awarded by C.I.F.E.J. prize in Berlin International Film Festival. The film also won the prize for the best film for children in USA, Yugoslavia and in Spain<sup>31</sup>. Many books were subjected to prosecution and confiscation at various times, including *Donumdaki Para* [The Money in my Underpants], by Muzaffer İzgü, *Kan Kardeşim Dorutay* [Dorutay, My Blood Brother] by Ümit Kaftancıoğlu, all Aziz Nesin works including those for children, and some translated books considered to be the source of imported detrimental thoughts, such as the infamous *Küçük Kara Balık* [The Little Black Fish] by Samad Behrangi, *Şişkolarla Sıskalar* [Patapoufs et Filifers] by Andre Maurois, and *Küçük Prens* [Little Prince] by Antoine de Saint-Exupery.

Ragıp Zarakolu, the owner of the Belge Publishing Company, underlined that in the 1980, children were under legal protection from not only obscene contents, but also from the issues of social class, which were both considered to constitute harm. Zarakolu added that «The Gözlem Publishing Company published children's literature and books on alternative, liberal education. The company was closed because of allegedly class-related contents. After that, no other publishing company published these sorts of children books»<sup>32</sup>.

In a similar vein, copies of *Çağdaş Çocuk Ansiklopedisi* [Contemporary Children's Encyclopedia], written by Hasan and Leyla Kıyafet, were confiscated and burnt on the grounds that it attempted to differentiate between the lifestyle and mindsets of the rich and the poor, and thus stimulated class difference. Another book, *Bizim Lise* [Our High School] by Hasan Kıyafet was investigated for allegedly being an ideologically-biased book<sup>33</sup>.

Apart from preventing the circulation of certain books in society, enforcement of the law to Protect Minors from Harmful Publications put restrictions on which books were allowed in schools and on the school curricula. In 1985 Vehbi Dinçerler, Minister of National Education, sent a circular letter to all schools claiming that Darwin's theory of gradual evolution had been long rejected and that to teach evolution theory at schools was to serve materialist and communist doctrine. Then, on his order, high school biology curriculum was redesigned by a committee consisting of meticulously selected scholars<sup>34</sup>.

<sup>31</sup> Ç. Öner, *Bana Gelen Mektuplar: Erdal Öz* [The Letters I received: Erdal Öz], «İmge Öyküler», vol. 3, 2005, pp. 96-99 (in Turkish).

<sup>32</sup> N. Vardar, *The Harm of Harmful Publications*, <<http://bianet.org/bianet/freedom-of-expression/130859-the-harm-of-harmful-publications>> (last accessed: February 10<sup>th</sup>, 2015).

<sup>33</sup> C. Fırınacı, *Hasan Kıyafet ile Yasaklı Kitaplar Üzerine* [An Interview with Hasan Kıyafet on his banned books], <<https://cansufirinci.wordpress.com/2010/01/10/hasan-kiyafet-ile-yasakli-kitaplar-uzerine-roportaj-cansu-firinaci/>>, (last accessed: February 14<sup>th</sup>, 2015) (in Turkish).

<sup>34</sup> F. Demir, M. Metinoğlu, *Bir gericilik alanı: Yaratılışçılık* [Creationism: A Field of

«In 1986, Dinçerler had all textbooks completely revised to conform with the tenets of the Turkish–Islamic Synthesis, which enabled post-1980 coup regime to plant the universal Islamic community in the geopolitical borders of the Turkish nation-state. The new texts extol the alliance between the military and religious as native to the Turks' cultural essence»<sup>35</sup>. In November 1987, the National Education Ministry ordered all public schools to exclude Moliere's *Le Bourgeois Gentilhomme*, Voltaire's *Candide*, and Camus's *La Peste* from school libraries on the grounds that they contain anti-Turkish and anti-Islamic statements<sup>36</sup>. In 1988 the following authors were named as being inappropriate in Turkish schools «since they harmed human thinking and undermined Turkey's national integrity: Voltaire, Malthus, Darwin, Freud, Marx and Bergson»<sup>37</sup>.

Reinstating the pre-republican ideals of religious content in the curriculum, state educators gradually removed commitment to the Atatürk's heritage from the school curricula. Ironically, in 1998, the Ministry of National Education banned the distribution of book series focusing on the principles of Mustafa Kemal Atatürk, the Independence War and the recent history of Turkey published by *Cumhuriyet*, a leading leftist newspaper in the country<sup>38</sup>.

Changes in the country's dynamics following the 1980 military intervention crystallized the divide between the leftist, pro-Western secularist front and the nationalist, pro-Islamic front, and this situation led to the rapid increase in the number of publishing houses in order to meet the demands of increasing size and range of readership. The sharp growth in the number of readers of Islamist literature between 1980 and 1990 engendered a booming Islamic publishing industry cherished by a new generation of Islamist intellectuals.

### 1.7. *The Ruling AKP: A Path to Structural Censorship*

At the beginning of 2000s, a new formation, Justice and Development Party (henceforth AKP), promoted itself as a modern conservative party loyal to secularism rather than embracing his inherited Islamist National View ideology.

Secularists, however, have accused AKP government of having a secret agenda, the Islamization of Turkish state and society and of seeking a silent

Conservatism] <<http://www.sendika.org/2013/02/bir-gericilik-alani-yaratiliscilik-fatma-demir-mehtap-metinoglu/>>, (last accessed: February 14<sup>th</sup>, 2015) (in Turkish).

<sup>35</sup> Kaplan, *Din-u Devlet All Over Again? The Politics of Military secularism and Religious Militarism in Turkey Following the 1980 Coup*, cit., p. 120.

<sup>36</sup> Info-Turk, (1987), *Two Thirds of Deputies for a Third of the Votes: Final act of the electoral farce*, <<http://www.info-turk.be/133.E.htm>> (last accessed: March 28<sup>th</sup>, 2015).

<sup>37</sup> *Helsinki Watch*, *Paying the Price: Freedom of Expression in Turkey*, cit., p. 77.

<sup>38</sup> Karaca, *Vaay Kitabın Başına Gelenler!*, cit.

Islamist revolution since taking power in 2002. AKP party and its policy makers have frequently been labeled as pragmatic by scholars<sup>39</sup>. Throughout the years, AKP initiated its own version of one-party social and political engineering and adopted an authoritarian tone, most apparent in the prosecution of journalists, Kurdish politicians and student activists. «Turkey is reported to have more journalists in prison than any other country in the world, and hundreds of other writers and private citizens have been sued for insulting the Prime Minister»<sup>40</sup>. Mardin has focused attention on the practice of enforcing communal norms, namely, «neighborhood pressure» [mahalle baskısı]<sup>41</sup>, by which he sought to capture the collective gaze of Turkey's rising peripheral conservative social class in the form of the unofficial and communal pressure brought on individuals to conform to the religious-conservative norms in their everyday lives. A recent study on this phenomenon conducted by Toprak and others<sup>42</sup> has revealed that one of the potential threats against the nurturing and sustaining of a liberal environment in Turkey is this neighborhood pressure, which is extensively exploited by AKP government for the empowerment and the dissemination of conservative ideology in daily practices.

This political climate exerts an invisible, systemic structural censorship, which, to use Bourdieu's term, is realized in the form of legitimizing or delegitimizing discourses, and the governing of the «proper» form of expression within the framework of a newly formed habitus. Considering the concept of censorship as an imposition of form, insistence of an authorial voice on being recognized in some way, Bourdieu underlines that

this structural censorship is exercised through the medium of sanctions of the field, functioning as a market on which the prices of different kinds of expression are formed; it is imposed on all producers of symbolic goods, including the authorized spokesperson, [...] and it condemns the occupants of dominated positions, either to silence or to shocking outspokenness<sup>43</sup>.

<sup>39</sup> İ.D. Dağı, *Islamic Political Identity in Turkey: Rethinking the West Islamic Political and Westernization, Research Report. Open Society Institute International Policy Fellowship Program*, 2002, <<http://pdc.ceu.hu/archive/00001804/01/Dagi.pdf>>, (last accessed: February 15<sup>th</sup>, 2015); G. Çavdar, *Islamist new thinking in Turkey: a model for political learning?*, «Political Science Quarterly», vol. 121, n. 3, 2006, pp. 477-497; Z. Öniş, E.F. Keyman, *Turkey at the polls: a new path emerges*, «Journal of Democracy», vol. 14, n. 2, 2003, pp. 95-107.

<sup>40</sup> K. Fabbe, *Doing more with less: the Justice and Development Party (AKP), Turkish elections, and the uncertain future of Turkish politics*, «Nationalities Papers», vol. 39, n. 5, 2011, pp. 657-666 (quote p. 664).

<sup>41</sup> Ş. Mardin, *Religion, Society, and Modernity in Turkey*, Syracuse, Syracuse University Press, 2006.

<sup>42</sup> B. Toprak *et alii*, *Türkiye'de Farklı Olmak: Din ve Muhafazakarlık Ekseninde Ötekileştirilenler* [Being Different in Turkey: Those otherized along the axis of Religion and Conservatism], İstanbul, Boğaziçi University Open Society Foundation, 2009 (in Turkish).

<sup>43</sup> Bourdieu, *Language and Symbolic Power*, cit., p. 138.



Structural censorship practices have significant areas of manifestations and are not confined to one particular linguistic, legal or political mode in Turkish context. As a natural artifact of the rejection of the Western paradigm of modernization, the development of pro-Islamist children's literature gained momentum along with the construction of a conservative discourse in both Turkish and translated books. As the hegemony of Islamic circles in Turkish society expands, an old vehement dispute was reignited, situated along the axis of laicist, western-oriented modernism vs Islamist traditionalism polarization. Islamic society engineering, in which the ruling AKP has been engaging, was originally derived from this historical polarization. Islamic indoctrination of the AKP government has been conducted as a counter reply to assertive state secularism of republicans and has become a common voice of those who rejected the Western paradigm of modernization imposed by the Kemalist regime<sup>44</sup>. Political tensions were foregrounded and came explicitly to the surface in the issue of children's literature with the identification of a series of manipulative attempts in the 100 Essential Readings. These involved a strong trend towards Islamization and de-christianization through the removal of Christian motifs.

## *2. Recent Echoes from the Politically Polarized Children's Literature: The Case of 100 Essential Readings Lists and Others*

The Ministry of Education issued two separate lists of «100 Essential Readings», comprising canonized children's and world literature as well as Turkish classics, recommended to both secondary and primary school children in summer 2004 and 2005, respectively. The primary reasons for preparing these lists were to stimulate primary and secondary school students to read as an extra curriculum activity, to integrate the listed works into the syllabuses of Turkish language and Turkish literature courses, and to make a contribution to the promotion and understanding of other cultures (see Appendices I and II for 100 Essential Readings lists).

In August 2006, a scandal concerning the distorted versions of the world's classics on 100 Essential Readings lists was unveiled by Radikal Daily, a leftist newspaper in Turkey. The translated books in these lists were criticized for imposing religious ideology through the translation processes, which included ideologically-oriented manipulations, namely a strong Islamization in the form of selective lexicalization and semiotic and semantic desecularization. The rigorous and continued criticism in the newspapers put pressure on the government authorities to appear on television to answer the accusations, and

<sup>44</sup> Dağı, *Islamic Political Identity in Turkey: Rethinking the West Islamic Political and Westernization, Research Report. Open Society Institute International Policy Fellowship Program*, cit.

forced many versions of these books to be withdrawn from the market. Strong criticism of Islamic domestication was also echoed in conservative circles and forced several conservative publishing houses to defend themselves from the accusations and repudiate any involvement in a hidden agenda, with the claim that their lexicalization is a natural reflection of colloquial language. Since these deviant versions of the classic books bear the logo of Turkish Ministry of Education, designed to assure the quality and reliability for broader public, this suggests that these books had in fact been approved and recommended to school children by the Ministry. Hence, the secure status of Western classics established under the auspices of AKP Ministry has further encouraged Islamic circles to both publish and buy these books.

Different articles<sup>45</sup> threw the case into sharp relief by highlighting clear examples of the manipulations. For instance, in a translation of Collodi's work, Pinocchio says «Give me some bread, for the sake of Allah», and gives thanks to «Allah» when he becomes an animated marionette. In Dumas' «Three Musketeers», while on his way to see Aramis, D'artagnan is stopped by an old woman who clearly states: «You can't see him right now. He is surrounded by men of religion. He converted to Islam after his illness». In Spyri's Heidi, the statement «praying is relaxing», attributed to Clara's Grandmother Ms. Sessemann, is added to the translated text. The grandmother is portrayed as a Muslim lady with a headscarf<sup>46</sup>.

In almost all distorted versions, the following two strategies are used: First, Islamization by building up a religious discourse absent from the original texts through the collocation of Muslim lexicalization, such as sadaka [alm], ahiret [after-life], sevap [good deed], günah [sin], şükretmek [To praise and thank Allah], af dilemek [to appeal for Allah's mercy], ibadet etmek [to pray for Allah] etc. In Turkish, «Allah» refers to a unique concept of god within Islamic context, while Tanrı is used to indicate god in a non muslim, polytheistic context. The strategy involves replacement of Christian formulaic expressions having religious connotations with Islamic ones such as «Allah sizden razı

<sup>45</sup> İ. Berkan, *Bir varmış, bir yokmuş, Allah'ın kulu çokmuş* [Once upon a time, Allah had many servants], <<http://www.radikal.com.tr/haber.php?haberno=196217>> (last accessed: March 8<sup>th</sup>, 2014) (in Turkish); Id., *Pinokyo'ya Allah rızası için bir parça ekmek* [A piece of bread for Pinokyo, for God's sake], <<http://www.radikal.com.tr/haber.php?haberno=196497>> (last accessed: March, 1<sup>st</sup>, 2014) (in Turkish); U. Aktaş-Salman, *Hayırlı sabahlar Hans!* [Blessed morning Hans!], (last accessed: August 19<sup>th</sup>, 2006, <<http://www.radikal.com.tr/haber.php?haberno=196195>> (last accessed: March 1<sup>st</sup>, 2013) (in Turkish); E. Boztepe, *Victor Hugo'yu da hidayete erdirdiler* [Victor Hugo "became a Muslim, too], <<http://www.radikal.com.tr/haber.php?haberno=196801>> (last accessed: March 1<sup>st</sup>, 2014) (in Turkish); M. Moore, *Pinocchio and friends converted to Islam* <<http://www.telegraph.co.uk/news/1527697/Pinocchio-and-friends-converted-to-Islam.html>> (last accessed: May 1<sup>st</sup>, 2013).

<sup>46</sup> D. Güçer, *Heidi kitabındaki başörtü Akşam'a 'pes' dedirtti* [Headscarf in Heidi flabbergasted Akşam], <<http://www.haber7.com/kultur/haber/279926-heidi-kitabindaki-basortu-aksama-pes-dedirtti>>, (last accessed: March 1<sup>st</sup>, 2013) (in Turkish).

olsun» [May Allah be pleased with you], «Aman Yarabbi/Allahım!» [Oh my Allah!], «Allah rızası için» ([for Allah's sake]. The second strategy used is de-christianization by means of image desecularization and lexical engineering. Image desecularization involves the subversive processes of extreme semantic shifting by the replacement of western style clothing with clothing having strong Islamic references. Birkan-Baydan<sup>47</sup> underlines Gepetto's hat, transformed into a takke [skullcap] in the Islamic retranslations of Pinocchio, which became the target of heavy criticism from the secularist front, because the skullcap is specifically worn by men engaged in religious duties in Islam. Similarly, Kansu-Yetkiner's<sup>48</sup> study on three Islamized versions of Eleanor H. Porter's Pollyanna, published by three different Islamic publishing houses, exemplifies the depiction of widow Benton in the translated version, in which a semantic desecularization occurs by the replacement of a neckerchief [fular] with headscarf [e arp]. Namely, while Widow Benton was depicted as wearing the scarf around her neck in the source text, it was transformed into a headscarf in conformance with the Islamic faith. Through textual engineering, de-christianization is achieved by the removal of Christian motifs and words relating to Christian faith and worship, such as church, priest, Bible, Sunday school etc. In Twain's Adventures of Tom Sawyer, «the Sunday School» and the related religious content are either entirely deleted or reflected as a secular school, for which Tom is studying his homework rather than memorizing verses from the Bible. Furthermore, religiously-laden words tend to be represented as a superior order or category within their system of classification. For instance, the words church, priest, Bible are replaced by house of prayer, religious functionary, and Holy Scripture, respectively. Kansu-Yetkiner<sup>49</sup> further elaborated on the cognitive dimensions of Islamic manipulation by focusing on a fragmenting discourse of Us (Muslims) vs Them (Christians), reproduced in publishers' peritexts in the 100 Essential Readings. Apart from above mentioned content-based inner text manipulations, she highlights the construction of an anti-Western (and pro Islamist) prejudiced ideology in peritexts which is in process regardless of the content of the actual literary works themselves.

In addition to the 100 Essential Readings issue, the pro-Islamist AKP has been engaged in a profound transformation in the education system designed to install an Islamic ideology which nourishes its doctrine of moderate Islam.

<sup>47</sup> E. Birkan Baydan, *Visibility of Translation through Conflicting Ideologies: The Islamic Retranslations of 100 Essential Readings*, MA. Thesis, Department of Translation and Interpreting Studies, (Supervisor: Şebnem Bahadır), İstanbul, Boğaziçi University, 2008.

<sup>48</sup> N. Kansu-Yetkiner, *Manipulation of Gendered Discourse in Translation: The Case of Pollyanna in Turkish*, in O.H.C. Haroon, H. Ghani, A.A. Ghani (edd.), *The Sustainability of the Translation Field*, Kuala Lumpur, Malaysian Translator's Association, 2009, Vol. 42, pp. 421-434 (432).

<sup>49</sup> Id., *Words Apart, Worlds Apart: Peritexts from Islamized Translations of World Classics in Children's Literature*, «Children's Literature in Education: An International Quarterly», vol. 45, n. 4, 2014, pp. 340-353.

Correspondingly, in January 2013, the conservative mentality set a new landmark in the controversy over whether to censor both John Steinbeck's «Of Mice and Men», and also «My Sweet Orange Tree» by Brazilian writer José Mauro de Vasconcelos, on the grounds of obscenity and immorality<sup>50</sup>. In the same year, poems in literature text books by three prominent Turkish poets found to have vulgar content demeaning Islam were censored through the distortion and omission of stanzas. While some words, such as «beer» and «kiss» were deleted, others were converted, for example, the word «Tanrı» which is commonly used in Christian and polytheistic contexts, was changed to «Allah», the name of God in the Muslim context. Moreover, on the grounds of obscenity, the verb «sevişmek» [to make love] was replaced by «sevmek» [to love]<sup>51</sup>.

Images of human genitalia in sixth grade science and technology textbooks were removed from some school textbooks, stirring a new debate on censorship and the imposition of a conservative agenda. Images in a chapter titled «Reproduction, Growth and Development in Living Beings» had been controversially replaced with photos of a mother and a baby, as well as animals with attractive appearance, such as polar bears<sup>52</sup>.

Within the framework of these political dynamics and created habitus, being encouraged by advantaged political changes, Islamic publishing houses became aware of the manipulative potential of Western classics, and adapted themselves to the needs of newly defined reader group, and thus were able to shift from the periphery to the center of the Turkish cultural and literary polysystem<sup>53</sup>. In other words, as Göle formulated, «Islam moves into public life and attempts to redesign the borders between private and public, religious and secular domains, and thereby challenge the modern secular and democratic definitions of the public sphere»<sup>54</sup> and thus creates a fertile ground for structural censorship practices. Translations are, therefore, employed as both repressive and productive tools by which certain ideological, aesthetic and cultural understanding of an imposed reality is formed and sustained.

<sup>50</sup> K. Genç, *John Steinbeck attracts the Wrath of Parents in Turkey*, <<http://www.guardian.co.uk/books/2013/jan/11/john-steinbeck-turkey-of-mice-men>> (last accessed: May 27<sup>th</sup>, 2013).

<sup>51</sup> E. Atabilen, *Şairlerimizin dizelerine dokunmayın!* [Don't touch the lines of our poets], <<http://www.hurriyet.com.tr/kultur-sanat/haber/22684860.asp>> (last accessed: March 1<sup>st</sup>, 2015) (in Turkish); İ. Afacan, *Entelektüel kaynaklar kurutuluyor* [Intellectual resources are destroyed], <<http://www.evrensel.net/haber/50958/entelektuel-kaynaklar-kurutuluyor>> (last access: March 27<sup>th</sup>, 2015) (in Turkish).

<sup>52</sup> E. Ülkar, *Genitalia wiped out of some Turkish school books*, <<http://www.hurriyetdailynews.com/genitalia-wiped-out-of-some-turkish-school-books.aspx?pageID=238&nlID=74193&NewsCatID=341>> (last accessed: March, 17<sup>th</sup>, 2015).

<sup>53</sup> Neydim, *Erdal Öz ile çocuk edebiyatını kullanmak üzerine*, cit.; A.B. Karadağ, *Çevirinin 'ideolojik' doğası* [The ideological nature of translation], <[http://www.radikal.com.tr/ek\\_haber.php?ek=r2&haberno=6227](http://www.radikal.com.tr/ek_haber.php?ek=r2&haberno=6227)> (last accessed: March 1<sup>st</sup>, 2013) (in Turkish).

<sup>54</sup> N. Göle, *Islamic Visibilities and Public Sphere*, in N. Göle, L. Ammann (edd.), *Islam in Public: Turkey, Iran and Europe*, Istanbul, Bilgi University Press, 2006, pp. 3-44 (quote pp. 3-4).

## *Conclusion*

Located at the core of both the formal and the hidden curricula, children's literature is deeply affected by the external ideological forces which play a crucial role in the inclusion and reproduction of the dominant culture and its associated ideological cognitions as the artifact of schooling and education in the preparation of children for society. In this study, the promulgation of ideologies in children's literature, with reference to contextualization of censorship practices, is formulated with a focus on political pendulum of Turkey swinging between Republican mentalities and pro-Islamist conservative ideology.

In the early republican period (1920s), policies that centralized power were perceived to be essential to deal with a number of threats to young republic. After the multi-party period in the late 1940s, however, factors including the great security threat, and the pre-war and post-war political climate galvanized the already-existing tendencies and mechanisms of censorship into enforcing further restrictions in order to maximize state pressure and power. During three subsequent military interventions (1960, 1971 and 1980), censorship practices were primarily performed to accommodate and sustain state dominance, severely disrupting the fabric of democratic society. Public censorship was brought into force through reforms, and law enforcement served to reinforce government power against society and the principle of guided democracy. After the 1980s, through the gradual rise of religious sentiment, modes of censorship observed in the country shifted from public censorship to structural censorship, exerting an Islamized discourse. After Justice and Development Party came to power in 2002, the Ministry of Education announced two lists of 100 Essential Readings for secondary and primary school children, which generates a self-serving schema mirroring the created habitus of the field. Implicit textual engineering, which challenges republicans' vested discourse by promoting an Islamized and de-christianized discourse was formed by employing translation activity as an instrument of censorship. Textual manipulations and image desecularization clearly observed in canonized children's literature translated from other languages provide a resource for clarifying how indoctrination of anti-Westernist ideology and Islamist purification are constructed.

Findings revealed that censorship practices have been carried out along the axes of public censorship and structural censorship. Throughout the early republican era, an institutionalized public censorship legalized by laws, was essentially motivated by a desire to create and sustain a political system rather than to protect the minors. Although the ostensible reason has been to shield children from obscene publications, since the 1980 military intervention, ideologically-laden children's books deemed to be harmful for the ruling regime; have been banned, covered by opaque bags, blacklisted, and excluded from school libraries and curricula. Recently, the ruling Justice and Development Party has carried out a new mode of structural censorship, a

«cultural blockage»<sup>55</sup> by which transfer from foreign cultures was blocked and/or manipulated through a combination of Islamization and a de-christianization process in the retranslation of children's classics into Turkish.

It can be argued that within the framework of censorship practices, children's literature in Turkey has witnessed a hegemonic struggle between pro-western republicans and pro-Islamist conservatives in the issues of (re)writing the codes of Turkey. In other words, republican Turkey, which was intensively linked to a concept of modernity in the European sense, is now evolving in accordance with a new model rooted from a peripheral and provincial sentiment of Islam, distancing itself from Euro-centric connotations and secularist republican ideology. As the hegemony of Islamic circles in Turkish society expands, the shift of Islamic publishers from peripheral to central positions in the publishing market has made their position more marked and visible<sup>56</sup>. Hence, the development of pro-Islamist children's literature through structural censorship gained momentum along with the construction of an Islamic discourse, in both home-grown and translated books.

In the light of these considerations, it is plausible to conclude that the centrally planned and controlled early republican regime operating in accordance with the norms offered under the patronage of the state officials has gone towards a new paradigm of moderate Islam. The pro-Islamist AKP regime, requiring an axis shift in state politics and implementations, has thus challenged the republican status quo, and seemingly replaced public censorship practices laid down by early republican regimes with systemic, discursive structural censorship practices, denoting a major reversal in the approach to state control.

Appendix I (only translated books were included due to space limitation)

*List of translated children's/world literature in 100 essential readings recommend to primary school children by Ministry of Education*

#### WORLD LITERATURE

1. Küçük Pren (The Little Prince) (A. de Exupery) (removed from the list)
2. Şeker Portakalı (My Sweet Orange Tree) (Jose Mauro de Vasconcelos)
3. Oliver Twist (Charles Dickens)
4. Alice Harikalar Ülkesinde (Alice in Wonderland) (Lewis Carrol)

<sup>55</sup> D. Merkle, *Censorship*, in Y. Gambier, L. van Doorslaer (edd.), *Handbook of Translation Studies*, Amsterdam-Philadelphia, Benjamins, 2010, Vol. I, pp. 18-21 (quote p. 19).

<sup>56</sup> E. Daldeniz, *Islamic Publishing Houses in the Course of Transformation – The Role of Translation in these Processes*, «Translation Studies Journal», vol. 3, n. 2, 2010, pp. 216-230.

5. Gülliver'in Gezileri (Gulliver's Travels) (Jonathan Swift)
6. Define Adası (Treasure Island) (Robert Louis Stevenson)
7. Robin Hood (Howard Pyle)
8. Tom Sawyer (Mark Twain)
9. Ezop Masalları (Aesop's Fables)
10. Andersen Masalları I-II (Andersen's Fables)
11. Üç Silahşörler (The Three Musketeers) (Alexander Dumas)
12. La Fontaine'den Seçmeler (La Fontaine's Fables)
13. Pinokyo (Pinocchio) (Carlo Collodi)
14. 80 Günde Devr-i Alem (Around the World in Eighty Years) (Jules Verne)
15. İnci (The Pearl) (John Steinbeck)
16. Beyaz Yele (Rene Guillot)
17. Peter Pan (James Matthew Barrie)
18. Uçan Sınıf (The Flying Classroom) (Erich Kastner)
19. Yağmur Yağdıran Kedi (Marcel Ayme)
20. Ölümsüz Aile (Tuck Everlasting) (Natalie Babbitt)
21. Yaşlı Adam ve Deniz (Old Man and the Sea) (Ernest Hemingway)
22. Mutlu Prens (The Happy Prince)(Oscar Wilde)
23. Şamatalı Köy (The Children of Noisy Village) (Astrid Lindgren)
24. Momo (Michael Ende)
25. Heidi (Johanna Spyri)
26. İnsan Ne ile Yaşar (What Men Live by) (Leo Tolstoy)
27. Sol Ayağım (My Left Foot) (Christy Brown)
28. Hikâyeler (Stories) (Anton Çehov)
29. Değirmenimden Mektuplar (Letters from my Windmill) (Alfonse Daudet)
30. Pollyanna (Eleanor H. Porter)

## Appendix II

*List of translated children's/world literature in 100 essential readings recommend to secondary school children by Ministry of Education*

### WORLD LITERATURE

1. Kelile ve Dimne (Kelile ve Dimne)(Beydeba)
2. Devlet (The State) (Plato)

3. Sokrates'in Savunması (Apology of Sokrates) (Plato)
4. Gülistan (The Gulistan) (Sa'di)
5. Don Kişot (Don Quixote) (Cervantes)
6. Vadideki Zambak (Lily of the Valley) (Balzac)
7. Sefiller (The Miserable Ones) (Victor Hugo)
8. Faust (Goethe)
9. Robinson Crusoe (Daniel Defoe)
10. Suç ve Ceza (Crime and Punishment)(Dostoyevski)
11. Ölü Canlar (Dead Souls) (Gogol)
12. Babalar ve Oğullar (Fathers and Sons)(Turgenyev)
13. Savaş ve Barış (War and Peace)(Tolstoy)
14. Madame Bovary (Flaubert)
15. İki Şehrin Hikayesi (A Tale of Two Cities)(Charles Dickens)
16. Açlık (Hunger) (Knut Hamsun)
17. Beyaz Diş (The Iron Hill)(Jack London)
18. Gora (Fair-Faced)(Rabindranath Tagore)
19. Çanlar Kimin İçin Çalıyor (For Whom the Bell Tolls)(Ernest Hemingway)
20. Ses ve Öfke (The Sound and the Fury)(William Faulkner)
21. Drina Köprüsü (The Bridge on the Drina) (İvo Andriç)
22. Akdeniz (Mediterranean) (Panait Istrati)
23. Fareler ve İnsanlar (Of Mice and Men)(John Steinbeck)
24. Derviş ve Ölüm (Death and the Dervish)(Meşa Selimoviç)
25. Onlar da İnsandı (They Were Human too)(Cengiz Dağcı)
26. Beyaz Gemi (The White Ship) (Cengiz Aytmatov)
27. Gün Olur Asra Bedel (The Day Lasts More than a Hundred Years) (Cengiz Aytmatov)



# 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 Two\*

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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; XIX-XX<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

4. «*With the heart of a father and the zeal of an apostle*». *The magazine «Scuola Italiana Moderna», the teachers and the popular education from the Catholic intransigent positions of the late nineteenth century to the Gentile reform (1893-1923)*

The now centuries-old story of the oldest periodical published by the teachers is rooted in the intransigent Catholic circles of the late nineteenth century<sup>1</sup>. The new magazine was promoted by Giuseppe Tovini (1841-1897), responsible of the Third section of the 'Opera dei Congressi' (Action of the Congresses), which intended to give to the teachers an educational magazine in addition to «Fede e Scuola» (1892-1904), the official instrument of the 'Opera per la Conservazione della Fede nelle Scuole d'Italia' (Action for the Preservation of the Faith in the Schools of Italy). In his founder's intention the new magazine should present not too religious characteristics in order to obtain the greatest circulation among the teachers.

At first, «Scuola Italiana Moderna», entrusted to the Milanese publisher Vallardi, had to face a lot of difficulties culminating in a suspension of the publications for lack of funds and insufficient number of subscribers (about 200). Among the reasons for its failure there were undoubtedly the modest level of the magazine, unable to stand comparison with the most popular school and teachers' periodicals of the time, and the vagueness of its program and of its references to religious principles, which failed to make it a real 'Catholic magazine'.

Giuseppe Tovini, trying to avoid the failure of his initiative, decided to introduce significant changes such as the transfer of the magazine from Milan to Brescia. Moreover, the educational section was enlarged and improved, compared to the first phase of the magazine, and articles of pedagogy and education policy, education news and useful information for the teachers were added. The Brescia edition of «Scuola Italiana Moderna» was luckier, although the number of subscribers at the end of the century (around 800-900 per year on average) did not completely eliminated the uncertainty about the future of the magazine<sup>2</sup>.

At the beginning, the magazine, while maintaining its focus on educational issues, gave also a great place to a reflection on the educational and school

work of the two authors. The first part of this contribution was published in the preceding issue of «History of Education & Children's Literature», vol. 11, n. 1, 2016, pp. 97-117.

<sup>1</sup> See R. Sani, *I periodici scolastici dell'intransigentismo cattolico (1879-1904)*, in G. Chiosso (ed.), *Scuola e stampa nell'Italia liberale. Giornali e riviste per l'educazione dall'Unità a fine secolo*, Brescia, La Scuola, 1993, pp. 221-286.

<sup>2</sup> On the origins and the the XIX century period of «Scuola Italiana Moderna» see R. Sani, *Scuola (La) Italiana Moderna*, in Chiosso (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, cit., pp. 388-390. See also M. Taccolini, *Giuseppe Tovini e la nascita di «Scuola Italiana Moderna»*, in M. Cattaneo, L. Pazzaglia (edd.), *Maestri, educazione popolare e società in «Scuola Italiana Moderna» 1893-1993*, Brescia, La Scuola, 1997, pp. 53-81.

renewal in Italy. In line with the guidelines of the ‘Opera dei Congressi’ (Action of the Congresses), the magazine was in favour of the revival of the spiritualist pedagogy (referring to Lambruschini, Aporti, Rayneri) and of the full recognition of academic freedom. It also gave space to articles intended to reaffirm that the principle of every human society could not disregard the values of Christianity and to trace the profile of the ‘Christian teacher’. This teacher, as an article published in November 1894 pointed out, «should not be an impostor, a politician, an unbeliever; and should not follow false doctrines, but point out their absurdity, showing that only Christianity offers the true solution to the social question»<sup>3</sup>.

At the beginning of the twentieth century «Scuola Italiana Moderna» had to face a new crisis, this time not only economic, but connected to the more general difficulties experienced by the intransigent Catholicism and the ‘Opera dei Congressi’ – Action of the Congresses. Unlike other intransigent Catholic magazines, destined to an irreversible decline, the magazine of Brescia survived and, indeed, experienced a real revival following the decision of a group of Catholics from Brescia to set up the Publishing Company ‘La Scuola’ in order to support its publication.

«Scuola Italiana Moderna», without abandoning its great ideals and principles (freedom of education in respect of the families’ primary right of instruction, religious education in primary schools and aversion to the idea of the entrustment of primary schools to the State) that often created controversies with the Liberal Democrats and with the leaders of the Teachers’ National Union of Luigi Credaro, was able to find some new reasons for commitment, showing a sincere interest in the problems of popular education and in improving the legal and economic conditions of the teachers. It also followed with growing attention the events of the associations of teachers, opposing, on the one hand, to the secular and anticlerical positions of the UMN and, on the other, supporting initiatives aimed at creating a strong association of Catholic teachers, that was finally established after the 1906 splitting of the Catholic component of the UMN and the creation of the Association «Nicolò Tommaseo»<sup>4</sup>.

The First World War was, in many ways, a sort of ideological watershed for «Scuola Italiana Moderna», which, in line with the new feeling characterizing the Italian ecclesiastical world, gave an increasing importance to the patriotic education of the younger generation, underlining the crucial role of the Church

<sup>3</sup> G. Losio, *A proposito di una deliberazione del Congresso Magistrale di Milano*, «Scuola Italiana Moderna», vol. III, n. 3, 13 November 1894, pp. 33-34.

<sup>4</sup> See G. Chiosso, *Scuola (La) Italiana Moderna*, in Id. (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 622-627. But see also L. Pazzaglia, *L’associazionismo magistrale cattolico: la vicenda della «Nicolò Tommaseo»*, in Id. (ed.), *Cattolici, educazione e trasformazioni socio-culturali in Italia tra Otto e Novecento*, Brescia, La Scuola, 1999, pp. 529-594.

and Catholicism in the promotion of the «values at the base of the Italian nation (God, Country and Family) and in the building up of a national consciousness»<sup>5</sup>.

After the war, the paper of Brescia become one of the most influential magazines engaged in the school debate of the time, accentuated its polemic against the positivist pedagogical and didactic instances and the secular and socialist currents within the UMN. The attitude towards the educational reform of 1923 was aimed at taking all the opportunities that the new situation offered. In particular, «Scuola Italiana Moderna» expressed its agreement towards the measure which established the restoration of the religious education in primary schools and the one introducing the state exam, but expressed strong doubts in relation to other aspects of Gentile's Reform such as those concerning the centralization of school administration and the insufficient attention paid to rural schools and the fight against illiteracy. Even the new curricula for primary school prepared by Giuseppe Lombardo Radice were praised by the magazine of Brescia, traditionally critical towards the positivist science education which had dominated the Italian primary school in the last decades of the nineteenth century and in the age of Giolitti<sup>6</sup>.

In the first phase of its history, «Scuola Italiana Moderna», had different columns containing *obituaries*, considering them not only a means to stimulate the «solidarity of the suffrage» towards those members of the «great teachers' category» that «death called to eternity», but also the instrument through which the ideal 'Christian teacher' should be promoted, «so that their work can be as informative and educational as possible, on the basis of a true and solid moral inspired to a purely religious principle»<sup>7</sup>.

And the religious dimension is central in the celebration of the lives of many «teachers worn out by school» and, so, «victims of duty»<sup>8</sup>. In this regard, the frequent use, in the *obituaries*, of religious concepts and metaphors is particularly significant – *apostle / apostolate, mission / missionary, vocation, sacrifice, sacrificed victim, humility, ardent faith, sacred task, spiritual elevation, Christian charity etc.* – to describe the qualities of the teachers and their work.

So, for the teacher of Trento, Clara Canella her «teaching activity» carried out for a long time «with maternal affection» towards her students, in order to «instill in them the science and virtue» and to «educate them as worthy of

<sup>5</sup> See L. Pazzaglia, «*Scuola Italiana Moderna*» nei dibattiti politico-scolastici tra guerra e dopoguerra, in Cattaneo, Pazzaglia (edd.), *Maestri, educazione popolare e società in «Scuola Italiana Moderna» 1893-1993*, cit., pp. 107-146.

<sup>6</sup> See C. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento: il contributo di Maria Magnocavallo (1869-1956)*, Brescia, La Scuola, 2005, pp. 375-425. See also R.S. Di Pol, *Il cammino di «Scuola Italiana Moderna» tra cultura idealista e condizionamenti politici*, in Cattaneo, Pazzaglia (edd.), *Maestri, educazione popolare e società in «Scuola Italiana Moderna» 1893-1993*, cit., pp. 181-213.

<sup>7</sup> *Ai nostri lettori*, «Scuola Italiana Moderna», vol. II, n. 1, 15 May 1894, pp. 1-2.

<sup>8</sup> Smeriglio Carlo, «Scuola Italiana Moderna», vol. I, n. 3, 19 April 1893, p. 24. See also Amandola Luigi, «Scuola Italiana Moderna», vol. I, n. 7, 31 May 1893, p. 60.

the family, the homeland, the Church», was not a mere «means of subsistence, but the mission of life», carried out bearing in mind the «great ideal of a faith strengthened by mercy»<sup>9</sup>. Similarly, the reason why the teacher from Brescia Alceste Cherubini, «teacher in public schools for thirty years», can be considered the «Ideal Teacher» for her extraordinary qualities as an educator and her «exemplary modesty» can not be found in the knowledge of some educational theories, or in a particularly effective teaching method, but rather in her «lively and firm faith» which constantly inspired and supported her «educational mission» in the school<sup>10</sup>.

A similar approach characterized the *obituary* of the teacher Camilla Cornelius, «teacher in Lecco for 33 years», who was praised not only for her teaching skills and educational merits, but for the fact that she «devoted her life to the apostolate of teaching, as it was a mission received from God»<sup>11</sup>; as well as those of Chiara Maddalena Draghi from Fiorenzuola, «woman of faith» who «taught how to practice, teach and love the religion of Christ using her words and example»<sup>12</sup>; of Ferdinando Sartori from Roana, «a deeply and sincerely Christian educator»<sup>13</sup>; of Angelo Guglielmo Persenico from Chiavenna, that «carried out the noble apostolate of teaching, sacrificing himself and doing everything for his pupils»<sup>14</sup> as a good Christian; and, finally, of Carlotta Pozzesi from Sondrio, the «sacrosanct heroine of duty» who, by virtue of her deep faith, embodied «the purest ideal, that of a selflessness made up of sacrifices and without hopes of honors»<sup>15</sup>.

So, the *obituaries* published on «Scuola Italiana Moderna» in its first phase, contain few references to the cultural, pedagogical and educational competences of the disappeared elementary teachers. It should also be pointed out that in the case of male teachers not only their faith and piety, but especially their moral qualities and the civic sense showed in the profession are underlined («teacher of noble sentiments», «perfect gentleman», «tireless soldier of duty»)<sup>16</sup>, while

<sup>9</sup> *Canella Clara*, «Scuola Italiana Moderna», vol. XIV, n. 6, 18 novembre 1905, p. 34. See also *Iacometti Francesco*, «Scuola Italiana Moderna», vol. VIII, n. 9, 12 December 1899, p. 144; and *Eula don Bartolomeo*, «Scuola Italiana Moderna», vol. XIII, n. 6, 19 November 1904, p. 44.

<sup>10</sup> *Cherubini Alceste*, «Scuola Italiana Moderna», vol. XIV, n. 11, 22 December 1905, p. 93. See also *Canossi Angelo*, «Scuola Italiana Moderna», vol. XIV, n. 12, 6 January 1906, p. 101; and *Malesani Giovanni Battista*, «Scuola Italiana Moderna», vol. XIV, n. 21, 17 March 1906, p. 174.

<sup>11</sup> *Cornelio Camilla*, «Scuola Italiana Moderna», vol. XIV, n. 30, 26 May 1906, p. 245. See also *Romanini Teresa*, «Scuola Italiana Moderna», vol. XIV, n. 35, 7 July 1906, p. 545; *Astorri Maria*, «Scuola Italiana Moderna», vol. XV, n. 9, 15 December 1906, p. 70; *Businello Luigi*, «Scuola Italiana Moderna», vol. XV, n. 12, 11 January 1907, p. 92; and *Airoldi Anacleto*, «Scuola Italiana Moderna», vol. XVI, n. 23, 4 April 1908, p. 180.

<sup>12</sup> *Draghi Chiara Maddalena*, «Scuola Italiana Moderna», vol. XX, n. 33, 1 June 1912, p. 254.

<sup>13</sup> *Sartori Ferdinando*, «Scuola Italiana Moderna», vol. XXII, n. 15, 25 January 1913, p. 171.

<sup>14</sup> *Persenico Angelo Guglielmo*, «Scuola Italiana Moderna», vol. XXII, n. 38, 30 July 1913, p. 285.

<sup>15</sup> *Pozzesi Carlotta*, «Scuola Italiana Moderna», vol. XXIII, n. 4, 14 November 1913, p. 29. See also *Butti Paolina*, «Scuola Italiana Moderna», vol. XXIV, n. 10, 19 December 1914, p. VII.

<sup>16</sup> See also, for further examples: *Amandola Luigi*, «Scuola Italiana Moderna», vol. I, n. 7, 31

with reference to female teachers the prominence is given to their «maternal love» and on the qualities and «virtues of a loving mother», underlining how the figure of the mother and the maternal attitude represented, much more than «the abstract doctrines» and the «artificial teaching methods», the model and the main point of reference for the teacher who aspired to be a perfect «Christian educator»<sup>17</sup>.

«Scuola Italiana Moderna», unlike the other school and teachers' magazines of the time, gave a great space not only to the *obituaries* of primary and secondary school teachers, but also to those of some Catholic university professors. Their «unblemished model» and «brilliant example» as men of science «firmly bound to the faith of their fathers», in fact, supported the faith of primary school teachers and gave further impetus to their action in favor of the spread of Christian religion in primary and popular schools. So, for example, after the death of Luigi Olivi, professor of International Law at the University of Modena, the magazine of Brescia celebrated the deep and unblemished faith that caused lot of suffering and sacrifices to him, underlining to the readers the new model of holiness embodied by him in a difficult background such as the academic and scientific one, traditionally hostile to the Catholic religion and to the «faith in Christ»:

Prof. Luigi Olivi, another unblemished figure of Catholic scholar that disappears! He had been a professor of International Law at the University of Modena for years, where he was loved and respected. He was one of Tommaseo's friends and he always attended its Congress. [...] The practice of the Catholic faith and an honest life were firm and essential principles to him. [...] The other day the good professor died in the general mourning of those who respected him as a learned man and a Christian model: he died in the battle, almost a victim of the sublime ideal he had supported for years: to present himself to the modern society as the figure of an admirable scholar and of a saint<sup>18</sup>.

Something similar was written for the death of the philosopher Francesco Bonatelli, when «Scuola Italiana Moderna» encouraged elementary teachers to admire the inner coherence between the figure of the Christian and the scientist, as proved by the professor's biography and work. It also underlined the moral

May 1893, p. 60; *Iacometti Francesco*, «Scuola Italiana Moderna», vol. VIII, n. 9, 12 December 1899, p. 144; *Businello Luigi*, «Scuola Italiana Moderna», vol. XV, n. 12, 11 January 1907, p. 92; *Valdata Giovanni*, «Scuola Italiana Moderna», vol. XVII, n. 25, 22 April 1909, p. 191; and *Filippini Gaetano*, «Scuola Italiana Moderna», vol. XVII, n. 38, 31 August 1909, p. 292.

<sup>17</sup> See *Olivero Matteoda Maddalena*, «Scuola Italiana Moderna», vol. I, n. 3, 19 April 1893, p. 24; *Canella Clara*, «Scuola Italiana Moderna», vol. XIV, n. 6, 18 November 1905, p. 34; *Draghi Chiara Maddalena*, «Scuola Italiana Moderna», vol. XX, n. 33, 1 June 1912, p. 254; *Facchini Velia in Bertoli*, «Scuola Italiana Moderna», vol. XXII, n. 37, 15 July 1913, p. 280; *Colleoni Giovanna ved. Fontana*, «Scuola Italiana Moderna», vol. XXVI, n. 11, 30 January 1917, p. VI; *Capuz Angelina*, «Scuola Italiana Moderna», vol. XXVI, n. 28, 15 September 1917, p. 119; and *Roncati Luigia vedova Passerotti*, «Scuola Italiana Moderna», vol. XXVII, n. 12, 10 February 1918, p. VII.

<sup>18</sup> *Olivi Luigi*, «Scuola Italiana Moderna», vol. XIX, n. 21, 11 March 1911, p. 164.

strictness and the spiritual intensity that Christian religion instilled in the personality of this «old patriarch» of the Italian philosophy:

He died- the obituary of the Paduan philosopher stated- when was 81 years old, quietly, peacefully as an ancient patriarch, [...] *Francesco Bonatelli*, professor of Philosophy at the University of Padua, was not simply a spiritualist, but was an impressive opponent of positivism, in a brilliant and daring way. [...] Think that, the great philosopher was not simply a spiritualist in the generic sense of the word, but a devout Catholic, so that his figure is illuminated by a bright light, a halo of glory in the thick darkness of our times, where in the scientific field, there are higher intellects, but half consciences<sup>19</sup>.

Finally, the *obituaries* dedicated a few years later to two other great intellectuals and scholars of Catholic orientation were very similar: they were the professor of pedagogy at the University of Turin, Giuseppe Allievo, celebrated as «the man whose career was holy as an apostolate, [...] a great Christian pedagogue»<sup>20</sup>; and the historian of philosophy at the University of Bologna Francesco Acri, about whom the magazine stated: «In the years when Italy seemed not to notice him, he continued his work without discouragement, happy to serve the truth despite the insufficient awards. [...] Model scholar, a teacher, a citizen: knowing the truth and teaching it to the others was a priesthood for him»<sup>21</sup>.

In the *obituaries* published on «Scuola Italiana Moderna» in this same period, there are traces of the harsh polemic about the educational policy implemented by the liberal governments and the oppressive attitude towards Catholic teachers of certain liberal and socialist municipalities<sup>22</sup>. On the pages of the magazine of Brescia, moreover, there were a lot of references to the real «abandoned condition» of the elementary teachers, for the «scarcity of their salaries» and for their limited legal protections. This is the case, for example, of the «poor teacher Maria Giacomelli from Valdisotto Bormio», who, «after 25 years of service», paid with the scant salary of «annual L. 275», died leaving in abject poverty «her eight children, all suffering from rickets», and her husband, also seriously ill and unable to work<sup>23</sup>.

<sup>19</sup> *Bonatelli Francesco*, «Scuola Italiana Moderna», vol. XIX, n. 31, 20 May 1911, p. 248.

<sup>20</sup> *Allievo Giuseppe*, «Scuola Italiana Moderna», vol. XXII, n. 36, 28 June 1913, p. 272. See also with reference to the biography of Giuseppe Allievo: «Scuola Italiana Moderna», vol. XXII, n. 37, 15 July 1913, pp. 306-309.

<sup>21</sup> *Acri Francesco*, «Scuola Italiana Moderna», vol. XXIII, n. 6, 29 November 1913, pp. 43-44.

<sup>22</sup> It is worth mentioning, in this regard, the curious message published in the *Piccola posta* of «Scuola Italiana Moderna» in March 1907: «Twenty-years-old teacher with higher license, victim of the persecution by socialist governments, is looking for a job (starting from the next school year) in some Pius Institute or Catholic Bording school. Educated in a religious boarding school, she plays the piano rather well» (*Piccola Posta*, «Scuola Italiana Moderna», vol. XV, n. 18, 2 March 1907, p. 140).

<sup>23</sup> *Giacomelli Maria*, «Scuola Italiana Moderna», vol. XIV, n. 33, 16 June 1906, p. 269.

Since the early twentieth century, the issue of the teachers' associations and their battles to «claim the inviolable rights of the category» is also discussed for the first time in the *obituaries* for the disappeared teachers. In particular, at the beginning, the belonging to the UMN, before its «degeneration» in a secular and anticlerical sense, and especially to the Teachers' Association «Nicolò Tommaseo», became a qualifying element of the experience of the primary school teachers, so that it represented the basis of the teachers' identity.

In this sense, we are not surprised by the emphasis with which, in commemorating the work of the Genoese teacher Giambattista Caprile in the elementary schools during his active professional career, his role as the «worthy president of the *Unione Magistrale Ligure* – [*Teachers' Union of Liguria*] was underlined and, more generally, by the celebration of his long commitment in the teachers' associations, ended only with his sudden disappearance («Caprile did not rest, he died in battle as a soldier, he died on the field!»)<sup>24</sup>.

Similarly, the humble but tenacious teacher of Saluggia, «Miss Luigia Barberis», cultured and kind activist in the «Section of Vercelli of the Nicolò Tommaseo Union», was remembered for having been among the pioneers of the Catholic teachers' associations, giving her name, and contributing to the creation of the 1<sup>st</sup> association gathering a lot of brave champions of the Christian sentiment»<sup>25</sup>.

The belonging and, even more, the direct involvement and the real activism in the local and provincial sections of the Nicolò Tommaseo Union were, therefore, title of honor and the main distinguishing factor for the majority of the disappeared teachers remembered with an *obituary* on the pages of «*Scuola Italiana Moderna*» in the first two decades of the twentieth century<sup>26</sup>.

In some cases, the teachers' role and their particular commitment in the birth and success of Catholic associations was particularly underlined, so as to prevail on the narration of the teaching experience lived in the classroom. The elementary teacher Pietro Canossi from Brescia, for example, was celebrated for his belonging «to the Teachers' Union since it was the only existing organization», but also for his opposition, as «a believer and churchgoer», to the secular and anticlerical orientation of Credaro's association («It was always clear to all his

<sup>24</sup> *Caprile Giambattista*, «*Scuola Italiana Moderna*», vol. XVII, n. 26, 1 May 1909, pp. 198-199.

<sup>25</sup> *Barberis Luigia*, «*Scuola Italiana Moderna*», vol. XVII, n. 14, 23 January 1909, pp. 110-111.

<sup>26</sup> See, as examples: *Valdata Giovanni*, «*Scuola Italiana Moderna*», vol. XVII, n. 25, 22 April 1909, p. 191; *Cerra Elena*, «*Scuola Italiana Moderna*», vol. XVIII, n. 20, 12 March 1910, p. 151; *Venturino Severina*, «*Scuola Italiana Moderna*», vol. XX, n. 7, 25 November 1911, pp. 53-54; *Persenico Angelo Guglielmo*, «*Scuola Italiana Moderna*», vol. XXII, n. 38, 30 July 1913, p. 285; *Malossi Giuseppe*, «*Scuola Italiana Moderna*», vol. XXIV, n. 27, 8 May 1915, p. VI; *Viola Urbana*, «*Scuola Italiana Moderna*», vol. XXIV, n. 37, 15 August 1915, p. VI; *Mancini Iginia*, «*Scuola Italiana Moderna*», vol. XXVI, n. 20, 10 May 1917, p. VIII; *Garelli Maria*, «*Scuola Italiana Moderna*», vol. XXVIII, n. 8, 20 December 1918, n. 8, p. VIII; *Cerquetti Rosina*, «*Scuola Italiana Moderna*», vol. XXIX, n. 28, 25 September 1920, p. VI; and *Bianchini Maddalena*, «*Scuola Italiana Moderna*», vol. XXX, n. 9, 18 December 1920, p. 127.



proud opposition to the secularization that was the primary purpose of the Union»), before becoming one of the promoters of the division of the Christian current from the UMN and of the creation of «Nicolò Tommaseo» Union<sup>27</sup>.

Similarly, if, on the one hand, the «tireless» teacher Calogero La Paglia Sveglia, «director of the elementary schools in Caltanissetta», was always «a committed supporter of the need of a Christian address in the class organization» and, therefore, he was «a strong supporter» and a fundamental point of reference for the local section of the «Nicolò Tommaseo» Union<sup>28</sup>; on the other, the initiatives of the teacher of Boves (Cuneo), Quintina Stoppa, and of that of Varese, Elena Nazzani, were equally important and crucial.

The former was celebrated for her «manly Christian education» that brought her to conceive the commitment to the «economic and legal improvement of the teachers' class» as a duty and a responsibility typical of each teacher and so, by virtue of such a conviction, she «had given her friendly support to *N. Tommaseo Union*»<sup>29</sup>; the latter, the teacher Nazzani, was celebrated because, with her death, the «Nicolò Tommaseo» Union lost «its most active propagandist», who, «deeply convinced that the religious principle must inform the educational work», was for a long time «the true apostle of our association, who was able to rise and flourish in the midst of continuous difficulties»<sup>30</sup>.

From the years of World War I, «Scuola Italiana Moderna», in line with the new feelings characterizing the Italian ecclesiastical world, dismissed the traditional intransigent positions to arrive to a conception of Catholicism firmly connected to the national and patriotic values. A conception that the magazine would maintain, as we will discuss later, even after the advent of Fascism (1923).

In this regard, the *obituaries* particularly emphasized the civil and patriotic virtues of the disappeared teachers and their role in the promotion of a national identity and of the love for the country among the younger generation. So, for example, the «venerable teacher Ignazio Donizetti» from Sotto il Monte (Bergamo) was celebrated for his being a «living symbol of self-sacrifice and affection towards the children of the people»: he dedicated his entire life to his students' education to «the love of religion and of the fatherland»<sup>31</sup>. Similarly, the «humble and talented teacher» from Trentino Maria Garelli, was celebrated not only for her being, during her whole life, «a passionate and enthusiastic educator to the highest ideals of religion and of the fatherland» but also because she succeeded, «in difficult times», to «maintain the prestige of the purest national ideals in our schools»<sup>32</sup>.

<sup>27</sup> *Canossi Pietro*, «Scuola Italiana Moderna», vol. XXI, n. 7, 30 November 1912, p. 56.

<sup>28</sup> *La Paglia Sveglia Calogero*, «Scuola Italiana Moderna», vol. XXVII, n. 17, 10 April 1918, p. V.

<sup>29</sup> *Stoppa Quintina*, «Scuola Italiana Moderna», vol. XXVIII, n. 7, 10 December 1918, p. VI.

<sup>30</sup> *Nazzani Elena*, «Scuola Italiana Moderna», vol. XXVIII, n. 9, 10 January 1919, p. VII.

<sup>31</sup> *Donizetti Ignazio*, «Scuola Italiana Moderna», vol. XXVI, n. 20, 10 May 1917, p. VIII.

<sup>32</sup> *Garelli Maria*, «Scuola Italiana Moderna», vol. XXVIII, n. 8, 20 December 1918, p. VIII.

Finally, the obituary for the elementary teacher of Torre Belvicino (Vicenza), Teresa Sala, was very similar: the «exemplary teacher» «devoted 43 years to the religious, moral and intellectual education of almost three generations», creating good children for the families and good citizens for the country»<sup>33</sup>.

5. «*In the happy historical moment of an Italy renewed in its spirit and institutions*». *The fascist period and the teachers' ideal advocated in the obituaries published on «I Diritti della Scuola» and «Scuola Italiana Moderna»*

The columns dedicated to the *obituaries* published on the major Italian school magazines in the period between the wars are, undoubtedly, an important point of reference for evaluating the times, features and impact of the Fascism on the teachers' category and on the primary and popular school, as well as a significant test for identifying the evolution, compared to the traditional nineteenth-century models, of the role and characteristics of the elementary teacher in the Italian school and society.

In this sense, the comparison between the *obituaries* published on a magazine such as «Scuola Italiana Moderna», representative of the confessional teachers' and school world, and those published on the equally authoritative and combative laic magazine «I Diritti della Scuola» (1899-1994), an expression of the radical-democratic teachers' and school environments, is particularly interesting<sup>34</sup>. The latter, born at the end of the nineteenth century, constituted, throughout the first two decades of the twentieth century, a kind of laic counterbalance to the secular «clerical battles» of the magazine of Brescia. In fact, it supported the UMN, even after the division of the Christian current and the birth of the «Nicolò Tommaseo» Union, and the parliamentary initiatives for the entrustment of the elementary schools to the State, culminated with the Daneo-Credaro law (1911), and, finally, it encouraged the attempts of the radical-democratic and socialist parliamentary groups to promote the total secularization of primary and popular education, as on the occasion of the famous debate in the Chamber of Deputies on the so-called motion *Bissolati* (1908)<sup>35</sup>.

It is worth pointing out that, even until the mid-thirties, there were not direct or indirect references to Fascism in the *obituaries*, nor to its ideals and

<sup>33</sup> Sala Teresa vedova Tozzo, «Scuola Italiana Moderna», vol. XXXIV, n. 8, 6 December 1924, pp. X-XI.

<sup>34</sup> On «I Diritti della Scuola» (1899-1994) see: R. Sani, *I Diritti della Scuola*, in Chiosso (ed.), *I periodici scolastici nell'Italia del secondo Ottocento*, cit., pp. 145-147; and G. Tognon, *I Diritti della Scuola*, in Chiosso (ed.), *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., pp. 234-239.

<sup>35</sup> See L. Pazzaglia, *La scuola fra Stato e società negli anni dell'età giolittiana*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società nell'Italia unita. Dalla Legge Casati al Centro-Sinistra*, Brescia, La Scuola, 2001, pp. 171-211.

orientations. In celebrating the memory of the disappeared teachers, in this regard, both «Scuola Italiana Moderna» and «I Diritti della Scuola» revealed, in fact, a substantial – and very surprising – non-involvement to the values and slogans of Mussolini's regime, continuing to advocate on their pages a model of teacher and of an elementary school deeply different and independent from that supported by the fascist propaganda.

In the case of the *obituaries* published on «Scuola Italiana Moderna», for example, after the real centrality given by the Gentile reform of 1923 to the cultural and professional competence of the teachers, a new attention was paid to the «teaching skills», to the «competence in the teaching art» and to the possession of an «effective teaching method»: a series of issues that, in contrast with the past, became definitively part of the ideal profile of the «good Christian teacher»<sup>36</sup>.

It is true, however, that this ideal profile would have acquired a real substance only thanks to the *religious* dimension, the one that identified the ideal teacher with the «good Christian», and the *patriotic* one, according to which the ideal teacher was necessarily a «good Italian», capable of educating his students to «patriotism» and Italian «values»<sup>37</sup>.

During the twenties and throughout the first half of the next decade, in this regard, the *obituaries* published on «Scuola Italiana Moderna» still aroused the attention and the memory of the living people on «the magnificent figure of the Christian educator», embodied by several teachers who, with «humility, selflessness and nobility», made the primary school a place of education to the «faith in God» and «the love of the Fatherland».

So, the municipal teacher of Zevio (Verona), Guglielmo Andreoli, was celebrated as a proof of Christian faith transmitted through teaching and for the fact that, by virtue of this faith, he was respected by the people of his small village and «considered a saint»<sup>38</sup>; similarly, the «very religious» primary teacher of Barbata (Bergamo), Antonietta Neri, was celebrated as «a model educator for the quality of her life and for her absolute devotion to school»<sup>39</sup>, and her colleague of Zubiena Biellese (Novara), Maria Verdola, was considered «the most perfect model of a true Teacher»<sup>40</sup>, by virtue of her constant and consistent faith.

<sup>36</sup> See for further examples: *Lazzari Teresa*, «Scuola Italiana Moderna», vol. XXXV, n. 1, 10 October 1925, p. XII; *Neri Antonietta*, «Scuola Italiana Moderna», vol. XXXV, n. 15, 30 January 1926, p. XII; and *Marinoni Maria*, «Scuola Italiana Moderna», vol. XXXIX, n. 32, 31 May 1930, p. XIV.

<sup>37</sup> See *Resurgent*, «Scuola Italiana Moderna», vol. XLV, n. 17, 10 March 1936, p. XV; and *Resurgent*, «Scuola Italiana Moderna», vol. XLV, n. 20, 20 April 1936, p. XV.

<sup>38</sup> *Andreoli Guglielmo*, «Scuola Italiana Moderna», vol. XXXV, n. 14, 23 January 1926, p. XIV.

<sup>39</sup> *Neri Antonietta*, «Scuola Italiana Moderna», vol. XXXV, n. 15, 30 January 1926, p. XII.

<sup>40</sup> *Verdola Maria*, «Scuola Italiana Moderna», vol. XXXV, n. 24, 17 April 1926, p. XIV.

For further examples of this attitude, think to the teacher of Canicattì (Girgenti) Giuseppe Ferranti, «exemplary citizen and distinguished educator of several generations to the love God and of the Country»<sup>41</sup>; to the headmaster of Lucca, Adolfo Barsanti, «noble figure of educator, teacher of teachers, citizen, and scholar», who was celebrated for his extraordinary work «inspired and supported by a deeply felt and lived Christian faith»<sup>42</sup>; and, finally, to the elementary school teacher and former «director of the Teachers' National Union», Lanfranco Abate of Crocemosso (Novara), who, after his long work in the socialist teachers' organizations of Novara, in the last phase of his life came «back to the Faith», ending «his very hardworking life with a peaceful death, comforted by the sacraments and by the vision of an eternal rest without partisan struggles»<sup>43</sup>.

Among the many *obituaries* published on «Scuola Italiana Moderna» at the turn of the twenties and thirties, there were some advocating an ideal of teacher not only deeply rooted in the tradition of the Church and Catholicism, but also very different- and in some ways antithetical- compared to the system of values of Mussolini's regime. This is the case, for example, of the primary school teacher Cesira Dossi from Milan, director of the Municipal School Chiara d'Assisi and «active member of many Catholic institutions and of the direction of the Catholic Action of the Diocese». Her *obituary*, published in March 1930, gives us a profile of a primary school teacher totally distant from the influences of the fascist ideology and propaganda:

On the 27<sup>th</sup> of February – the magazine of Brescia stated – Cesira Dossi [...] ended with an edifying death her hard-working life that may be defined a holocaust on the altar of God for the triumph of his Kingdom and for the salvation of souls. She came from a Milanese and popular family. [...] She was a teacher with a deep culture, enlightened by a faith made up of science and fervour, of religious practice, she gave to the school all the warmth of her soul of an apostle. The years were difficult at those times! She experienced a suffering that can not be explained except by those who have tried it: she saw in every child entrusted to her cares a soul dear to God, redeemed by the blood of Christ, created for the eternal possession of God and she had to fight against a legislation that wanted an education devoid of supernatural contents, and a totally secular school. Cesira Dossi experienced this suffering in all its painful tragic bitterness. [...] After the establishment of the *Niccolò Tommaseo* Union, the Association of Catholic teachers that God wanted into the school and that spread the love for the Italian land into the small hearts of the pupils, Cesira Dossi was soon among its members, being one of the members more operative and enlightened. [...] She was not frightened by politics, it was necessary to bring God back into society, nor by the meetings, discussions, evening lectures, the difficulties that were added to the long working days at

<sup>41</sup> *Ferranti Giuseppe*, «Scuola Italiana Moderna», vol. XXXV, n. 30, 29 May 1926, p. XII. See *Spandri Angela*, «Scuola Italiana Moderna», vol. XLI, n. 11, 5 December 1931, p. XV.

<sup>42</sup> *Barsanti Adolfo*, «Scuola Italiana Moderna», vol. XXXVI, n. 28, 14 May 1927, p. VII.

<sup>43</sup> *Abate Lanfranco*, «Scuola Italiana Moderna», vol. XXXVIII, n. 8, 17 November 1928, p. XII.

school: she was always ready to devote herself, with the fervour of an apostolic soul. [...] The real purpose of all her wonderful works was to morally redeem the society, to take care of the small sprouts, to educate the teen-agers, i.e. to create morally good and deeply believer generations<sup>44</sup>.

Bringing God back into society» through the school and «creating morally good and deeply believer generations» were not only the objectives of a distant past, that of the polemics against anticlerical liberalism and the scientific positivism of nineteenth-century, but they were the primary task and the main challenge for the Christian teachers, given also the threat represented by the fascist totalitarianism. This is testified by the numerous *obituaries* which aroused the attention of readers on the faith and commitment of those teachers who, in the previous decades, «fought against a legislation that wanted an education devoid of supernatural contents, and a totally secular school».

The real difference represented by the example of the Christian elementary teachers and their inflexibility was confirmed, for example, by the moving celebration of the «humble and strong» Milanese teacher Teresa Piazza Teresa, published on «Scuola Italiana Moderna». Her human and professional itinerary and her skills as an educator were distant from the prevailing ideology and the totalitarian rhetoric in vogue in the Italian school of the time:

Exquisite soul of teacher and fervent Christian – the *obituary* of the teacher Teresa Piazza stated – transmitted through school, until the last days of his life, the treasures of her intelligence and heart. She was good, lovely and patient, she loved her students, instructing them with valor and wisely educating them with Christian spirit. She performed her role as a teacher with serenity and humility, giving the most admirable example of a true Christian educator. [...] She was a member of the *Nicolò Tommaseo* union, from the beginning of her school career<sup>45</sup>.

So, the *obituaries* published on the magazine of Brescia in the first half of the thirties tried to underline the difference and the inflexibility of the principles and values that inspired the work of the Christian teachers, respect to the Fascist ideology and pedagogy. Not surprisingly, the *obituary* celebrating the «the nobility and greatness» of «the genuinely Christian soul» of the teacher of Bolognolo Mella (Brescia), Maria Marinoni, underlined also the fact that the teaching activity had to be lived and practiced «as a priesthood» to be performed «with dignity and conscience»<sup>46</sup>. So, in announcing the death of the headmaster of Montalto Marche, Giuseppe Bormioli, the magazine emphasized that:

<sup>44</sup> M. Magnocavallo, *Dossi Cesira*, «Scuola Italiana Moderna», vol. XXXIX, n. 22, 15 March 1930, pp. XIV-XV. See also *Pizzi Anna*, «Scuola Italiana Moderna», vol. XL, n. 25, 28 March 1931, p. XIII; *Brizio Giovanni Battista*, «Scuola Italiana Moderna», vol. XLI, n. 13, 19 December 1931, p. XV; *Guzzi Ester*, «Scuola Italiana Moderna», vol. XLII, n. 16, 21 January 1933, p. XIV; and *Cardone Lucrezia*, «Scuola Italiana Moderna», vol. XLII, n. 28, 22 April 1933, p. XIV.

<sup>45</sup> *Piazza Teresa*, «Scuola Italiana Moderna», vol. XXXIX, n. 31, 24 May 1930, p. VII.

<sup>46</sup> *Marinoni Maria*, «Scuola Italiana Moderna», vol. XXXIX, n. 32, 31 May 1930, p. XIV.

He devoted himself and all his precious energies to the noble cause of the Education and Instruction of the people's sons. He was highly respected: his virtues derived from his gaze and his frank, loyal, respectable words, that made him like a saint. He was a committed Christian and churchgoer, he was interested in the doctrine of Jesus and the practice of the Gospel above all the other interests. [...] It was always faithful to the mission of educator, considered as a priesthood, fortified by a wide and lively culture, [...] always conscientiously scrupulous in the fulfillment of His duty<sup>47</sup>.

The *obituary* for the priest and elementary school teacher of Vercelli, Father Eligio Barale, contained these same themes: he was remembered with gratitude not only for his «highly remarkable educational work», but also for the battles fought for the defense of the Christian values at school:

The teacher D. Eligio Barale – «Scuola Italiana Moderna» stated in December 1932 – died suddenly in Vercelli on the day of the Immaculate Conception, [...] He had worked in a laudable way for 37 years. He joined the elected talents of his genius to an untiring zeal in defending, in the past, the rights of a good education in the school, he was a strong champion of the glorious Association *Nicolò Tommaseo*, in the combative and numerous section of Vercelli<sup>48</sup>.

Also the *obituaries* published on «I Diritti della Scuola» did not contain, as already mentioned, direct or indirect references to Fascism and its choices in the field of school policy, at least until the mid-thirties. The traditional radical-democratic views were necessarily set aside, and the magazine founded by Guido Antonio Marcati and directed by Annibale Tona in the aftermath of the March on Rome, promoted an ideal of elementary teacher strongly nationalistic, and whose main task was to strengthen the social cohesion and the full identification of the people with the legal systems and institutions of the State.

In this regard, the emphasis on the 'secular virtues' and the 'holiness' of the role and the tasks of the teachers and the elementary school is not surprising. «I Diritti della Scuola», for example, celebrating «the high and noble figure», of the teacher of Certaldo (Florence), Francesco Marinari, underlined his commitment «to the school of the people» as an educator to the national consciousness:

His greatest passion was the school, held for forty years and understood as the moral and civic education of the children and young people entrusted to him, as the sacred task which had to be performed, anyhow, although any misfortune and trouble<sup>49</sup>.

The magazine edited by Annibale Tona stated something similar about the «brave and meritorious» teacher of S. Nicandro Garganico, Matteo Alfarano,

<sup>47</sup> *Bormioli Giuseppe*, «Scuola Italiana Moderna», vol. XLI, n. 20, 20 February 1932, p. XIII.

<sup>48</sup> *Barale don Eligio*, «Scuola Italiana Moderna», vol. XLII, n. 12, 20 December 1932, p. XV.

<sup>49</sup> *Marinari Francesco*, «I Diritti della Scuola», vol. VII, n. 28, 5 May 1929, p. 1324. See also *Ferri Ferruccio*, «I Diritti della Scuola», vol. VII, n. 22, 17 March 1929, p. 1064; *Di Fedele Giuseppe*, «I Diritti della Scuola», vol. VII, n. 25, 14 April 1929, p. 1183; and *Fedeli Giambattista*, «I Diritti della Scuola», vol. VII, n. 31, 2 June 1929, p. 1470.

suddenly disappeared «after thirty-seven years of conscientious and fruitful teaching activity»:

He gave his best work in the field of school, teachers' and working class organizations, with the spirit of a fervent educator and an upright and honest citizen. [...] He succeeded in gaining the respect of his fellow citizens, of his school family and of the school authorities, thanks to the qualities of his mind and heart and the uprightness of his character [...] Matteo Alfarano had understood that we have to cultivate the flowers of the human springs in the elementary school, where the solid spiritual roots of the future of a strong and generous people grow<sup>50</sup>.

Similarly, the teacher and former president of the Roman Teachers' Society, Carlo Galli, was celebrated for the austerity of his character, his patriotic spirit and the extraordinary sense of duty, thus becoming a real model and point of reference for his colleagues:

He was characterized by the absence of any vanity, any desire to excel, any ostentation of qualities and virtues; he was only admired for a hidden (but strong and deep) honesty. It was this honesty that imposed him to devote himself with no limitation to his work. [...] The sense of high responsibility with which he carried out his office was proved by the various institutions and associations he was part of. [...] Today he is, for all who knew and loved him, a proved and strong constant example, a warning and an instruction: first of all, the duty<sup>51</sup>.

The peculiar human and professional itinerary of some disappeared teachers was a chance for «I Diritti della Scuola» to reaffirm the centrality of the elementary and popular teaching, considered as the highest and most complete form of «laic and patriotic apostolate» for the civil and cultural progress of the country and the strengthening of the «national consciousness». In this regard, the celebration of the teacher of Catania Agatino Caraffa, «one of those men who consider their life as a mission, without ostentations, but for an inner necessity», is not surprising:

Agatino Caraffa – the obituary stated – belongs to that generation of teachers who, in the last two decades of the last century, gave a lively contribution to the educational studies and cooperated to the renewal of the school. He began to teach in our schools and abroad when he was very young and he spent there his whole fervent and passionate career, always aimed at the two great ideals of the school and the Fatherland. He was one of the first soldiers promoting the Italian spirit abroad, from Preveza to Cairo and Constantinople: he was a very talented teacher and director<sup>52</sup>.

Finally, also the *obituaries* dedicated to certain teachers meritorious for their commitment on the side of the renewal of the teaching methods or for

<sup>50</sup> *Alfarano Matteo*, «I Diritti della Scuola», vol. VIII, n. 19, 23 February 1930, p. 286. See also *Penolazzi Edmo*, «I Diritti della Scuola», vol. VIII, n. 35, 15 July 1930, pp. 551-552.

<sup>51</sup> *Galli Carlo*, «I Diritti della Scuola», vol. VIII, n. 17, 9 February 1930, p. 254.

<sup>52</sup> *Caraffa Agatino*, «I Diritti della Scuola», vol. VIII, n. 38, 31 August 1930, p. 590.

their activism in teachers' associations and in the bodies for the spread of the popular care and education are particularly important. So, while celebrating «the noble life» and «the high example» of the primary school teacher of Imola, Luigi Forchielli, the magazine directed by Annibale Tona emphasized that he embodied the «typical austere figure of the educator» who, in very difficult times, did not abandon his responsibility of promoting civic and national awareness to his students:

He came to Rome from the Marche, about sixty years ago – the *obituary* dedicated to Forchielli stated – bringing with his uncommon talent and wide culture a breath of new life, which, renewing or banishing old methods and systems, gave a new appearance to civic schools. There was no innovation in the educational field that he did not follow with loving study and that he did not apply if it seemed to him acceptable. [...] In difficult times, in which Religion and Fatherland had been banned, he was able to wisely respect and enforce the rights and duties of the school, never failing [...] its highest Italian principles<sup>53</sup>.

These same «high Italian principles of spirit», as «I Diritti della Scuola» underlined, were of inspiration for the life and the teaching activity of many other teachers disappeared during those years. It was the case, for example, of the teacher of Cerisano (Cosenza), Antonio Bevacqua, «adored by several generations of disciples», who admired him for «the integrity of his character, his uncommon culture, his infinitely good spirit»: «the school – as the magazine directed by Annibale Tona stated – found in him an apostle, an enlightened leader»<sup>54</sup>.

This was also the case, among the many other that we could mention here<sup>55</sup>, of the teacher of Carrara, Luigi Piccioni, and of the «venerable» Director of Studies of Ghedi (Brescia), Luigi Bonardi, «teacher for forty-four years in those elementary schools». The former, «died when he was eighty-eight», was remembered because he represented the «noble figure of an honest, hard-working citizen, enthusiastic about his adored homeland, an educator of many generations of his land»<sup>56</sup>. The latter, Bonardi, was celebrated for his being «an apostle of education» and «a fervent propagandist of charitable schools» so that his teaching activity aroused «wishes of moral elevation» and «noble sentiments of good citizenship and patriotism in several generations»<sup>57</sup>.

In the mid-thirties, as already mentioned, the *obituaries* published on «Scuola Italiana Moderna» and «I Diritti della Scuola» contained the first

<sup>53</sup> Forchielli Luigi, «I Diritti della Scuola», vol. IX, n. 2, 5 October 1930, pp. 21-22.

<sup>54</sup> Bevacqua Antonio, «I Diritti della Scuola», vol. IX, n. 4, 30 October 1930, p. 63.

<sup>55</sup> See in this regard: Cecchi Basilio, «I Diritti della Scuola», vol. X, n. 32, 29 May 1932, p. 498; Lisardi Guido, «I Diritti della Scuola», vol. XI, n. 9, 27 November 1932, p. 143; Fruch Enrico, «I Diritti della Scuola», vol. XI, n. 12, 18 December 1932, pp. 183-184; D'Agostino Francesco, «I Diritti della Scuola», vol. XI, n. 20, 19 February 1933, p. 300; and Marabelli Giovanni, «I Diritti della Scuola», vol. XI, n. 22, 5 March 1933, pp. 324-325.

<sup>56</sup> Piccioni Luigi, «I Diritti della Scuola», vol. X, n. 25, 3 April 1932, p. 384.

<sup>57</sup> Bonardi Luigi, «I Diritti della Scuola», vol. X, n. 34, 19 June 1932, p. 546.



generic references to Mussolini's ideology and to the Fascist regime. The magazine of Brescia, for example, reporting, in March 1934, the death of the teacher Giacinta Crudeli, who «for more than 38 years taught in the school of San Terenzo in the town of Fivizzano», stressed that her great merit was to have bestowed «the treasures of goodness and wisdom to several generations of children who later became worthy, in war and in peace, of living the happy historical moment of an Italy renewed in its spirit and institutions»<sup>58</sup>.

The reference to Fascism was much more considerable in the *obituary* published two years later, in October 1936, for the elementary teacher of the little village of Campagnola Concesio, «the worthy teacher Giuseppina Gregori», died «after forty years of intelligent, tireless charitable work, considered as a sacred mission», and celebrated for her patriotism and the «constant devotion» to the directives of the regime:

She was full of love for her country – the magazine of Brescia stated – and she devoted her noblest energies not only to the school, but also to her Country, which she loved dearly in its children, especially in the period of the Great War, the post-war and the Fascist Era<sup>59</sup>.

However, until the end of the thirties, the sometimes substantial and very detailed references to the Fascist ideology and to the regime school organizations coexisted with those to the Christian faith and to the belonging to the Catholic Action, creating an unprecedented intertwining between the resounding rhetoric of Mussolini's regime and the religious language often inspired by the humble Franciscan ideal. For example, it is not easy to understand the reasons of the «genuine support» to Fascism of the teacher of Modena Elpidio Marinelli, «active soldier of the Catholic Action» and «Franciscan Tertiary». In fact, his work as a teacher and educator, for his exquisite qualities of mind and the depth of his religious beliefs, seemed to be inspired to the charitable ideal of the great saint educators of the past than to the «masculine» and «martial» school directives of Mussolini's regime<sup>60</sup>.

Similarly, the paradoxical coexistence, in the same biographical profile, of traits and patterns appealing to the traditional ideal of the Christian educator with others which clearly allude to the new Fascist idea of the role and prerogatives of the primary school teacher is particularly significant. In this regard, the *obituary* dedicated to the teacher of Carpaneto Piacenza, Luisa

<sup>58</sup> *Crudeli Giacinta vedova Orfanotti*, «Scuola Italiana Moderna», vol. XLIII, n. 23, 24 March 1934, p. XIV. See also *Antolini Ausonia*, «Scuola Italiana Moderna», vol. XLIII, n. 31, 26 May 1934, p. XIV; and *Milesi Angelo*, «Scuola Italiana Moderna», vol. XLV, n. 7, 20 November 1935, p. XV.

<sup>59</sup> *Gregori Giuseppina*, «Scuola Italiana Moderna», vol. XLVI, n. 2, 7 October 1936, p. XV.

<sup>60</sup> *Martinelli Elpidio*, «Scuola Italiana Moderna», vol. XLVIII, n. 6, 19 November 1938, p. 240. See also *Bolognesi Cesarina vedova Scaramelli*, «Scuola Italiana Moderna», vol. XLVI, n. 32, 22 May 1937, p. XV.

Marina, is emblematic: in it, the old spiritual qualities and the new characteristics of the fascist pride coexist:

She was born with the vocation to school and ready to make any sacrifice for it, she really considered the office of education as an apostolate, devoting to it all the energies of her fervent heart and her mind opened to all the beautiful and noble things. Her mission as wife and mother did not reduce her zeal and passion for the school. [...] She was mild but proud, determined and not talkative, because she lived of actions: these were her external characteristics, while kindness, love, spirit of sacrifice were her spiritual traits. [...] She had a good and fraternal relationship with the humble people, participating in their joys and sorrows, and teaching them to love God, the homeland and the work. [...] She leaves a deep void in the fascist organizations, in which she held high offices<sup>61</sup>.

Since the mid-thirties, we can find a gradually broader reference to fascist ideals and myths even in the *obituaries* published on «I Diritti della Scuola». For example, in the biography of the R. Chief Inspector of the elementary schools in Rome, Carmelo D'Agostino, who died suddenly in January 1934, there is the first example of the fascist model teacher «all action, courage and discipline»:

He was born in Graniti, in the province of Messina, on the 20<sup>th</sup> January 1863 and, after having performed his mission as teacher and director in the schools of Frankfurt, Grammichele and Taormina with uncommon skill and with the heart of an apostle, in 1895 he began to teach in the schools of Rome. He became R. inspector five years later. [...] He was inspector, first inspector, chief inspector, but also a friend, a counselor, a facilitator for teachers and educational institutions. He encouraged the good initiatives and fought resolutely against bad habits, [...] he requested with insistence confidentiality to educators, along with an irreproachable behaviour, austerity of manners, [...] sense of responsibility. During the war he gave his help, his work, his advices and economical support, with the heart of a patriot and fascist man, reviving the hopes of the skeptics and inciting the doubters to resistance; and he was a passionate and fervent propagandist in favour of domestic loans, of the Red Cross, of the fight against tuberculosis, of the Feast of the grain, of the fascist youth groups, of the increase of school libraries, of the Mutuality, of the Action for motherhood and childhood and of all the charitable forms<sup>62</sup>.

Numerous other *obituaries* published in this same period on the magazine edited by Annibale Tona were very similar. Thus, the elementary school teacher and then Capitoline R. school inspector Pietro Sparano was celebrated as a «true fascist educator» for his efforts to «raise the teaching skills of the teachers' category»<sup>63</sup>. Similarly, the director of studies Riccardo Raggi from Romagna was celebrated for his «very Italian sentiments» transmitted «by word and example to the minds of young people» and for his being «a clear example of

<sup>61</sup> *Marina Luisa vedova Volpari*, «Scuola Italiana Moderna», vol. XLVIII, n. 9, 10 December 1938, p. 30.

<sup>62</sup> *D'Agostino Carmelo*, «I Diritti della Scuola», vol. XII, n. 15, 21 January 1934, p. 222.

<sup>63</sup> *Sparano Pietro*, «I Diritti della Scuola», vol. XVIII, n. 5, 20 November 1939, p. 78.

Italian and Fascist educator» for his colleagues and teachers of the educational circle of Cesena<sup>64</sup>.

At the end of the thirties, however, both «I Diritti della Scuola» and «Scuola Italiana Moderna» in presenting, in their *obituaries*, the profile of the «perfect fascist elementary teacher», underlined the need to go beyond the simple support to PNF and the sincere and indispensable participation in the initiatives of the school organizations of Mussolini's regime. They proposed the model of the 'soldier' of the school, the 'fighter' committed in the 'frontline' of the war against illiteracy and ignorance and for the national liberation and the «integral fascistization» of the younger generation.

No wonder, in this regard, that, that the obituary for the teacher Giuseppe Sandrone, R. Director of the Studies of Riva del Garda, whose name was «linked to the earliest movements for the fascistization of the school», celebrated in particular his 'merits' on the battlefield and as the protagonist of the «Fascist Revolution», rather than those derived from school books and in the classroom:

He was deputy general secretary of the Association of the School, provincial secretary of Milan, and then member of the national board until 1926. But Giuseppe Sandrone was also known as a valiant fighter, first in the Italo-Turkish war and then in the World War II, with the rank of Captain of Alpine troops. When he came back from the war, he became teacher in the schools of Milan and he joined the PNF in 1920: he was part of the action team "La Volante" and participated in numerous activities in and out of Milan, staying also some days in prison in Pallanza, together with his comrades, following a clash with the subversives of Intra. But the squads actions never separated him from his favorite studies. [...] He moved from the schools of Milan to those of Monza, as municipal director of studies in 1927, and after the entrustment of the schools to the state he became first inspector in Riva del Garda, where he ended his brief and laborious existence, regretted by the teachers of his district. Five war campaigns, Cross of Merit, squad member in 1920, patent of the March on Rome, fascist educator, organizer of the first scholastic Fascio! Comrade Giuseppe Sandrone! Present!<sup>65</sup>

And the case of the 'fascist' teacher and director from Riva del Garda was not isolated, but was part of a precise type of *obituaries* destined to become dominant and to be proposed again without great differences on two school magazines deeply different in their origins, ideological approach and cultural and didactic awareness such as «I Diritti della Scuola» and «Scuola Italiana Moderna», as proved by the profiles of other several elementary teachers and school officials disappeared in the late thirties. So, the magazine directed by Annibale Tona wrote about the Capitoline teacher Giuseppe Petriconi:

<sup>64</sup> Raggi Riccardo, «I Diritti della Scuola», vol. XVIII, n. 12, 10 February 1940, n. 12, p. 190. See also Bertozzi Eudoro, «I Diritti della Scuola», vol. XIV, n. 5, 10 November 1935, p. 24; Maurizi Francesco, «I Diritti della Scuola», vol. XV, n. 13, 10 January 1937, p. 200; and Capuzzi Giuseppe, «I Diritti della Scuola», vol. XV, n. 18, 14 February 1937, p. 278.

<sup>65</sup> Sandrone Giuseppe, «I Diritti della Scuola», vol. XVI, n. 2, 14 October 1937, p. 32.

He had just finished his teaching studies in Ferentino when the country wanted him among its best sons to defend its right. He, returned from the war, was in the squad troops during the Revolution. Then he held the position of Chief of the M.V.S.N. and devoted himself and all its activities to the education of the young people of the popular and hard-working Roman district of San Lorenzo<sup>66</sup>.

Similarly, on the pages of «Scuola Italiana Moderna», the teacher and «National fiduciary of the Fascist Association of Elementary School», Augusto Antonelli, was celebrated as a very strong fighter for the imperial prominence of the school». He constantly considered his profession as a «heroic endeavour for the triumph of fascist Italy» and, for this reason, he «lived in the battle»<sup>67</sup>. The magazine of Brescia praised only some aspects of the Milanese teacher Gian Francesco Marini's life and role, but they were extremely significant in relation to his belonging to Fascism:

*Gian Francesco Marini* died in Milan, after a short illness. [...] His habits and thought were enthusiastically in line with the great renaissance of the country: he fought in the Great War with the rank of captain and took part in the Revolution of the Blackshirts. He was honoured with the patent of the March on Rome and he was also one of the most generous pioneers of fascistization of the school<sup>68</sup>.

The memory published on the magazine of Brescia during the years of World War II for the teacher of Brunico, Costantino Marini, who was executed in a prison camp for his fascist faith, was more rich and varied, but contained the same themes:

Costantino Marini is a figure of a hero. He was teacher of humanities in the R. Ginnasio «Gen. A. Cantore» of Brunico, Sub-Lieutenant of the Battalion of Bolzano, XI Alpine Regiment. He was shot by the Communists of Nova Vares last year, on the 18<sup>th</sup> of December, for having been found, after 15 days of imprisonment, in possession of the card of the P.N.F. and for having proclaimed his fascist faith. [...] Marini grew up and was educated during the Fascist Revolution, so he was deeply concerned with the ideals of Fascism of which was a fervent apostle. We bow before his noble figure and pray for him, moved, so that his sacrifice will not be useless<sup>69</sup>.

Finally, also the obituary dedicated in 1940 by «I Diritti della Scuola» to the teacher and director of studies of Parma, Antonio Benzi, was particularly important. It refers, in particular, not to his 'fascist merits' but to his *naturaliter fascista* 'temper' as a man of school, so that he seems to be, also on the anthropological side, the perfect embodiment of the «new teacher» all «action, courage and discipline» supported by Mussolini's regime:

<sup>66</sup> *Petriconi Giuseppe*, «I Diritti della Scuola», vol. XVI, n. 37, 15 August 1938, p. 612.

<sup>67</sup> *Antonelli Augusto*, «Scuola Italiana Moderna», vol. XLVIII, n. 16, 11 February 1939, p. 716.

<sup>68</sup> *Marini Gian Francesco*, «Scuola Italiana Moderna», vol. XLVIII, n. 17, 18 February 1939, p. 765.

<sup>69</sup> *Marini Costantino*, «Scuola Italiana Moderna», vol. LI, n. 21, 20 May 1942, p. 620.

Antonio Benzi – the obituary said – began his job in the schools of the small towns in the Bassa padana, in Guastalla, and then moved to Parma, where he continued for many years his activity: first as a teacher, then as director, and finally ended his life at school. Parma was the city suitable for his temperament as a man of action and passion: the city of the trade-unionism and interventionism was the right atmosphere for his generous heart. [...] He was an enthralling ‘animator’. He was argumentative and chivalrously aggressive, so that you were forced to follow him, to get excited about his ideas<sup>70</sup>.

6. «He fought strenuously the holy battle for the development of the Christian ideals in school»: «*Scuola Italiana Moderna*», the teachers and the popular education in Italy during the Second World War

In the *obituaries* published on «*Scuola Italiana Moderna*» in the immediate aftermath of the World War II, and especially in the three years 1945-47, there are two different attitudes, destined to coexist for a long period in the magazine of Brescia and to influence its choices and orientations in the difficult time of the transition from Fascism to the republican democracy<sup>71</sup>.

The first attitude is linked to the celebration of the Resistance and Liberation and, in particular, to the praise of the memory and the example of so many Christian teachers become ‘rebels for love’ and murdered in the mountains by the Fascists or executed in the German concentration camps where they were sent for their refusal to join the Republic of Salò<sup>72</sup>. The column «Teachers of life after death» was dedicated to them, celebrating, since 1945, the memory of so many «partisan teachers» and «soldiers teachers» who «died peacefully, testifying their faith in Christ» and who succeeded «in instilling in the hearts of their companions the love towards God and the Motherland»<sup>73</sup> with their «heroic sacrifice».

<sup>70</sup> Benzi Antonio, «I Diritti della Scuola», vol. XVIII, n. 21, 20 May 1940, p. 327.

<sup>71</sup> On the choices and orientations of «*Scuola Italiana Moderna*» in the second post-war period see R. Sani, «*Scuola Italiana Moderna*» e il problema dell'educazione popolare negli anni del secondo dopoguerra (1945-1962), in Cattaneo, Pazzaglia (edd.), *Maestri, educazione popolare e società in «Scuola Italiana Moderna» 1893-1993*, cit., pp. 265-319; then re-published in R. Sani, *Sub specie educationis. Studi e ricerche su istruzione, istituzioni scolastiche e processi culturali e formativi nell'Italia contemporanea*, Macerata, eum, 2011, pp. 567-628.

<sup>72</sup> See. G. Bianchi, B. De Marchi (edd.), *Per amore ribelli. Cattolici e Resistenza*, Milano, Vita e Pensiero, 1976; D. Fasciole, *Ribelli per amore. Clero e cattolici nella Resistenza*, Torino-Leumann, LDC, 1980; E. Preziosi (ed.), *Ribelli per amore. I cattolici e la Resistenza*, Soveria Mannelli, Rubbettino, 2007.

<sup>73</sup> As examples, see the *obituaries* published in the column «Maestri di vita oltre la morte» (Teachers of Life after death), «*Scuola Italiana Moderna*», vol. LV, n. 6, 25 December 1945, pp. 60-61; «*Scuola Italiana Moderna*», vol. LV, n. 12, 1 April 1946, p. 359; «*Scuola Italiana Moderna*», vol. LV, n. 16, 1 June 1946, pp. 454-455; and «*Scuola Italiana Moderna*», vol. LVI, n. 12, 10 April 1947, pp. 464-465.

The second attitude, which is worth of being extensively analyzed, is that related to the development of an ideal profile of a primary school teacher totally different from the clichés of the fascist propaganda and, at the same time, sensitive to the new – and in many ways still highly uncertain – perspectives and needs of the emerging democratic society. On this ground, especially immediately after the Second World War, «Scuola Italiana Moderna» was very cautious, given the political and institutional uncertainty of the country and, in particular, the strong ideological contrasts that characterized the political forces engaged in the construction of the democracy in Italy<sup>74</sup>.

The values and principles around which the primary school teacher's role of was defined, after the exaggerations and misrepresentations of fascist propaganda, referred to an austere and essential conception of the Christian faith and, also, to a love for the country free from any nationalist and imperialist characterization. In the *obituaries* published in the magazine of Brescia in the immediate post-war period, the idea of democracy is rarely associated with the role and mission of the primary school teacher, who, on the contrary, is celebrated for the special and unique role of educator of the moral and religious conscience and promoter of a national feeling among the younger generation after «the huge disaster of World War II». An example of this approach is the memory of the Milanese teacher Rosa Errera, a real *icon* of the Lombard Catholic teachers' movement of the first half of the twentieth century. The magazine of Brescia stressed about her:

She was teacher of several generations of teachers in the teachers' school «Gaetana Agnesi» of Milan. [...] Rosa Errera was highly educated and possessed as well, in the highest degree, the art of teaching. But she was not satisfied with the simple transmission of knowledge; she formed the consciences, shaping the souls. She was affable, always dignified, refined in her manners. Uprightness, loyalty, sense of duty were the most distinctive features of her personality. She had a deep religious sense<sup>75</sup>.

The majority of the *obituaries* published on «Scuola Italiana Moderna» at this time were based on the union *Faith and Fatherland* and the ideal of the teacher as a «trainer of consciences» and «shaper of souls». So, Alessandro Brolis, a teacher from Bergamo who «for 42 years» had generously given to «the school the treasures of his intelligence», was celebrated for the fact that, against the «lies» of the totalitarianism and the falsity of the ideals that dominated the Fascist period, he «was engaged in the battle for the growth in honesty, in the integrity of character, in the awareness of duty of the young pupils who were entrusted to him»<sup>76</sup>.

<sup>74</sup> See P. Scoppola, *La proposta politica di De Gasperi*, Bologna, Il Mulino, 1977; A. Gambino, *Storia del dopoguerra. Dalla Liberazione al potere DC*, 2 voll., Roma-Bari, Laterza, 1978, 2 voll.

<sup>75</sup> Errera Rosa, «Scuola Italiana Moderna», vol. LV, n. 12, 1 April 1946, p. 357.

<sup>76</sup> Brolis Alessandro, «Scuola Italiana Moderna», vol. LV, n. 13, 15 April 1946, p. 372.

And while the primary teacher of Cuneo Giacomo Olivero, who died prematurely when he was only twenty-nine, was celebrated as a «beautiful figure of educator, partisan and a believer»<sup>77</sup>; a special memory was dedicated to the teacher Maria Rosa Volipi from Dorno (Pavia), who had «devoted herself to school, educating to the feelings of goodness, love toward God, the homeland and the work»<sup>78</sup>; to the teacher Nicola Fiorenza from Acerenza (Potenza), «who educated several generations to the worship of God, the homeland and the family»<sup>79</sup>; to the teacher of Terni Rita Bartolucci, called *Mamma Rita* by «several generations of girls she educated at school to the ideals of the Faith and the Fatherland»<sup>80</sup>; and, finally, the elementary teacher of Vicenza Antonietta Galli, who dedicated «25 years of her life to the education of youth, giving all of herself for the moral and intellectual development of childhood with the supreme aspiration to bring them to the high ideals of God and the Fatherland»<sup>81</sup>.

In the late forties, in conjunction with the beginning of the process of democratic renewal in the Italian schools promoted by the Minister of Education Guido Gonella<sup>82</sup>, the *obituaries* published on «Scuola Italiana Moderna» presented the profile of a primary school teacher capable to combine the «sacrosanct battles in defense of the Catholic school» and for the widespread of the «Christian ideals in the public schools», with a direct and constant commitment in favour of the «renewal of the teaching methods» and in support of the reform and strengthening of primary and popular education.

In this regard, on the one hand, we assist to the celebration of the work of those who, like the teacher of Turin Felice Mattana, was «one of the most tireless defenders of the free school, of the Christian school», being committed «in the protection of the dignity of the teachers' category, and, and above all, in the defense of the Christian thought and practice in the school»<sup>83</sup>; or of the «venerable teacher Angelo Colombo» from Pagnona (Valsassina), who «fought strenuously», during her whole life, for «the holy battle for the development of the Christian ideals in schools»<sup>84</sup>. On the other hand, there

<sup>77</sup> *Olivero Giacomo*, «Scuola Italiana Moderna», vol. LVI, n. 2, 16 October 1946, p. 95.

<sup>78</sup> *Volpi Maria Rosa*, «Scuola Italiana Moderna», vol. LVIII, n. 13, 15 April 1948, p. 442.

<sup>79</sup> *Forenza Nicola*, «Scuola Italiana Moderna», vol. LVIII, n. 13, 15 April 1948, p. 442

<sup>80</sup> *Bartolucci Rita*, «Scuola Italiana Moderna», vol. LVIII, n. 14, 30 April 1948, p. 476.

<sup>81</sup> *Galli Antonietta*, «Scuola Italiana Moderna», vol. LVIII, n. 14, 30 April 1949, p. 274. See also *Franceschi Donati Geltrude*, «Scuola Italiana Moderna», vol. LVIII, n. 8, 30 January 1949, p. 151; *Fontana Ottavia*, «Scuola Italiana Moderna», vol. LVIII, n. 20, 1 September 1949, p. 406; and *Garoffolo Isabella*, «Scuola Italiana Moderna», vol. LXII, n. 16, 31 May 1953, p. 51.

<sup>82</sup> See G. Chiosso, *I cattolici e la scuola dalla Costituente al centro-sinistra*, Brescia, La Scuola, 1988; and R. Sani, *Le associazioni degli insegnanti cattolici nel secondo dopoguerra 1944-1958*, Brescia, La Scuola, 1990.

<sup>83</sup> *Mattana Felice*, «Scuola Italiana Moderna», vol. LX, n. 16, 20 June 1951, p. 23.

<sup>84</sup> *Colombo Angelo*, «Scuola Italiana Moderna», vol. LXVII, n. 15, 1 April 1958, p. 50. See also *Peloso don Luigi*, «Scuola Italiana Moderna», vol. LVIII, n. 18, 15 July 1949, p. 360; *Cremona Carlo*, «Scuola Italiana Moderna», vol. LXVII, n. 21, 1 June 1958, p. 66; *Bottini*

was the attempt to focus the readers' attention on the ideal of a primary school teacher with a strong confessional identity and, at the same time, sensitive to the educational and teaching renewal and committed to the improvement of the teachers' category and the democratic reform of the Italian school, through the participation in school magazines and/or in militating in the professional trade unions and associations.

In this sense, some *obituaries* published in the magazine of Brescia during the year 1949 are exemplary. The first, dedicated to the Milanese priest and teacher Giovanni Terruzzi, stated that the school, with his death, had lost

a passionate, smart, experienced teacher. In meetings and conferences where the school problems, programs, methods, teachers' knowledge, renewals, school reforms were discussed, his word was always well received and his judgment – the result of deep studies and of a long, intelligent experience – was always accepted. The magazines often published his writings on school themes<sup>85</sup>.

The *obituaries* dedicated to the teachers Edgardo Beranek, Giuseppina Caranti and Giuseppe Maria Grossi were similar. In the first, the teacher from Trieste, then become school inspector of «a circle of the Agro Romano», was celebrated for his being «sensitive to all the school and teaching problems, publishing some valuable didactic notes, the result of a living experience; there was no educational aspect that he wasn't capable to illustrate with skill and clarity»<sup>86</sup>. In the second, the one dedicated to the teacher of the small village of Valmadonna (Alessandria), Giuseppina Caranti, she was celebrated as an «ardent supporter of Montessori's theories and of the *new pedagogy*»<sup>87</sup> and for her long battle for the renewal of the teaching and didactic methods.

Finally, Grossi's obituary is far more articulate and full of ideas. His remarkable career was considered as an example and the result of a «self-sacrifice» and «an intelligent commitment» to support the «cause of the teachers» and the fight for the development of the «Christian principles» in the school:

*Giuseppe Maria Grossi*, chief inspector of the primary schools in Rome, was born in Pico (Frosinone) in 1881 and died on the 27<sup>th</sup> March [...] He was teacher in the primary schools of Rome, then headmaster in 1912 and deputy school inspector. In 1915 he won, one of the first, the competitive exam to become for Scholastic Inspector. [...] He organized the schools in Ciociaria for many years, until the beginning of the recent war. But in 1938 he had to leave Frosinone because of the opposition of the leaders of the youth organizations of the time, which criticized his purely educational activity. [...] After having given proof

*Noberini Maria*, «Scuola Italiana Moderna», vol. LXVII, n. 23, 10 July 1958, p. 50; *De Peverelli Enrico*, «Scuola Italiana Moderna», vol. LXIX, n. 22, 1 July 1960, p. 59; and *Del Rossi Pasquale*, «Scuola Italiana Moderna», vol. LXX, n. 4, 20 October 1960, p. 46.

<sup>85</sup> *Terruzzi mons. Giovanni*, «Scuola Italiana Moderna», vol. LVIII, n. 18, 15 July 1949, p. 360.

<sup>86</sup> *Beranek Edgardo*, «Scuola Italiana Moderna», vol. LVIII, n. 18, 15 July 1949, p. 360.

<sup>87</sup> *Caranti Giuseppina vedova Moretti*, «Scuola Italiana Moderna», vol. LXIII, n. 3, 1 November 1953, p. 68.



of patriotism and self-sacrifice, he became chief of the elementary schools of Rome, and for some years he dedicated all his tireless activities to their reorganization and normalization. But he was also engaged in the field of the teachers' organization, where he brought his rich and deep experience and versatility. He was elected national vice president of the Italian Association of Catholic Teachers, and then presented as a candidate to the Superior Council of the P.I. and elected by unanimous vote by the Teachers, directors and inspectors of Italy. [...] He was a committed and sincere Christian; simple and frugal in tastes; lover of the good and beautiful things; scrupulously honest; friend of the teachers and their defender, sacrificing himself; human and sympathetic to the needs of the others, unaware of his own ones; courageous and gentle at the same time, never excessive in his judgments and actions, but always measured and prudent; cultured and modest, a humble scholar in teaching something to the others. He gathered all the virtues and all the lights of goodness and love in his noble soul<sup>88</sup>.

In this framework, a special mention goes to the obituary of the teacher and collaborator of «Scuola Italiana Moderna» Maria Magnocavallo, protagonist for many years of the battles of the «Nicolò Tommaseo» Union and appreciated responsible for the «didactic section»<sup>89</sup> of the magazine of Brescia, disappeared in October 1956. She was emphatically called the *Mother and Teacher of the Italian teachers* and her biographical profile is a remarkable synthesis of the main teaching qualities we referred above, thus being the indisputable model of the *Christian teacher* for the new generations of teachers who worked at school in the new and complex season of the republican democracy in Italy:

She lived in difficult and troubled times, feeling the duty to respond to the urgent need to defend the widespread of the values in society and to fight for the Christian school, revealing courage and perseverance, along with a superior intelligence. He fought with her words and writings. [...] She entered very young in the Milanese schools, as a teacher, first, and then, from 1910 to 1928, as Headmaster, and was an intelligent mentor and an experienced teacher for the teachers she directed. She always performed her duty, she multiplied her activities in the school and in the field of goodness as well. Her deeply Christian conscience made her aware of many needs and duties, so that she dedicated all her varied and constant activities to their fulfillment. [...] She began teaching in a period when the secularism prevailed and she was soon aware of the need to defend Christian education. Maria Magnocavallo was the promoter of the Association Nicolò Tommaseo, established to defend the rights of the Christian school. They were difficult years, years of battles; but she was always present. In each conference, her eloquent and persuasive voice resounded; she was in the frontline in every battle [...] In the end, when the storm finished, Maria Magnocavallo became part of the Association of Catholic Teachers[...] She studied, with her intelligence and competence, the 1923 programs, within the so-called great Reformation of the school, to which she gave also her help and advice. Something similar happened for the 1945 programs, even if she only dealt with educational problems<sup>90</sup>.

<sup>88</sup> Grossi Giuseppe Maria, «Scuola Italiana Moderna», vol. LIX, n. 1, 10 October 1949, p. 11.

<sup>89</sup> On the figure and work of the teacher and journalist of Brescia, Maria Magnocavallo, see the interesting essay of C. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento: il contributo di Maria Magnocavallo (1869-1956)*, Brescia, La Scuola, 2005.

<sup>90</sup> O. Bonafin, *Maria Magnocavallo Mamma e Maestra dei maestri italiani*, «Scuola Italiana

In the fifties, finally, there was the publication on «Scuola Italiana Moderna» of a number of very interesting *obituaries*, in which for the first time there was a model of teacher that would have become prevalent on the magazine of Brescia, during the following decade. We refer to the idea of an elementary teacher considered as an agent of «the civil and political promotion of the people», or better to say, as the «creator of the social emancipation» and of the necessary «democratic maturity» of the lower classes<sup>91</sup>.

According to «Scuola Italiana Moderna», the school teacher was an expression of the people themselves, from which he came and to which he dedicated his work as an educator, thus becoming their *personal intellectual* and the natural creator of their cultural and civil improvement. So, in the attempt to clarify and legitimate this profile, the teacher's *proletarian origin* was emphatically emphasized, along with his profound and vital bond with the world of work and his unique ability to understand the needs and the authentic aspirations of the lower classes. «The teacher is able to feel the people's needs, – an editorial published in April 1948 stated – being commonly proletarian in his origins and living among the people who work and suffer [...] He considers the people's participation in culture the most human and urgent need, his main task»<sup>92</sup>.

The emphasis with which, in December 1951, «Scuola Italiana Moderna» celebrated Felice Socciarelli is not surprising, considering what we stated above. He had been teacher in the schools for the peasants in Agro Romano for many years, and he was a real protagonist in the fight against illiteracy and for the emancipation of the roman lower classes<sup>93</sup>. His biography and work fully reflected the new ideal of the teacher author of the «civil and political growth of the people»<sup>94</sup>.

The *obituary* printed in April 1959 for the teacher and school inspector Tacito Ruggerini, instead, was different. In fact, it contained significant references to the lively discussion developed throughout the course of the fifties about the organization of the new school for 11-14 years old students and created for the completion of the compulsory education under the Art. 34 of the Italian Constitution<sup>95</sup>.

It should be remembered that «Scuola Italiana Moderna» strongly objected to the hypothesis, supported by the secondary teachers' associations and by a significant part of the Italian pedagogy, also of Catholic orientation, of a three

Moderna», vol. LXVI, n. 3, 16 October 1956, pp. 7-8.

<sup>91</sup> M. Agosti, *La scuola e il nuovo profilo sociale del maestro*, Brescia, La Scuola, 1953, pp. 56-61. The book contained a series of speeches by Marco Agosti already published on «Scuola Italiana Moderna», in the previous years.

<sup>92</sup> Editoriale, *La politica dei maestri*, «Scuola Italiana Moderna», vol. LVIII, n. 14, 30 April 1948, p. 445.

<sup>93</sup> See F. Socciarelli, *Scuola e vita a Mezzaselva*, Brescia, La Scuola, 1951.

<sup>94</sup> G. Ugolini, *Felice Socciarelli*, «Scuola Italiana Moderna», vol. LXI, n. 5, 15 December 1951, p. 3.

<sup>95</sup> See L. Ambrosoli, *La scuola alla Costituente*, Brescia, Paideia, 1987.

years period to complete the compulsory education and organized as an unitary middle school with three different addresses. The magazine, like many other teachers' associations of different ideological and political orientation, at the beginning was in favour of a course for 11-14 years old students and organized exclusively as a post-elementary three-year school established wherever there was an elementary school and entrusted to the teachers. Then, it opted for a compromise solution, i.e. a post-elementary school for 11-14 years old students and entrusted to the teachers, but organized as an autonomous course of study independent and parallel to the unitary middle school and for the pupils who did not intend to pursue further studies<sup>96</sup>.

In this regard, Marco Agosti, in an important article published in the magazine of Brescia, established a real bond between the function of the post-elementary school entrusted to the teachers and the specific needs of the new democratic society established after the fall of fascism and the end of World War II. «The popular school – said the author, referring to the three-year course for 11-14 years old students – should be free and compulsory for all the youths who finished the elementary school and did not want to continue their studies. [...] Its particular task is the formation of the civic consciousness as a premise for the future active participation of the young people in politics»: a formation process that Agosti considered not only useful but «necessary» and, in some respects, a prerequisite for the democratic development of the country, because, as he pointed out «if it is true that the democracy is the government of the people for the people», the «condition of its own existence» lays in the ability to provide the people with the tools for a full and conscious participation in community decisions and choices. «Without civic consciousness – the author concluded – there is no democracy»<sup>97</sup>.

Among the main merits of Tacito Ruggerini, teacher and school inspector of Mantua who died in the spring of 1959, there were the deep awareness of the unique role of the primary teachers in the «civil and political development of the people» and the «democratic growth of the country», and the particular commitment in favour of the establishment of the post-elementary course for 11-14 years old students entrusted to the teachers:

The school inspector Tacito Ruggerini died suddenly in Mantua on the 14<sup>th</sup> of March when he was 73. He was one of the most significant figures of the primary school of Mantua in the last period. [...] He affirmed that they could create all the middle schools that wanted, but they should not forget that for the vast majority of the children the only possible, and really useful, post-elementary school had to be part of the elementary organization and entrusted to well selected teachers. But the brave inspector did not remain in the field of a

<sup>96</sup> See Sani, *Le associazioni degli insegnanti cattolici nel secondo dopoguerra 1944-1958*, cit., pp. 144-167; and Sani, «*Scuola Italiana Moderna*» e il problema dell'educazione popolare negli anni del secondo dopoguerra (1945-1962), cit., pp. 265-319.

<sup>97</sup> M. Agosti, *Scuola di popolo*, «*Scuola Italiana Moderna*», vol. LVI, n. 2, 16 October 1946, pp. 49-50.

sterile controversy and passed to the practical implementation. [...] He was able to create a lot of post-elementary schools, full of his firm faith. The experiment gave good results so that the province of Mantua was among the most advanced provinces in the field of post-elementary education<sup>98</sup>.

### Conclusions

At the conclusion of the analysis of the *obituaries* published on the main and most popular didactic and teachers' magazines in the first century of united Italy, we consider appropriate to focus on some results of our research and, in particular, on the role of a source such as the *obituaries* in the definition of the teachers' identity and in the establishment and widespread of a certain ideal figure of schoolteacher.

Undoubtedly, it was a significant role, whose analysis should take into account a real paradox characterizing the school and teachers' story in the post- unification period. A paradox deriving from the fact that, in the history of our country, although the substantially unaltered condition of social marginalization experienced by the teachers' category<sup>99</sup>, there was a constant exaltation of the rhetorical figure of the primary school teacher, considered a «mentor and educator of the nation», the author of the «refinement» and «civilization of the common people» (especially from the rural areas) and a supporter of their «moral and spiritual development», the protagonist of the «emancipation of the Fatherland» and the creation of the fascist «new man»; and finally, with specific reference to the second post-war period, the creator of the civic and democratic consciousness of the peoples.

In this sense, as we underlined in our study, the austere and ever-present columns of *obituaries* published on the Italian didactic and teachers' magazines had a function that went far beyond the simple promotion and revival of the memory and example of the «disappeared colleagues» among the teachers' category. In fact, they contributed – much more than the other columns and articles- to establish the main characteristics and features of the *teachers' identity*, thus showing the evolution of the model of primary teacher in the different historical phases and in the light of the different ideological, political

<sup>98</sup> *Ruggerini Tacito*, «Scuola Italiana Moderna», vol. LXVIII, n. 16, 1 April 1959, p. 75.

<sup>99</sup> See G. Vigo, *Il maestro elementare italiano nell'Ottocento. Condizioni economiche e status sociale*, «Nuova Rivista Storica», vol., nn. I-II, 1977, pp. 43-84; E. De Fort, *I maestri elementari italiani dai primi del Novecento alla caduta del fascismo*, «Nuova Rivista Storica», vol. LXVIII, nn. V-VI, 1984, pp. 527-576; C. Ghizzoni, *Il maestro nella scuola elementare italiana dall'Unità alla Grande Guerra*, in Sani, Tedde (edd.), *Maestri e istruzione popolare in Italia tra Otto e Novecento*, cit., pp. 19-79. But, with particular reference to the female teachers' condition, see A. Ascenzi, *Drammi privati e pubbliche virtù. La maestra italiana dell'Ottocento tra narrazione letteraria e cronaca giornalistica*, Macerata, eum, 2012.

and cultural contexts; and the various meanings given to the elementary and popular school as a tool for the construction of a national identity and for the promotion of the values of citizenship in the different period of the united Italy.

In this regard, the implicit pedagogical value of the *obituaries* is particularly evident: one of their main aim, in fact, was to provide the new generations of teachers with examples of a right professional conduct and with true ideals and models of behaviour, through the presentation of the disappeared teachers' biographies and experiences.

But there's more. The *obituaries* published in the Italian didactic and teachers' magazines at the turn of the twentieth century referred almost constantly to particularly important issues and to the main problems gradually affecting the teachers' category, influencing their actions and choices in the post-unification period. Think, for example, to the battles fought in the different historical periods in favour of the improvement of the legal and economic status of the category, to the efforts – at the beginning almost exclusively local but later, at the beginning of the twentieth century, also national – for an «organization of the teachers' forces» and to develop the professional associations and trade unions within the category; and finally, with particular reference to the twentieth century, to the efforts made to reform the normal and teachers' schools in favour of the renewal of the teachers' pedagogical culture<sup>100</sup>.

In this sense, the *obituaries* published on the Italian didactic and teachers' magazines, far from placing the lives of the disappeared teacher in an abstract context or in a timeless universe lacking of any reference to the context of origin and to the particular experiences the protagonists, tried to 'read' the biography and the experience of the individual teacher within – i.e. as a part of- the most general (and unanimous) teachers' category: they, thus, gave to this biography and experience an undeniable *value of identity*, conferred a new and deeper meaning to the individual teacher's choices and work and consolidated, at the same time, the feeling of belonging to the category.

A last consideration. In analyzing the columns of *obituaries* published in the didactic and teachers' magazines during the Fascism we found that, even from the second half of the thirties, there were no direct or indirect references to Fascism, to its ideals, guidelines and orientations. In fact, two school magazines such as «Scuola Italiana Moderna» and «I Diritti della Scuola», in celebrating the memory of the disappeared teachers, showed a substantial and very surprising non-involvement in the values and slogans of Mussolini's regime, continuing to advocate on their pages an ideal of teacher and elementary school largely autonomous and not coincident with that supported by the Fascist propaganda. So that, the first significant traces of the presence of the Fascist ideology within the *obituaries* were dated back to 1938-1939.

<sup>100</sup> See R. Sani, *School policy and teacher training in Italy in the Giolitti age*, «History of Education & Children's Literature», vol. V, n. 1, 2010, pp. 239-257.

Now, if you consider that the school and teachers' magazines, including the most prestigious and widespread two we referred above, were, already at the end of the twenties, clearly subservient to the logic of Fascism and 'normalized' in their contents, columns and editorial orientation, thus giving a stereotyped information, completely functional to regime's directives, on the school and on the propaganda<sup>101</sup>, you can easily understand how the teachers' *obituaries* – by virtue, probably, of their low cultural profile and political importance – ended up representing a sort of last support of the values and ideals non-involved, or even hostile, to those proposed fascism. They represented a free zone, an area of freedom and resistance to the totalitarian ideology, which permitted to keep alive and spread among the younger generation, through the disappeared teachers' biographies and the references to their works and choices, an idea of the elementary teacher's role and prerogatives different from that imposed by Mussolini's regime and forcedly promoted – in conformity with the government's directives and to avoid censorship – in the other parts of the same magazine (editorials, interventions, recent news etc.).

<sup>101</sup> See Id., *Educational and mass market catholic publishing in Italy between the two wars*, «History of Education & Children's Literature», vol. II, n. 2, 2007, pp. 217-238; Id., *The «Fascist reclamation» of textbooks from the Gentile Reform to the School Charter of Bottai*, «History of Education & Children's Literature», vol. III, n. 2, 2008, pp. 305-335; and Id., *Catholic educational publishing between the two wars: the case of the publishers SEI of Turin and La Scuola of Brescia*, «History of Education & Children's Literature», vol. IV, n. 1, 2009, pp. 231-242.

# The Scientific Method in Giuseppe Sergi's Pedagogy

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**ABSTRACT:** The pedagogical anthropology inspired by Giuseppe Sergi is briefly sketched and analysed in terms of the scientific method and logic underlying its structure. Such method and logic are compared to the scientific techniques of both natural and social sciences of the contemporary age, as they are subsumed in the thought of the author. Giuseppe Sergi's pedagogical anthropology stands out for its use of logical and introspective thought, evolutionary ideas on the psyche leading to an improvement of man's character and mental higher functions. It hints at a bridge between the world of quantity, where science resides, and the world of quality, where humanity dwells.

**EET/TEE KEYWORDS:** Anthropology; History of Pedagogy; Positivism; Italy; XIX-XX<sup>th</sup> Centuries.

## *Introduction*

As acknowledged by Maria Montessori in the preface of her earlier works<sup>1</sup>, Giuseppe Sergi is the inspirer of pedagogical anthropology. The basic idea of Sergi was to found children's pedagogy onto anthropology, intended as the study of man's origin, development and activities. Sergi's interest in pedagogy stemmed from his attention to various social issues of the time and from his strong belief in Darwinism<sup>2</sup>. From such a perspective education could not be just about instruction, but it had to be another tool to aid the evolution of the race,

<sup>1</sup> M. Montessori, *Pedagogical Anthropology*, New York, Frederick A. Stokes, 1913; Ead., *The Montessori Method*, New York, Frederick A. Stokes, 1912.

<sup>2</sup> A. Volpone, *Giuseppe Sergi, 'champion' of Darwinism?*, «Journal of Anthropological Science», vol. 89, 2011, pp. 59-69.

a method for improving man's higher psychological functions<sup>3</sup>, *i.e.*, what Sergi called *character*.

From many points of view, Sergi's insistence on the methodology of teaching was forerunning rigorous theories such as those of John Dewey (Pesci has discussed this)<sup>4</sup>; and his method was the method of science. But what science and which method? For Sergi the scientific discourse unfolded from (physiological) matter, see his theory of emotions<sup>5</sup>, and facts (these were assumed, in his vision, to be either self-evident or accessible through observation and rational thought).

With the taxonomical 'lenses' of today, Sergi was undoubtedly a positivist. However from his positivistic base, Sergi was able to develop a bridge toward more impalpable topics such as the education of the character<sup>6</sup>. For him education meant, first and foremost, education in matters of the human spirit. Surprisingly, as discussed in<sup>7</sup>, this led him to be in better agreement with some spiritualist educationalists of his days, such as Casati, than with the secular ones<sup>8</sup>. In his system of thought, this was not perceived as a contradiction: for Sergi the 'spirit' was merely a function of the 'psyche' that, in turn, it was merely a function of human physiology. In such a way, in one sweeping stroke, he had reduced spirit to matter. Nowadays, this is perceived at least as controversial due to the realisation of the problem of emergence<sup>9</sup>: the ability to interpret psyche (once it is given) in terms of physiology does not imply the ability to reconstruct psyche from physiology alone. However, Sergi's tension between the materialistic and the spiritual side of life was somehow balanced in his science and transferred to his idea of pedagogy. Since the search of such a balance is a topic of discussion in current society, it is legitimate and interesting to ask questions regarding how (and if) Sergi achieved it. Moreover, it is also meaningful to inquire about what lessons (if any) one can take that are still actual.

A point that will be discussed is that, in spite of the positivistic origin, and the suggestion of quantitative measurements to obtain knowledge of children<sup>10</sup>, Sergi's pedagogy moves from a form of thinking that could be classified as

<sup>3</sup> G. Sergi, *Per L'educazione del Carattere*, Milano, Fratelli Dumolard Editori, 1893; Id., *Educazione ed Istruzione. Pensieri*, Milano, Trevisini, 1892; F. Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, Roma, Aracne, 2002.

<sup>4</sup> Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>5</sup> G. Sergi, *L'origine dei fenomeni psichici e loro significazione biologica*, Milano, Fratelli Dumolard, 1885; Id., *Principi di Psicologia: Dolore e Piacere; Storia Naturale dei Sentimenti*, Milano, Fratelli Dumolard, 1894; Id., *Psiche*, Torino, Fratelli Bocca, 1930.

<sup>6</sup> Sergi, *Per L'Educazione del Carattere*, cit.; Id., *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>7</sup> Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>8</sup> Sergi, *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>9</sup> P. Clayton, *Mind and Emergence*, Oxford, Oxford University Press, 2004; P.W. Anderson, *More is Different*, «Science», vol. 177, 1972, pp. 393-396.

<sup>10</sup> Sergi, *Per L'Educazione del Carattere*, cit.; Id., *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.



introspective (especially when compared with the thinking used in hard science). Following Heidegger's analysis<sup>11</sup>, today we are aware of the distinctions between calculative thinking and meditative or introspective thinking. A hypertrophy of calculative thinking leads to the dominion of technology<sup>12</sup>, the extreme dangers of nihilism and the twilight of the Western culture<sup>13</sup>. Hence if, as Heidegger suggests<sup>14</sup>, the excess of calculative thinking leads to nihilism, such an excess also stands evidently in antithesis with the possibility of a sound pedagogy. From this perspective, one can realise how Sergi's discourse can naturally develop toward a sound pedagogy: at least introspective thinking does not hinder the development of pedagogical ideas, whereas both the extreme quantification, which one can observe nowadays, and the neglect of *qualia* do<sup>15</sup>. At the foundation of this, there is a yet unresolved difference of paradigm between the sciences of life, based on time-evolving laws, and physics, chemistry and so on, based on eternal laws<sup>16</sup>. If time is the household of Being, as Heidegger taught<sup>17</sup>, then only a Darwinian, evolutionary, meditative thinking, which Sergi mastered, can study man and help him in his own evolution.

The present paper moves from an analysis of Giuseppe Sergi's pedagogy to try to understand how his vision of the scientific method seemingly reconciled the tension between positivistic orientations and pedagogy intended as the education of the character of man<sup>18</sup>. The exposition is structured as follows. The method of natural sciences is discussed in Sec. 2. Social sciences and anthropology, in particular, are discussed in Sec. 3. Section 4 discusses Sergi's pedagogical anthropology while conclusions are given in Sec. 5.

### 1. *The method of natural sciences*

Natural sciences are basically the search for rigorous, methodological knowledge of phenomena. Scientific knowledge can never be considered as definitive but it is always open to refinements, additions, and deep changes both in its foundations and acquired data. Hence, natural sciences do not offer closed system of thoughts but they provide open systems where new axioms and

<sup>11</sup> M. Heidegger, *Discourse on Thinking*, New York, Harpers and Row, 1996.

<sup>12</sup> M. Heidegger, *The Question Concerning Technology*, New York, Garland Publishing, 1977.

<sup>13</sup> U. Galimberti, *Il Tramonto dell'Occidente nella Lettura di Heidegger e Jaspers*, Milano, Feltrinelli, 2005.

<sup>14</sup> Heidegger, *Discourse on Thinking*, cit.; Id., *The Question Concerning Technology*, cit.; Galimberti, *Il Tramonto dell'Occidente nella Lettura di Heidegger e Jaspers*, cit.

<sup>15</sup> R. Guenon, *The Reign of Quantity and the Signs of the Times*, Hillsdale, Sophia Perennis, 2004.

<sup>16</sup> L. Smolin, *Time Reborn*, New York, Houghton Mifflin Harcourt, 2013.

<sup>17</sup> M. Heidegger, *Being and Time*, New York, State University of New York Press, 2010.

<sup>18</sup> Sergi, *Per L'Educazione del Carattere*, cit.; Id., *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

postulates can be added. From such a point of view, if scientific knowledge is considered as a formal logic system, it seems to be free from the contradictions implied by Gödel's theorems<sup>19</sup>.

It is also worth noting that it does not appear easy to determine uniquely and unambiguously the object of investigation of natural sciences. Intuitively, one can classify physics, chemistry and biology as natural sciences, while engineering would be the particular application of the knowledge acquired in those fields to specific problems of interest to man and society. If one considers man as part of nature, then also epistemology and social sciences could be classified as natural sciences. Indeed, epistemology becomes a branch of biology when one considers the embodiment of the human mind<sup>20</sup>. From such a perspective, one might even dare to include the whole of philosophy (considered as the historical unfolding of the human thought) and mathematics<sup>21</sup> into the domain of investigation of natural sciences. In effect, in recent times the neurosciences<sup>22</sup> have started to question such topics. One can also consider the popular references<sup>23</sup>. Hence, the definition of natural phenomena is made blurred by the circularity of man being both the investigating subject of nature and part of the nature he himself investigates. Recently, such a circularity has been re-evaluated as not being a nuisance but as being the very foundations on which knowledge is possible<sup>24</sup>. However, the answer of science to this problem stands in its method, as discussed at length by Heidegger<sup>25</sup> and in the so-called principle of objectification, as discussed by Schrödinger<sup>26</sup>. This principle is based on the reduction of qualities to quantities. Within such a reduction, 'things' are also made abstract. Through abstracting we can reach a stage of agreement. Language itself exemplifies such a process<sup>27</sup>. Such issues will be discussed further in the following.

The adjective 'rigorous' applies to the logical connections that must exist between the different statements of a scientific discourse. Scientific statements

<sup>19</sup> K. Gödel, S. Feferman, *Gödel's Collected Works*, 2 voll., Oxford, Oxford University Press, 1990.

<sup>20</sup> H.R. Maturana, F.J. Varela, *The Tree of Knowledge*, Boston, Shambhala, 1998; F.J. Varela, E. Thompson, E. Rosch, *The Embodied Mind*, Cambridge & Boston, The MIT Press, 1991.

<sup>21</sup> G. Lakoff, R.E. Nunez, *Where Mathematics comes from*, New York, Basic Books, 2001.

<sup>22</sup> E.R. Kandel, J.H. Schwartz, T.M. Jessel, S.A. Siegelbaum, A.J. Hudspeth, *Principles of Neural Sciences*, New York, McGraw Hill, 2013; M.F. Bear, B.W. Connors, M.A. Paradiso, *Neuroscience*, Philadelphia, Lippincott Williams and Wilkins, 2007; R. Joseph, *Neuroscience, Neuropsychology, Neuropsychiatry, Brain and Mind*, Cambridge, Cosmology Science Publishers, 2012; P.L. Nunez, *Electric Field of the Brain*, Oxford, Oxford University Press, 2006.

<sup>23</sup> P.L. Nunez, *Brain, Mind and the Structure of Reality*, Oxford, Oxford University Press, 2010; V.S. Ramachandran, *Phantoms in the Brain*, New York, Harper Collins Publisher, 1998; Id., *The Tell-Tale Brain*, New York, W.W. Norton & Company, 2011; A.R. Damasio, *Descartes' Error*, New York, Avon Books, 1994.

<sup>24</sup> Maturana, Varela, *The Tree of Knowledge*, cit.

<sup>25</sup> Heidegger, *Discourse on Thinking*, cit.; Id., *The Question Concerning Technology*, cit.; Galimberti, *Il Tramonto dell'Occidente nella Lettura di Heidegger e Jaspers*, cit.

<sup>26</sup> E. Schrödinger, *What is Life?*, Cambridge, Cambridge University Press, 2013.

<sup>27</sup> A. Korzybski, *Science and Sanity*, Forth Worth, Institute of General Semantics, 1994.

tend to be organised in logical chains, without jumps of meaning or the introduction of arbitrariness from one statement to the other. The scientific discourse also tends to be organised in a linear way, avoiding circularities by means of objectification<sup>28</sup>. Its structure is mainly deductive<sup>29</sup> and it is developed from few postulates, which in turn are subsumed by *a priori* assumptions alone or observation of natural phenomena in light of *a priori* assumptions. The comparison of the results of the scientific discourse with experiments and observations is used as a criterion to 'falsify' the postulates or the logic of the discourse so that a revision of both can be performed. In other words, the structure of science is intrinsically conjectural<sup>30</sup>: the observation of a manifold of facts usually leads scientists to the formulation of unifying hypothesis. Such a process is loosely referred to as induction. However in the author's opinion, the procedure of formulating hypothesis from phenomena is not really carried out as a quantitative plausible reasoning<sup>31</sup>, despite many claims about this. When has one really compared the quantitative probability of one theory with the quantitative probability of another theory in the history of science? What happens is that hypothesis and theories lead to predictions that are compared to observations and experiments. When such a comparison is satisfactory (according to some criteria), one theory is retained and the other is discarded.

It is important to note that not all rigorous discourses are scientific ones. This will be clarified in the discussion of the meaning of the other adjective in the definition, *i.e.*, 'methodological'. The adoption of rigorous logic by science is, to a certain extent, a matter of belief: there is no way to justify logic if not by the results that we obtain by its use. But where does logic come from? Probably, it is a product of biological evolution and of the advantages that it grants onto its users with respect to the handling of issues that are local in space and time. One should not forget about the idea of the so-called Wittgenstein's ruler<sup>32</sup>, which states that if, when measuring a table with a ruler, one is not certain about the ruler, it might as well be said that the ruler is being measured by the table. Logic is our 'ruler' in science and one must always be aware that it can be perfected. There can also be different logical systems, *e.g.*, Aristotelian vs. non-Aristotelian<sup>33</sup>. For example, quantum mechanics has led to the employment of modes of thinking in which the principle of the excluded third no longer seems

<sup>28</sup> Schrödinger, *What is Life?*, cit.

<sup>29</sup> J.S. Mill, *Collected Works of John Stuart Mill System of Logic, Ratiocinative and Inductive*, Indianapolis, Liberty Fund, 2006; K.R. Popper, *The Logic of the Scientific Discovery*, New York, Routledge Classics, 2002.

<sup>30</sup> Popper, *The Logic of the Scientific Discovery*, cit.; H. Poincaré, *Science and Hypothesis*, New York, The Walter Scott Publishing Co., 1905.

<sup>31</sup> E.T. Jaynes, *Probability Theory The Logic of Science*, Cambridge, Cambridge University Press, 2003.

<sup>32</sup> N.N. Taleb, *Foiled by Randomness*, New York, Penguin Books, 2007.

<sup>33</sup> Korzybski, *Science and Sanity*, cit.

to be valid<sup>34</sup>. With respect to this, quantum mechanics has made us closer to the logic of Lao-Tsu or Heraclitus, see Capra<sup>35</sup> for a popular exposition. Hence, the definition of rigorous in the scientific discourse is subtle and it depends on the object of investigation. However, this can be seen as a confirmation of science being an open system: the logic may vary and indeed it can ‘evolve’ with time and adapt to the object, but it must be present.

It is perhaps unquestioned that the greatest rigour in natural science is achieved by means of mathematics. For such a reason, mathematics stands also at the root of the so-called ‘hard-sciences’, such as physics, chemistry, bio-molecular chemistry, engineering and so on. Roughly, speaking such sciences deals with ‘hard’ facts of nature, ‘objective’ phenomena. It should be remembered that facts are (in part) objectified (made abstract) through a process performed by the human observer: to a certain extent, one should consider a recursive relation between theories, hypotheses and facts<sup>36</sup>, with one defining the other and vice versa. Unless one wants to believe in something similar to Plato’s Hyper-uranium, also mathematics must be considered a product of the human mind and, as such, it has biological bases: it might be seen as the expression of human thoughts by means of a very schematic and abstract language<sup>37</sup>. In the present work, mathematics is considered as a very precise and schematic logical language, which applicable only to highly idealised situations (very abstract models): Mathematics is the main language of hard sciences. However, one should never forget that, as discussed in depth by Smolin<sup>38</sup>, mathematics (in the way it is known today) has fictitious characteristics, probably arising from the procedure of objectification of the world, as discussed in the following. In fact, mathematics removes time (one of the most fundamental and direct *qualia* perceived by man) from the picture of nature and gives atemporal laws, not subject to any evolution, such the theorem of Pythagoras or the identity’s law,  $A=A$ .

Perhaps the basic question when trying to characterise natural science is: What does ‘methodological’ mean? Here, one can follow Heidegger<sup>39</sup> by saying that the essence of science is its method. By this, one is not referring to some specific experimental procedures or to some particular logical rule of inference for discovering new laws. Such an aspect (which might even be deemed trivial) has been criticised (and rightly so) by *anarchist* as Feyerabend<sup>40</sup>. The essence (*i.e.*, its *technê*) of science is to reduce all qualities to quantities, *i.e.*, to objectify (to make

<sup>34</sup> P.A. Dirac, *The Principles of Quantum Mechanics*, Oxford, Oxford University Press, 1982.

<sup>35</sup> F. Capra, *The Tao of Physics*, Boston, Shambhala, 2010.

<sup>36</sup> Poincaré, *Science and Hypothesis*, cit.; Maturana, Varela, *The Tree of Knowledge*, cit.

<sup>37</sup> Korzybski, *Science and Sanity*, cit.

<sup>38</sup> Lee Smolin, *Time Reborn*, cit.

<sup>39</sup> Heidegger, *Discourse on Thinking*, cit.; Id., *The Question Concerning Technology*, cit.; Galimberti, *Il Tramonto dell’Occidente nella Lettura di Heidegger e Jaspers*, cit.

<sup>40</sup> P. Feyerabend, *Against Method*, New York, Verso, 2010.

abstract) by means of modelling, to use rationality (possibly mathematics) in order to derive from the models (representing only a small part of the enormous qualitative phenomenology of the world) a series of consequences or predictions that can be tested experimentally, either by direct observation or by means of more complicated technological tools. These steps intersect with each other in a non-linear way and are directed toward the extension of the scientifically known by means of a constant revision of the logical assumptions of the theories and the search of objective data in need of explanations. It must be noted that, by definition, science studies only what is reproducible and can be agreed upon: if there were no regularities in the world there would be no science as we know it. However, it is also true that scientists constantly 'extract' regularities from the world by means of objectification. This point was clearly described by Schrödinger in the essay 'Mind and Matter'<sup>41</sup>. Hence, the technê of science is to objectify and predict, by logical or mathematical means, something that can be falsified by means of experimental tests<sup>42</sup>. New hypothesis are formulated either to resolve inconsistencies or to try to extend the known and scientific research moves forward as an open endeavour. It must be clear that the statements of science do not concern the world as it is but its objectification, *i.e.*, its reduction to quantities (or, in other words, the abstract version of the world). From such a point of view, the scientific discourse can only deal rigorously with models of the world. Such models are defined by the very questions that the scientist wants to ask and to answer. While this seems (most of the times) clearly understood in the so-called hard sciences, it is worth clarifying that it applies to other sciences too. For example, one might study in zoology (or ethology) the behaviour of certain animals. Any given real animal will be characterised by an enormous numbers of variables and by qualities, such as its temperament. One could consider the animal colour, little defects on its fur, fluctuations of the body temperature and so on, perhaps, in an infinite way. However, what happens in any scientific investigations is that the animal will be objectified: only few characteristics will be selected (under the theoretical assumptions that the others are not relevant to the behaviour to be scrutinised) and the observations and analyses will be confined to what, in fact, constitutes a reduction, or abstract model, of the real animal. The logical or mathematical discourse on such models obeys also certain requirements or *desiderata* that are also the hallmark of any technique: the number of *ad hoc* hypotheses tends to be minimised as science progresses. This was clearly stated by Mill<sup>43</sup>. Mill also stated the principle of the uniformity of nature (which might be considered to be related to the reproducibility of scientific results) and the idea of striving toward a unification of the principles of science. We know that both Einstein and Dirac were deeply influenced by

<sup>41</sup> Schrödinger, *What is Life?*, cit.

<sup>42</sup> Popper, *The Logic of the Scientific Discovery*, cit.

<sup>43</sup> Mill, *Collected Works of John Stuart Mill System of Logic, Ratiocinative and Inductive*, cit.

Mill, see<sup>44</sup> and references therein. And so was Giuseppe Sergi<sup>45</sup>. In summary, one might summarise the method of science in the following steps: i) objective observation of phenomena; ii) modelling and theorising; iii) measuring and/or calculating. All these three steps are interconnected with each other, forming loops, and the process is not at all linear.

## 2. *Social Sciences and Anthropology*

Natural sciences are social activities (since they are performed by groups of individuals) that span over time, both perfecting their achievements and opening new lines of inquiring. Different generations of scientists are able to communicate to each other through the different ages by means of language. This is the so-called ‘time-binding’ of Alfred Korzybski<sup>46</sup>. As social activities, natural sciences are the object of social or ‘soft’ sciences.

Following Hayek’s analysis<sup>47</sup>, soft sciences (such as sociology, or economics) deals not with the relations of facts with other facts but with the relations of man with things or with men with men. However, one could take a dualistic position. As a matter of fact, one could consider such relations as function of the opinions and beliefs of men or could objectify such relations and decide to observe only the behaviour, as it were for inanimate beings incapable of the freedom of decision. Perhaps, both approaches are too limited on their own. As Maturana and Varela have discussed, man is largely an autonomous being, *i.e.*, while man lives without contradicting the laws of physics, chemistry, biology and so on, he can decide to follow his own inner laws<sup>48</sup>. The inner laws of man stem from autonomy and freedom and they seem to be impervious to the principle of objectification: the moment we try to make an object out of the human mind, the mind disappears and it is nowhere to be found<sup>49</sup>. This seems to be another perspective about Heidegger’s warning on calculative thinking and nihilism<sup>50</sup> and yet another side of the existence of emergent properties<sup>51</sup>.

From the perspective of a hard science practitioner, soft sciences might often seem very approximate and dubious<sup>52</sup>. However, it is the very object

<sup>44</sup> A. Pais, *Subtle Is the Lord: The Science and the Life of Albert Einstein*, Oxford, Oxford University Press, 2005; G. Farmelo, *The Strangest Man*, New York, Basic Books, 2009.

<sup>45</sup> Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>46</sup> A. Korzybski, *Manhood of Humanity*, New York, E. P. Dutton and Company, 1921.

<sup>47</sup> F.A. Hayek, *The Counter-Revolution of Science*, Glencoe, The Free Press, 1952.

<sup>48</sup> Maturana, Varela, *The Tree of Knowledge*, cit.

<sup>49</sup> Schrödinger, *What is Life?*, cit.

<sup>50</sup> Heidegger, *Discourse on Thinking*, cit.; Id., *The Question Concerning Technology*, cit.; Galimberti, *Il Tramonto dell’Occidente nella Lettura di Heidegger e Jaspers*, cit.

<sup>51</sup> Clayton, *Mind and Emergence*, cit.; Anderson, *More is Different*, cit.

<sup>52</sup> A. Sokal, J. Brickmont, *Fashionable Nonsense: Postmodern Intellectuals’ Abuse of Science*,

of their research that makes them so, as Hayek noted<sup>53</sup>. Moreover, they can be conducted in a rigorous and clear way through forms of thinking that are different from mere calculative thinking but that are not less important. Here, one can refer not only to what Heidegger called meditative thinking<sup>54</sup> but also to probability and plausible reasoning<sup>55</sup>. In the epistemic approach<sup>56</sup>, probability is the logic of science<sup>57</sup> and can be used as a foundation for scientific discourses over which only partial agreement is, at best, expected. The very application of the rigorous Bayesian calculus of probability is in fact able to prove that the so-called polarisation of opinions is a result of perfectly rational thinking: when *a priori* beliefs and probability assignment are too different between two men and some of such beliefs are close to zero with respect to certain events, the application of Bayesian inference will inevitably lead to a greater difference in opinions, notwithstanding the 'hard' evidence presented<sup>58</sup>.

The application of probability (or plausible thinking) to social sciences should not be seen as just a way to attach numerical weights to hypothesis and ideas. Were one to take such a narrow perspective on plausible thinking, one would be adopting merely another form of calculative thinking<sup>59</sup>. As lively expressed by Taleb<sup>60</sup>, especially in the soft sciences, the key issue is not how to perform the calculations with probabilities to obtain *a posteriori* probabilities. What is of fundamental importance, in light of the phenomenon of the polarisation of opinions, is where one gets his *a priori* probabilities from (*i.e.*, his beliefs) and what kind of ideas and hypothesis are automatically excluded by certain beliefs. Perhaps, there are no easy solutions in this field. For example, it is known that in physics and statistical mechanics, when treated as an application of statistical inference, it is best to take the maximal non-committal beliefs, entailed by the maximum entropy approach<sup>61</sup>. On the other hand, a human life conducted accordingly to maximal non-committal beliefs might be extremely dull and worthless. Perhaps, in this second instance, an approach in the style of Pascal's wager<sup>62</sup> could be more profitable. In conclusion, a possible method for finding rigour in the soft sciences is not given by abolishing beliefs through objectification as in the hard sciences (which incidentally are also deeply and covertly influenced

New York, Picador, 1990.

<sup>53</sup> Hayek, *The Counter-Revolution of Science*, cit.

<sup>54</sup> Heidegger, *Discourse on Thinking*, cit.

<sup>55</sup> J.M. Keynes, *A Treatise on Probability*, London, MacMillan and Co., 1921; N. Taleb, *Foiled by Randomness*, cit.; Id., *The Black Swan*, New York, Random House, 2010.

<sup>56</sup> Keynes, *A Treatise on Probability*, cit.; Taleb, *Foiled by Randomness*, cit.; Id., *The Black Swan*, cit.

<sup>57</sup> Jaynes, *Probability Theory The Logic of Science*, cit.

<sup>58</sup> *Ibid.*

<sup>59</sup> Heidegger, *Discourse on Thinking*, cit.

<sup>60</sup> Taleb, *Foiled by Randomness*, cit.

<sup>61</sup> Jaynes, *Probability Theory The Logic of Science*, cit.

<sup>62</sup> B. Pascal, *Pensées*, New York, Penguin Classics, 1995.

by beliefs), since this would mean abolishing, in many cases, the object of study of soft sciences itself. A rigorous approach could consist in searching deeply for all beliefs and stating them clearly. Such endeavour is possible only through meditative thinking<sup>63</sup> and introspection. As it will be discussed in the following, Giuseppe Sergi showed such a level of introspection in his works.

When the above is considered, one finds anthropology to be a very peculiar science. It studies the human being, both as he currently is and as he was at his dawn. Since the human being is both the subject and the object of such a research, anthropology shows an essential circularity. Such a circularity has been analysed and gauged in a positive way by Maturana and Varela<sup>64</sup>. The main results of their analysis<sup>65</sup> will be here adopted and no further concern regarding the circularity itself will be considered in the following. What is important to realise is that anthropology can be considered as a bridge between hard and soft sciences. From such a perspective a pedagogical anthropology, intended as a positive scientific foundation for the pedagogy of man, is no mere oxymoron but an interesting possibility for both scientific investigation and human education. Sergi imagined it in this way<sup>66</sup>.

### 3. *The Pedagogy of Giuseppe Sergi*

Giuseppe Sergi had a lifelong interest in pedagogy. He did not really developed a systematic method but he dedicated at least two monographs to this topic and acted as a mentor for Maria Montessori, who, at the beginning of her career, before taking a more globalist stance<sup>67</sup>, put into practice the ideas of her acknowledged master<sup>68</sup>. The development of Sergi's ideas about pedagogy points toward the realisation of a bridge between a positivistic stance, which is more typical of hard sciences, to more impalpable concepts such as the education of the character of man. Even if, for Sergi, man's character was merely the collection of the individual's dispositions as based on the individual's physiology, in retrospect, a certain amount of boldness was implied in going across the different scales (from micro to macro behaviour) while not renouncing to a discussion of ethics. There are problems that are still far from being solved. Moreover, upon reading the text<sup>69</sup>, it seems that at a certain point the nature

<sup>63</sup> Heidegger, *Discourse on Thinking*, cit.

<sup>64</sup> Maturana, Varela, *The Tree of Knowledge*, cit.

<sup>65</sup> *Ibid.*

<sup>66</sup> Sergi, *Per L'Educazione del Carattere*, cit.; Id., *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>67</sup> Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>68</sup> Montessori, *Pedagogical Anthropology*, cit.; Ead., *The Montessori Method*, cit.

<sup>69</sup> Sergi, *Per L'Educazione del Carattere*, cit.



of Sergi's discussion about higher human concepts breaks free from physiology and mere behaviourism<sup>70</sup>. The problems of emergent properties<sup>71</sup> had not been formulated yet in those times and, hence, one cannot expect Sergi either to conduct a thorough analysis of such a crossing or to be aware of it.

Starting from anthropology, in its widest meaning, Giuseppe Sergi arrived at pedagogy through his deep studies in psychology<sup>72</sup>. However, certain characteristic of Sergi's thought (which are of interest to his idea of pedagogy) can also be noticed in his more specialist work in anthropology. In such a field, beside his novel hypothesis concerning the origin and diffusion of European races from Africa<sup>73</sup>, Sergi had distinguished himself for a successful proposal concerning the classification of human skulls based on their morphology<sup>74</sup> and not on mere metric considerations, as encoded in the cephalic index. Here, one can already appreciate a penchant for the crossing from quantitative to qualitative concepts. Such a penchant was to be revealed even more in Sergi's psychological theories. Another important aspect of Sergi's, which deeply influenced his approach to pedagogy, was his strong defence of Darwinism<sup>75</sup> in a period when it was under attack in Italy. Sergi brought evolutionary concepts to the formation of the psyche of the individual<sup>76</sup>. From this, the passage to a pedagogy that acknowledged the development of the children (in ways that had to be further developed by both Montessori and Piaget) was short and almost inevitable.

The conception of the scientific method hold by Giuseppe Sergi was influenced<sup>77</sup> by the work of John Stuart Mill<sup>78</sup> and Alexander Bain. Mill is a very interesting figure since, while on one side he is one of the most cogent figure of empiricism (supporting the belief the human beings should base every concept in verifiable experience), on another side he embraced a very metaphysical position championing the principle of the 'uniformity of Nature'. Perhaps, nowadays, after Popper analysis<sup>79</sup>, one is no longer surprised to acknowledge metaphysical positions in scientific research. This unveils an unavoidable contradiction since assuming that only verifiable assumptions are permitted is indeed no more

<sup>70</sup> W.M. Baum, *Understanding behaviorism: science, behavior, and culture*, New York, HarperCollins College Publishers, 1994.

<sup>71</sup> Clayton, *Mind and Emergence*, cit.; Anderson, *More is Different*, cit.

<sup>72</sup> Sergi, *L'origine dei fenomeni psichici e loro significazione biologica*, cit.; Id., *Principi di Psicologia: Dolore e Piacere; Storia Naturale dei Sentimenti*, cit.; Id., *Psiche*, cit.

<sup>73</sup> G. Sergi, *Africa Antropologia della Stirpe Camitica*, Torino, Fratelli Bocca, 1897.

<sup>74</sup> G. Sergi, *L'uomo secondo le origini, l'antichità, le variazioni e la distribuzione geografica: sistema naturale di classificazione*, Torino, Fratelli Bocca, 1911.

<sup>75</sup> Volpone, *Giuseppe Sergi, 'champion' of Darwinism?*, cit.

<sup>76</sup> Sergi, *L'origine dei fenomeni psichici e loro significazione biologica*, cit.; Id., *Principi di Psicologia: Dolore e Piacere; Storia Naturale dei Sentimenti*, cit.; Id., *Psiche*, cit.

<sup>77</sup> Sergi, *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>78</sup> Mill, *Collected Works of John Stuart Mill System of Logic, Ratiocinative and Inductive*, cit.

<sup>79</sup> Popper, *The Logic of the Scientific Discovery*, cit.; Id., *Quantum Theory and the Schism in Physics*, Totowa, Rowman and Littlefield, 1982.

than a metaphysical belief. The truth is that any theory can start from pure abstract axioms as long as the *predictions* are falsifiable<sup>80</sup>. However, it is known that Mill deeply influenced the young Einstein<sup>81</sup> and Dirac<sup>82</sup>. As Sergi himself wrote<sup>83</sup>, see also the discussion given in<sup>84</sup>, Mill's and Bain's logics were very precious to him during the years in which he taught in high schools. He strongly recommended the study of the method of observation, research, experimentation and of induction of general laws. Immediately, we find in Sergi a strong dislike of metaphysical issues and a zest for the establishment of a teaching methodology based on the (logical) scientific method, as expounded by Mill and Bain. As it has been discussed in Sec. 2, the belief in logic is intrinsically metaphysical in nature. However, the antinomy is readily solved were one to read Sergi's dislike of metaphysical issues as the sound need<sup>85</sup> to connect abstract thoughts to verifiable experience. Sergi's insistence on the need of a scientific education in Italy, both from the point of view of the methodology of teaching and from the point of view of the contents, is notable since, in the author's opinion, it is still of extreme actuality.

While Sergi's scientific activity is always in search for a link between theory and experiments or factual data<sup>86</sup>, in the author's opinion he performs at his best as a theoretician and deep thinker. Both his works on psychology<sup>87</sup> and on education<sup>88</sup> are witnesses to this. His observation skills are truly remarkable while his introspective thinking strives to realise (maybe beyond Sergi's intentions) that bridge between science and humanities, which was to become such a serious concern of Heidegger<sup>89</sup>. Such skills led Sergi to claim the need to found pedagogy on science (psychology) and on a scientific knowledge of the child. Sergi's Darwinism<sup>90</sup>, his theory on emotions<sup>91</sup>, and their confluence in the awareness of the evolution of the psyche of the child<sup>92</sup>, constitute the foundations of Sergi's outlined pedagogical anthropology. Taken together, Sergi's theory

<sup>80</sup> Popper, *The Logic of the Scientific Discovery*, cit.

<sup>81</sup> Pais, *Subtle Is the Lord: The Science and the Life of Albert Einstein*, cit.

<sup>82</sup> Farmelo, *The Strangest Man*, cit.

<sup>83</sup> Sergi, *Educazione ed Istruzione. Pensieri*, cit.

<sup>84</sup> Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>85</sup> Korzybski, *Science and Sanity*, cit.

<sup>86</sup> Sergi, *L'origine dei fenomeni psichici e loro significazione biologica*, cit.; Id., *Principi di Psicologie: Dolore e Piacere; Storia Naturale dei Sentimenti*, cit.; Id., *Africa Antropologia della Stirpe Camitica*, cit.; Id., *Psiche*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>87</sup> Sergi, *L'origine dei fenomeni psichici e loro significazione biologica*, cit.; Id., *Principi di Psicologie: Dolore e Piacere; Storia Naturale dei Sentimenti*, cit.; Id., *Psiche*, cit.

<sup>88</sup> Sergi, *Per L'Educazione del Carattere*, cit.; Id., *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>89</sup> Heidegger, *Discourse on Thinking*, cit.; Id., *The Question Concerning Technology*, cit.; Galimberti, *Il Tramonto dell'Occidente nella Lettura di Heidegger e Jaspers*, cit.

<sup>90</sup> Volpone, *Giuseppe Sergi, 'champion' of Darwinism?*, cit.

<sup>91</sup> Sergi, *Principi di Psicologie: Dolore e Piacere; Storia Naturale dei Sentimenti*, cit.

<sup>92</sup> Sergi, *Psiche*, cit.

of emotions and the foundation of the evolution of the psyche on physiology, appears almost as precursors of the contemporary theory of knowledge based on the embodiment of the mind<sup>93</sup>.

The need of a scientific knowledge of the child was initially expressed in terms of the so-called biographical charts<sup>94</sup>, of which Montessori's first work is full<sup>95</sup>. Sergi was aware of their limitations but saw them as a first step in order to escape mere empiricism in education<sup>96</sup>. From the point of view of the scientific methodology, here one can notice the procedure of objectification in action and the attempt at using numbers (quantity) for further scientific analyses.

Sergi's sensibility toward the necessity of a thorough knowledge of the child is also revealed by its explicit reference to the efficiency of the sensory organs of children as a prerequisite for learning. Moreover, upon linking the psyche to the physiology<sup>97</sup>, pedagogical anthropology joins abstract thoughts with the concrete facts regarding the children.

Sergi intended the concept of character as denoting the collection of dispositions, sentiments and habits of the single individual<sup>98</sup>. He was convinced that the teaching had to be both instructive and educational. One of the reason behind such a conviction was a non-elementalistic view, using the words of General Semantics<sup>99</sup>, of intelligence and sentiments: for him, the distinction between the two was only a fiction, since both refer to the whole conscious process of the individual. In other words, if it is not scientifically legitimate to distinguish between intelligence, sentiments and volition, pedagogy must by necessity deal with the whole psychological process of the individual. When this is conjugated with a strong Darwinian perspective of life<sup>100</sup>, one obtains Sergi's vision of pedagogy as a tool of evolution for the higher psychological functions of man, achieved through the contact between the individual and the collective values of the entire humanity.

<sup>93</sup> Maturana, Varela, *The Tree of Knowledge*, cit.

<sup>94</sup> Sergi, *Per L'Educazione del Carattere*, cit.

<sup>95</sup> Montessori, *Pedagogical Anthropology*, cit.

<sup>96</sup> Sergi, *Per L'Educazione del Carattere*, cit.; Id., *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>97</sup> Sergi, *L'origine dei fenomeni psichici e loro significazione biologica*, cit.; Id., *Principi di Psicologie: Dolore e Piacere; Storia Naturale dei Sentimenti*, cit.; Id., *Psiche*, cit.

<sup>98</sup> Sergi, *Per L'Educazione del Carattere*, cit.; Id., *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

<sup>99</sup> Korzybski, *Science and Sanity*, cit.

<sup>100</sup> A. Volpone, *Giuseppe Sergi, 'champion' of Darwinism?*, «Journal of Anthropological Science», vol. 89, 2011, pp. 59-69.

## Conclusion

Besides social and political considerations, we are currently in an age when, equipped by the fundamental theories of quantum mechanics<sup>101</sup>, together with its application to quantum information<sup>102</sup> and the new discoveries of neuroscience<sup>103</sup>, we are applying positivistic approaches to the study of the human mind and consciousness. We are studying the correlates of the brain excitations and learning many interesting things on the brain but, for what concerns the study of the mind, the summary is that so far we do not have a clue about where to find it<sup>104</sup>. It is the author's opinion that we have forgotten the lessons of the great of the past and their warnings about the essence of the very science that we use to explore the world of phenomena. Not just philosophers as Heidegger<sup>105</sup> have warned us but great physicist as well<sup>106</sup>. Schrödinger had clearly stated, as other before him, that quantitative science is constructed explicitly by reducing all qualities to quantities: the mind withdraws from the world and becomes the canvas in which phenomena appear as in a drawing. From such a point of view, it is not strange that we cannot find the mind in our brain. Though interesting, attempts to locate the mind in the interaction with the environment and other brains<sup>107</sup> do not seem fully convincing to the present author. The work 'Out of Our Heads'<sup>108</sup>, in the words of his own author, merely hints at a different research programs than that currently pursued in neuroscience, with its insistence on the brain, but does not really offer, at the moment, any clear scientific answer. The opinion of the present author is that such a research program, in its present form, is also doomed to fail in its search for the mind. The reason is that networks of brains (or environments) would be analysed by the current scientific method through calculative thinking and their reduction to quantities: in such a way the mind, *i.e.*, the realm of *qualia*, is inevitably pushed in the background.

Starting from a positivistic stance, and equipped with introspective thinking, logic, and a strong connection to phenomenology, long time ago, Giuseppe Sergi sketched a path to a pedagogical anthropology<sup>109</sup> that was sensible toward the child and assumed an evolutionary idea of the psyche. His idea was to consider

<sup>101</sup> Dirac, *The Principles of Quantum Mechanics*, cit.

<sup>102</sup> G. Jagger, *Quantum Information*, Berlin, Springer, 2007.

<sup>103</sup> Kandel, Schwartz, Jessel, Siegelbaum, Hudspeth, *Principles of Neural Sciences*, cit.; Bear, Connors, Paradiso, *Neuroscience*, cit.; Joseph, *Neuroscience, Neuropsychology, Neuropsychiatry, Brain and Mind*, cit.

<sup>104</sup> A. Noë, *Out of Our Heads*, New York, Hill and Wang, 2009.

<sup>105</sup> Galimberti, *Il Tramonto dell'Occidente nella Lettura di Heidegger e Jaspers*, cit.

<sup>106</sup> Schrödinger, *What is Life?*, cit.

<sup>107</sup> Noë, *Out of Our Heads*, cit.

<sup>108</sup> *Ibid.*

<sup>109</sup> Sergi, *Per L'Educazione del Carattere*, cit.; Id., *Educazione ed Istruzione. Pensieri*, cit.; Pesci, *Antropologia e Pedagogia a Roma. Da Giuseppe Sergi a Maria Montessori*, cit.

education as a means to evolve man's higher functions and disposition, which he called character. Logic and the method of the science of his time, as mainly coded by Mill<sup>110</sup> were subsumed in such an approach. In the actual age, when data is produced at incredible speed and when technology is continuously superseded by new technology, man's character tried in an unprecedented way in history. Perhaps, the program implied by Sergi's pedagogical anthropology might be resurrected and brought to completion in light of the new developments in the history of human thought.

<sup>110</sup> Mill, *Collected Works of John Stuart Mill System of Logic, Ratiocinative and Inductive*, cit.



# We Shall See Him as He Is: Image of God in Soviet Children's Literature of the 1960s

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**ABSTRACT:** The 1960s were marked by a renewed wave of attacks against the Russian Orthodox Church. Atheist education through literature became the cornerstone of the campaign. Children's books were expected to emphasize the predominance of the communist ideology over Christianity. Atheism as a new religion had its own scriptures and a pantheon of saints, whose martyrdom heralded by mass literature was to inspire younger generations of readers to follow suit. These books comprised both ideological pamphlets, often written by former priests, illustrated in this article by the analysis of Alexey Chertkov's brochure, and works of fiction by well-known children's writers such as Lyubov Voronkova, Vladimir Tendryakov, Irina Pechernikova. At first sight, their novels fully correspond to the task set before the writers, i.e. making children believe that «there is no God». However, the analysis of anti-religious discourse contained in certain books reveals an internal discrepancy between the explicit propaganda of atheist dogmas and the implicit message of real human values. This ambivalent discourse is created by the writers, whether intentionally or not, by a true-to-life and talented portrayal of characters such as Lyubov Voronkova's dilogy about the Streshnevs. The purpose of the article is to study the image of God and Christianity in the children's books by the aforementioned authors dating back to this period.

**EET/TEE KEYWORDS:** Children's Literature; Russian Orthodox Church; Education; Soviet Union; XX<sup>th</sup> Century.

Dear friends, now [...] what we will be has not yet been made known. But we know that when Christ appears, we shall be like Him, for we shall see Him as He is.

*John 3:2-3*<sup>1</sup>

### 1. *Orthodoxy versus Atheism: Clash of Religions*

In 1918, the Russian Orthodox Church, which enjoyed the status of an official institution in tsarist Russia, was officially separated from the state and the education and deprived of any rights of a legal entity. An anti-religious campaign was launched in the 1920s. It comprised confiscation of church property, including explosion of buildings, and the opening of shrines with the saints' relics. But the most sinister years for the Church as well as for the country as a whole were 1937-1938, the era of the «great terror», which saw the mass executions of clergy and believers.

During the second world war and its aftermath the wave of anti-religious repressions waned only to be resumed in 1959 under the rule of Khrushchev. The «militant atheism» of the 1920s-1930s was replaced by the «scientific atheism». The latter emphasized the educational component of anti-religious propaganda, where literature played a crucial role. Particular attention was paid to children's literature proclaimed as a matter of utmost importance in the formation of a new type of Soviet person by Maxim Gorky<sup>2</sup>.

Once the Orthodox Church was banned from the life of Soviet people, its space was filled with a new kind of religion. «Communism [...] wants to be a religion itself, to take the place of Christianity. It professes to answer the religious questions of the human soul and to give a meaning to life», wrote N. Berdyaev<sup>3</sup>. Quotations from the Bible and the Gospel were borrowed by communist ideologists. That is the case, for instance, of the famous Lenin's sayings «The one who is unwilling to work shall not eat»<sup>4</sup> derived from the Second Epistle of Paul the Apostle to the Thessalonians and «Whoever is not with me is against me» appropriated from Jesus<sup>5</sup>. Logically, the new religion urgently needed to educate its own preachers and to create an efficient means

<sup>1</sup> *John 3:2-3*.

<sup>2</sup> M. Gor'kij, *O detskoj literature: stat'i i vyskazyvanija* [On Children's Literature], Moskva, Gosudarstvennoe Izdatel'stvo detskoj literatury, 1952.

<sup>3</sup> N. Berdyaev, *The origin of Russian communism*, Ann Arbor, University of Michigan Press, 1960, p. 158.

<sup>4</sup> *Thessalonians 3:10*, <<https://www.biblegateway.com/passage/?search=2+Thessalonians+3:10>> (last accessed: February 4<sup>th</sup>, 2015).

<sup>5</sup> *Matthew 12:30*, <<https://www.biblegateway.com/passage/?search=Matthew+12%3A30&version=KJV>> (last accessed: February 4<sup>th</sup>, 2015)).



of conveying the new teaching and glorifying the new heroes. Literature turned out to be one of the most suitable platforms serving this purpose.

The choice of literary forms was simple and wise at the same time. For centuries, the most popular reading amongst Russian people was constituted by hagiographies of saints and patericons. Therefore, the form was already there. The only requirement was to put new wine into old barrels. So, when young Soviet readers driven by genetic memory reached out for a Menaion, they were readily offered descriptions of Lenin's childhood, or adapted biographies of revolutionary heroes. Tales about miracles performed by saints were replaced by sagas of ruses to which revolutionaries resorted in order to cheat the gendarmes. For instance, the famous story about bread inkpots used by Lenin in prison to write letters with milk under the nose of a jail warden<sup>6</sup> (which was read by all elementary school students in Soviet times) portrays the leader of the socialist revolution as a typical trickster thus combining the elements of a folk tale and a saint's life.

A separate gallery of young martyrs was created for different ages. Books containing striking descriptions of virtuous lives and, more importantly, martyrdom and the death of young heroes during the second world war were created for children of all ages: younger readers were offered a collection of brochures under the common title of *The Pioneer Heroes*<sup>7</sup>, while elder students read *The Young Guard* by Alexander Fadeyev<sup>8</sup>.

The pioneer organization uniting children from 9 to 14 was in fact an efficient mechanism of socialization and catechization. An aspiring member was expected to learn the «commandments» of a young pioneer and anthem of the organization, to know the history of the revolutionary movement as well as to demonstrate by his or her behaviour and academic results that he or she deserved to be decorated with the material «symbol of faith» – a red tie – during an initiation ceremony. Atheism was a *sine qua non* of the pioneer movement. Even when the schools were forbidden to teach the Christian doctrine (although not required to teach atheism, which was given a low priority in school curricula) the pioneers were at the forefront of anti-religious propaganda<sup>9</sup>. A pioneer leader's handbook dating back to the 1970s provides for different algorithms of atheist propaganda, specific to the children's age under the common slogan «Pioneers against Religion». For younger children it involved understanding the anti-scientific nature of religion through literature

<sup>6</sup> M.M. Zoshhenko, *Rasskazy o Lenine* [Tales about Lenin], Moskva, Detskaja literatura, 1983.

<sup>7</sup> *Seriya «Pionery-geroi» 1980-1982* [The Pioneer Heroes], Moskva, Malysh, s.d.

<sup>8</sup> A.A. Fadeev, *Molodaja gvardija* [The Young Guard], Moskva, Hudozhestvennaja literatura, 1969.

<sup>9</sup> See S. Fitzpatrick, *Education and Social Mobility in the Soviet Union. 1921-1934*, Cambridge, Cambridge University Press, 1979, pp. 18, 22-23; L.E. Holmes, *Fear no evil: schools and religion in Soviet Russia, 1917-1941*, in *Religious policy in the Soviet Union*, Cambridge, Cambridge University Press, 2005, pp. 125-157.

and cinema, holding anti-religious talks and arranging an «atheist's corner» at school. Elder students were encouraged to forge atheist consciousness and a militant anti-religious stance, which was to «inspire» both their schoolmates and family members<sup>10</sup>. Thus, a pioneer was supposed «to combat the 'prejudices of religion' in the family by emphasizing revolutionary holidays in opposition to the religious feast days»<sup>11</sup>. Cyril, the Patriarch of Moscow and all Russia, recalls in a recent interview that he was ready to become a pioneer subject to being allowed to wear a red scarf to church every Sunday. Although school authorities were reluctant to spoil the statistics (which were expected to show that 100% of students were members of the pioneer organization), the future Patriarch was not allowed to join the ranks<sup>12</sup>.

Given all of the above, one could come to the conclusion that there was no place for the «outdated religion» and the «old God» in Soviet children's literature, especially during the years of a particularly hostile attitude, such as the 1960s. However, this turns out to not be completely true, and our objective is to illustrate it by analyzing an anti-religious pamphlet and novels for children created during this period.

## 2. *Before the rooster crows...*

Ironically, former seminary students and priests were often at the forefront of anti-religious attacks. For example, they became authors of a series of books called *Conversations with Believers*<sup>13</sup>, where each publication was dedicated to a particular Christian holiday and aimed at explaining it from a scientific point of view, revealing logical discrepancies contained in the Gospel and thus showing its fake nature. We would like to dwell on one of such brochures called *Why Is It Scary?* written specially for children by Alexey Chertkov<sup>14</sup>.

Throughout the book, the narrative is maintained in the form of an informal dialogue with an unknown young reader, to whom the author addresses questions, which he immediately answers himself. To create an atmosphere of trust, the author starts with his background. Coming from a clergy family, he became an altar server at a very early age, graduated cum laude from Moscow Theological Seminary and Academy and worked as a priest for five years.

<sup>10</sup> *Pionerskaja rabota v shkole* [Pioneer Education at School], Moskva, Prosveshhenie, 1972.

<sup>11</sup> S. Harper, *Civic Training in Soviet Russia*, Chicago, University of Chicago, 1929, pp. 71-81.

<sup>12</sup> His Holiness Patriarch Cyril, *Otricaja Bozhiju pravdu, my razrushaem mir. Interv'ju TASS* [By Denying God's Truth, We Destroy the World. Interview to TASS], «Zhurnal Moskovskoj Patriarhii», n. 4, 2015, pp. 34-47.

<sup>13</sup> *Serija «Besedy s verujushhimi» 1961-1978* [Conversations with Believers], Moskva, Izdatel'stvo politicheskoy literatury, 1980.

<sup>14</sup> A.M. Chertkov, *Pochemu jeto strashno* [Why Is It Scary?], Moskva, Detskaja literatura, 1964.

The author does not mention what or who made his life take such a drastic change, but the next thing we know about him is that his purpose is to fight «a dangerous and harmful enemy», i.e. religion, and to help «people in trouble», i.e. believers.

Credit should be made to this atheist proselytizer for not having forgotten anything he was taught at the seminary. «The book in front of me is called *Saints' Lives*»<sup>15</sup>, confesses the author. He arbitrarily selects quotes from it and deprives them of context in order to make them ridiculous and senseless – a traditional method used for the creation of such kind of anti-religious pamphlets:

Believers are always instructed to follow the saints' example. However, these saints often acted as certain wildest fanatics do today. The bible says that once god told Abraham, who was «notorious for his piety», to take a knife and kill («to sacrifice», in the biblical language) his son Isaac. The «holy man» loved his son very much, but did not dare disobey, and is venerated by devotees for this<sup>16</sup>.

Having a strong background in theology, the author could not fail to know the difference between the Old and New Testament, which is not at all evoked in his lopsided retelling of the binding of Isaac. Nor does the author mention that Isaac survived and Abraham was praised by God for his obedience.

What strikes most in this book is that God and saints, whose existence he is expected to contest, are very alive and present in the author's consciousness and, as a consequence, in the book. «Cunning god has a lot of loopholes»<sup>17</sup>, warns the author, and «the enemy's nets» are cast by his «attorneys» – the clergymen, who are smart, well-educated, drive fancy cars and therefore should be counted as a real threat to young minds. «All the saints have one thing in common – they did most absurd and useless «feats» instead of stirring their little finger to help people around them»<sup>18</sup>, continues the author and names his foes – St. Alexius Man of God, Lucian the Martyr, Simeon the Stylite, St. Joseph, St. Seraphim of Sarov. There is still a big question mark over how a make-believe being who «did not and cannot exist» is capable of being «cunning» and «finding loopholes».

Another paradox lies in the author's obstinate denial of the human soul. The eloquent preacher makes the following kind suggestion to his adolescent readers:

Try putting away the book for a while now, and imagine that in an hour or two you will no longer be alive. You're reading and thinking now, and suddenly you no more exist. The only thing that remains is a cold corpse, which will also disappear some time later. You will turn into nothing<sup>19</sup>.

<sup>15</sup> *Ibid.*

<sup>16</sup> *Ibid.*

<sup>17</sup> *Ibid.*

<sup>18</sup> *Ibid.*

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

This picturesque illustration precedes an explanation of the «evident fact» that «a strong person» is well aware that «there is no life after death», while «fainthearted fellows» grasp at «the fairytale of an immortal soul» as at a straw. It is remarkable that at the beginning Chertkov laments that the words of his grandfather about becoming an altar server «sunk deeply into his soul». Later on, the author apparently forgets about his theory again, or becomes himself faint at heart as he keeps alerting the reader «not to put his soul into praying» and warns that «religion does not only fill the soul with fear. It kills all kinds of curiosity»<sup>20</sup>.

Chertkov, a prolific writer of atheist books and an anti-religious propagandist, disappeared from the literary scene at the end of the 1980s. In an interview published on a popular Orthodox website [www.pravoslavie.ru](http://www.pravoslavie.ru)<sup>21</sup> in 2013, Mother Magdalena, who is a nun at an Orthodox monastery in Burgundy today, recalls that she confronted Chertkov at an anti-religious meeting in 1962, where she accused him of intentionally contorting quotes from the Gospel and the saints' lives, and publicly called him 'Judas'. According to her, in the 1990s, Chertkov deeply repented his apostasy and tried to earn back his consecration as a priest but failed and worked as a psalm-reader in a church in Riga until he died.

### 3. *Linguo-stylistic Dominants of Anti-religious Discourse in Soviet Children's Literature*

The anti-religious campaign renewed by Khrushchev dictated a new literary canon for bringing up a new generation of atheists. The main technique was to show that scientific progress was incompatible with obscurant religious beliefs. It was instrumental to portray believers as uneducated hypocrites whose example was not to be followed under any circumstances by a vigilant young reader. Therefore, everything having to do with religion should bear sneaky nature:

When nobody looked at her, she crossed the children...<sup>22</sup>

Everyone lives as he pleases, everyone saves his soul as he can. Wear 'your cross' secretly and rejoice<sup>23</sup>.

Why should we herald everywhere that we pray to god? Not at all. We're no fools, we know something about life<sup>24</sup>.

<sup>20</sup> *Ibid.*

<sup>21</sup> Magdalena (Nekrasova), *Chudesnaja istorija o predatel'stve i pokajanii* [A Miraculous Story of Betrayal and Penitence] <<http://www.pravoslavie.ru/put/61221.htm>> (last accessed: February 4<sup>th</sup>, 2015).

<sup>22</sup> I.A. Pechernikova, *Podrostki* [Teenagers], Moskva, Molodaja gvardija, 1950.

<sup>23</sup> V.F. Tendrjakov, *Chudotvornaja* [The Miracle Worker], Moskva, Gosudarstvennoe izdatel'stvo hudozhestvennoj literatury, 1961.

<sup>24</sup> L.F. Voronkova, *Starshaja sestra* [The Big Sister], Moskva, Detskaja literatura, 1958.

Take an alleyway and then go through the courtyard. Thus no one will see you, if you're ashamed 'of going to church'<sup>25</sup>.

Is your grandma still angry? – Nay... not any more. She's always silent and furtively praying<sup>26</sup>.

The religion is embodied by the figure of a grandmother *The Big Sister* (1955) by Lyubov Voronkova<sup>27</sup>, *The Miracle Worker* (1958) by Vladimir Tendryakov<sup>28</sup>, or an old woman (*Teenagers* (1960) by Irina Pechernikova<sup>29</sup>). It is remarkable that in quite a few books the latter is insultingly called *starukha* or *babka* ('crone'), which is in flagrant contradiction with the official ideology of the country, where «the old are always honoured»<sup>30</sup>:

The *starukhy* ('crones') kept talking about the icon, the lights in the marsh, the soul of god's man Panteleimon hovering above the whirlpool and saying that every midnight someone «saws the dome» of the abandoned church...<sup>31</sup>

The *babka* ('old crone') straightened her back, pursed her lips, and gripped a small cross in her brown fist<sup>32</sup>.

In all of the books the only term used to describe a place of worship is *tserkov* (literally 'church'), and almost never *khram* (literally 'temple'). Although often interchangeable, these two words have differences in meaning: formally, *khram* is larger than a church and has more than one altar. The majority of cult buildings, which functioned in the USSR, would be more precisely called *khram* as small churches simply could not survive the anti-religious genocide. Moreover, the word *khram* is part of such idiomatic expressions as *khram Bozhiy* ('God's temple') or *khram dushi* (literally 'temple of soul', meaning that a human body is a receptacle of a soul placed there by God). The selection of the lexeme *tserkov* signals the intention of the writers to downplay the role of the Orthodox faith and everything with which it is connected.

The only novel, where the term *khram* is rather frequently used, is Tendryakov's *The Miracle Worker*. Its occurrence in the discourse of believers is not surprising: «*Khram bozhiy* ('god's temple') stands abandoned, no wonder it has become a nest for all kinds of evil spirits<sup>33</sup>». However, used together with the evocation of 'evil spirits', the semantic value of this expression is intentionally

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

<sup>26</sup> V.P. Krapivin, *Oruzhenosec Kashka* [Kashka the Swordbearer], Sverdlovsk, Sred.-Ural'sk. kn. izd., 1966.

<sup>27</sup> Voronkova, *Starshaja sestra*, cit.

<sup>28</sup> Tendryakov, *Chudotvornaja*, cit.

<sup>29</sup> Pechernikova, *Podrostki*, cit.

<sup>30</sup> Soviet patriotic song *Wide Is My Motherland* by I. Dunayevsky and V. Lebedev-Kumach.

<sup>31</sup> Tendryakov, *Chudotvornaja*, cit.

<sup>32</sup> *Ibid.*

<sup>33</sup> Tendryakov, *Chudotvornaja*, cit.

downgraded by implying the speaker's superstitiousness and ignorance. For the same purpose, *khram* also occurs once in the atheist teacher's discourse:

'The priest' is not just god's propagandist, these are not just prayers he uses for the glory of the lord... he would not spare any means for the old crone's convenience to prevent her from running twelve kilometres to attend a vigil but to offer her a *khram* next door, so that she could carry there the kopecks she earned or saved<sup>34</sup>.

This short passage is rife with religious terms and expressions, which are correctly used (God, for the glory of the Lord, the Vigil). This precise usage by the teacher, a seasoned atheist proselytizer and the most respected person in the village, is complemented by the first introduction of the word *khram* in her speech, which is also technically the most appropriate term here. This careful choice of vocabulary serves two objectives: to demonstrate the speaker's superiority for the account of her knowledge as «knowledge itself is power» and to devalue the term *khram* once again as a place, where an old uneducated woman thoughtlessly wastes her meagre savings. This narrative strategy makes the passage a vivid example of Foucault's understanding of discourse as a manifestation of the will to power.

Both words (*tserkov* and *khram*) are found in the dialogue between the priest and the village teacher:

It is now impossible to open the *khram* of St. Nicholas-on-the-Bridge. We'll not be able to get a permission. The situation would be different, if this *khram* was, let's say, a warehouse or a grain depot... Why? – said Praskovia Petrovna in a surprised tone. Isn't that vice versa? If a former *tserkov* building is occupied, it seems more complicated to vacate it<sup>35</sup>.

Here, the use of the lexeme *khram* subverts itself once again: the cunning priest is eager to resort to a ruse by profanating the sacred place in order to achieve his goals, while the teacher is straight-forward and honest, and, therefore, it is her discourse (including the choice of the word *tserkov*) that is to be trusted.

Finally, in absolutely every book the terms *God* and *the Blessed Virgin* are written in lower-case letters contrary to the tradition of using capital letters not just at the beginning of these words, but also for every derivative and pronoun replacing them. It should be mentioned, however, that this was common for all kinds of Soviet printed media.

Another peculiar and common feature is that boys become more susceptible to the influence of their religious grandmothers. In Voronkova's *The Big Sister*, it is the protagonist's younger brother who takes a vivid interest in the icon of the Virgin Mary brought by the grandmother from the village. While his elder sister is seized with a mixture of embarrassment and disdain, and the small girl

<sup>34</sup> *Ibid.*

<sup>35</sup> *Ibid.*

is simply scared by a «white-eyed creature in a golden crown», the boy is eager to know more and asks if it is really «god's Mum»: «Anton, a gentle and timid boy, became more and more influenced by «Grandma». He got used to crossing himself before meals»<sup>36</sup>.

It should be noted that the cliché of «white eye-balls» also frequently occurs in Tendryakov's *The Miracle Worker*, where it is present virtually in every description of the icon depicting St. Nicholas, whose eyes bear the epithets of «gloomy», «bulging», and «angry»<sup>37</sup>.

In Pechernikova's *Teenagers*, which bears a subtitle «a pedagogical novel», thus indicating that it is expected to contain case studies on children's psychology, a six-year old toddler raised by his grandmother expresses a desire to sing at church services. This boldness results in his immediate removal from the familiar environment, and his atheist parents and teachers act to «overturn all his thoughts»:

We sent Vanya to my mother-in-law's for the summer. She got attached to him – Vanyushka was pretty and caring – and didn't want to let him go back... Various *starukhy* gathered round my mother-in-law. Two *babki* used to live at the monastery, holier-than-thou. They started staffing his head with all kinds of parables, superstitions and nonsense about paradise. When it was time for him to go to school..., he snapped: 'I don't want to go to school! I'll sing at the kliros. I have an angelic voice'<sup>38</sup>.

In this passage we note again the disdainful use of *starukhy/babki* ('old crones') discussed earlier. The selection of adjectives («gentle», «timid», «pretty», «caring») demonstrates that benign boys of a tender age (pre-school or elementary school) become the easiest «victims» of religious grandmothers. Another dominant lexeme occurring in the passage is «holier-than-thou» (the contemptuous *svyatoshka* in Russian), which is applied both to believers as seen above and to the new converts as in the following example: «Either the school will make the boy deny god, or the family will turn him into a holier-than-thou»<sup>39</sup>.

Anti-religious discourse is built on binary oppositions, such as «school/ pioneer organization versus family/religion». This is the case of the young church singer, who refuses to go to school, and Tendryakov's Rodion, who has to make a choice between school and family:

<sup>36</sup> Voronkova, *Starshaja sestra*, cit.

<sup>37</sup> Tendryakov, *Chudotvornaja*, cit.

<sup>38</sup> Pechernikova, *Podrostki*, cit., pp. 185-186.

<sup>39</sup> Tendryakov, *Chudotvornaja*, cit.

School teaches one thing, and the family – quite the opposite... There is no compromise in today's world, although while they keep disputing the dominance over the boy, these two millstones can grind the child's life, mutilate it forever. Let the parents believe how they want and in what they want, but keep the boy's future safe<sup>40</sup>.

Voronkova's novel features an almost blueprint passage:

'Zina' could tolerate that Grandma prayed and went to church... Let her pray, this is her business. She was raised this way. But... she saw how difficult it was for Anton. On the one side, there is Grandma strictly looking at him: «There you are again, sitting at table without crossing your forehead!». On the other, there is Zina with her mocking smile: «Look at this future pioneer! Just remember: when the time comes for you to join the ranks of the organization, I'll denounce you. Pioneers do not need god's devotees!» [...] And Anton hid somewhere in a quiet corner and cried in silence. Zina was so sorry for him that it tore her heart. But what could she do?<sup>41</sup>

These two passages convey two primordial messages of the Soviet atheist propaganda of the 1960s: the blatant incompatibility between a child's socialization and religious practices and the so-called «tolerance» towards the believers. At the same time, the discourse reveals an internal contradiction: the proclaimed tolerance does not suffice to allow the child to make his own choice.

However, these ideas are presented in a different way. The impassible clichés used by the teacher from *The Miracle Worker* merely acknowledge the fact that the child's life is just collateral damage in an uncompromising fight for the bright future built on the principles of the communist religion. As for Voronkova's novel, the description of the dilemma facing the boy cannot leave young readers insensitive to his grief. Here, in fact, there are two victims of the situation: the girl, who unconditionally loves her brother, would have willingly stopped tormenting him, but she has no choice left by the dominant discourse she unconsciously resists («what could she do?»).

The common features of the novels are, in particular, explained by the fact that literary works were ordered by the state with precise «technical specifications» as for the subject, idea and characters. This is why they have similar storylines and sets of characters. However, as demonstrated above, they could be depicted in quite different ways. This statement can be underpinned by further comparison between Voronkova's *The Big Sister* and Tendryakov's *The Miracle Worker*.

Both novels reveal a conflict caused by a confrontation between religion and modernity (i.e. atheism). In Tendryakov's *The Miracle Worker*, the protagonist is an adolescent who finds an ancient icon and becomes venerated by the locals as the «chosen by God». A chain of events provokes a psychotic disorder with the boy, who attempts to commit suicide. The novel was highly praised by

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

<sup>41</sup> Voronkova, *Starshaja sestra*, cit.



critics, read at schools and adapted for the screen. Since Stalin's times, writers were instructed to portray a teacher as an impeccable and virtuous character. The classical example is the teacher from *The Miracle Worker*<sup>42</sup>, who acts strictly in line with the ideological canons. Her rigorous stance triggers a family tragedy, but averts the adolescent protagonist from religion although he nearly dies. Even the teacher's name (Praskovia), which used to rank among the most widespread for the rural population and at the same time alludes to the name of a popular Russian saint (Paraskeva), underlines her closeness to ordinary people. Tendryakov's teacher is never wrong, always knows what to do and is the only one capable to argue with the parish priest. We might well suggest that this unambiguous portrayal of the enlightened cultural hero (the teacher) and the obscurant cruel enemy (the fanatic believer) ensured the success of the novel among Soviet literary critics. On the contrary, the school principal from Voronkova's novel totally loses control over the situation when the pioneer leader, overwhelmed by her ambitions, decides to expel the protagonist from the pioneer organization for violating the atheist dogma.

In spite of certain merits of Tendryakov's book such as, for instance, onomastic strategy based on religious and popular beliefs, the characters are portrayed in a rather flat and lopsided manner. The grandmother is presented as a religious lunatic, who hits the boy to put a pectoral cross on his chest, insults and calls him names, prevents him from going to school, and finally violently beats him for chopping the icon. The narrative dedicated to the old woman, who is supposed to represent the most typical believer, is full of violence and rudeness:

the old crone made him go to the next room and, while rummaging in a box through medicine flasks and spools, hissed angrily:

– You threw away the cross, didn't you? And you, miscreant soul, thought that I would never find out about it? Thank god, who saved you. I'll not chew you out today. People are gathering, and I don't want to be ashamed in front of them. Here's another cross. Put it on now, and stop being difficult.

The old woman's rough fingers unbuttoned his shirt, and she made him bow with a firm palm of her hand. The lace of the cross got stuck by the boy's ear, and the old crone fixed it rudely<sup>43</sup>.

The old woman, a veteran believer and church-goer, is presented to the reader in the most revolting way: her speech is full of vulgar words, she is powerful and makes the boy bow to put on a cross, a sign of resignation towards her and, *par extension*, God's will. Even her hands are rough and unpleasant to touch. At the same time, she is a hypocrite keeping a cross – the thing, which is supposed to be dear to her – among rubbish and fearing that the neighbours will see her true colours.

<sup>42</sup> Tendryakov, *Chudotvornaja*, cit.

<sup>43</sup> *Ibid.*

The grandmother in Voronkova's novel is perhaps one of the most realistic characters. She tries to teach her grandchildren something about the Orthodox faith, and succeeds to some extent: the younger kids start crossing themselves, praying and become keen listeners of the stories about saints:

'Her younger sister' gaily greeted her:

– Zina, Zina, where have you been for such a long time? Our grandma told us a fairy-tale about how Elijah the prophet rode his horses, and God (*bojen'ka*) took him to heaven together with the horses and the chariot<sup>44</sup>.

This passage bluntly contrasts the previous one both in terms of the ambiance and the choice of vocabulary. The children feel at ease with their grandma, whom they never disdainfully call *babka*. Moreover, the girl uses a diminutive noun *bojen'ka*, when talking about God. This form demonstrating the speaker's affection and widespread among believers was therefore appropriated by Lenin, who stated that «every idea of God, even flirting with the idea of God (*bojen'ka*), is unutterable vileness»<sup>45</sup>.

However, never does the grandmother try to console the children, who lost their mother, by explaining to them the Christian view of the eternal life of the soul, which could have been a far more efficient way of bringing them closer to church. Therefore, she fails to become a «fisher of men»<sup>46</sup> in the proper sense of Jesus' words. This character does not seem to have lost its relevance today as well<sup>47</sup>, which makes it even more true to life. On the contrary, an elderly neighbour who boasts that she burnt her icons in a samovar, suggests using tap water for blessing Easter bread and at the same time condemns those who forget God for being «too smart» is portrayed in a rather grotesque manner, which does not encourage any wish to follow her extravagant example.

This original and multifaceted portrayal of characters involved in a dispute on matters of faith guided our choice of *The Big Sister* by Lyubov Voronkova as an object of a detailed analysis with the view of seeing the perception of Christianity in the novels written for Soviet children.

#### 4. The Big Sister by Lyubov Voronkova. Introduction to Case Study

Lyubov Voronkova, a renowned Soviet author of books for children, was born in 1906. She was not just a talented writer, but also a professional painter

<sup>44</sup> Voronkova, *Starshaja sestra*, cit.

<sup>45</sup> P. Froese, *The plot to kill God: findings from the Soviet experiment in secularization*, Berkeley and Los Angeles, University of California Press, 2008, p. 44.

<sup>46</sup> *Matthew 4:19*.

<sup>47</sup> Seraphim (Rose), *Opasnosti na puti k zhivoj vere* [Dangers on the Way to Faith] <<http://www.pravmir.ru/opasnosti-na-puti-k-zhivoj-vere/>> (last accessed: February 4<sup>th</sup>, 2015).

and an erudite: her works include historical novels about Alexander the Great, Cyrus and Themistocles, which are being republished today. While working on these books not only did she meticulously study the history of ancient Greece, writings of Herodotus, Plutarch and Aristotle, Indian and Oriental philosophy. She also travelled to the old cities of Samarkand and Bukhara, where the described events took place, visited historical places and worked at local libraries<sup>48</sup>. All this evidences that the writer undertook a diligent research before writing her novels. Voronkova is mostly known for her stories and novels about children and for children. They submerge the reader into a warm world of rural childhood inhabited by characters, who are not at all ideal, but have the most important merit: they are alive. *The Big Sister* (1955) and its sequel *Personal Happiness* (1958) stand out among them for a few reasons: firstly, *The Big Sister* is the only of Voronkova's books touching upon religious issues and, secondly, both books contain a true-to-life description of a Soviet teenager's life, who has to survive and ensure survival of her family. As this does not happen during a war or a revolution, no external enemy can be blamed for the protagonist's «inexhaustible chalice» of sufferings. This realistic account of «a happy Soviet childhood» was probably the reason why this novel, once so popular that an additional number of copies was published in 1956, 1959, 1963, and even a «spin-off» thereof (a shorter version for younger readers promoting atheist values) was published twice (in 1963 and 1978), never saw light again later.

What can be easily noted about the novel is the writer's in-depth knowledge of the Christian rites and holidays. She uses a perfectly correct terminology to describe the sacraments of confession and the Eucharist, or the sequence of Paschal church services. The narrative contains intertextual elements from the New Testament, for example, «look at the birds of the air; they do not sow or reap or store away in barns, and yet [their] heavenly [f]ather feeds them»<sup>49</sup>, and biblical metaphors such as «to leave Chaldea for the land of Canaan». Her attention to details allows us to establish the exact day of the Holy Week on which a particular event takes place. Born before the revolution of 1917, Voronkova received at least four years of religious education, which was mandatory at the time. For reasons which are well-known, her official biography does not mention anything about her theological knowledge. However in view of her diligent approach to the history of ancient Greece and Oriental studies, we might assume that the same applied to the Orthodox religion, although here the objective facing the writer was to unmask and expose this «opium for the people».

<sup>48</sup> V.V. Putilina, *Svetlyj i dobryj talant* [Pure and Kind Talent], in L.F. Voronkova, *Sobranie sochinenij*, 3 voll., Moskva, Detskaja literatura, 1986, Vol. 1, pp. 5-22.

<sup>49</sup> *Matthew* 6:26.

### 5. *Sonia Marmeladova* à la soviétique

The protagonist of *The Big Sister* is a teenage girl Zina, orphan by mother, who takes care of her father and two younger siblings. Zina is an honest, hard-working and responsive girl, an artistic soul, but, most importantly, she is a real young pioneer and, as her father points out, she is brought up in accordance with the communist principles. We can assume that the protagonist in fact has quite a few autobiographical traits: she has as meticulous and artistic a nature as the writer herself. She is also a talented painter. Finally, even the choice of the main character's name (Zina, a diminutive form for Zinaida) does not seem fortuitous. Voronkova has a novel titled *Zeus' Son*, which she had longed to write for a long time. According to the Greek mythology, Zeus had a daughter called Zinaida. So, allegorically, *The Big Sister* might as well be called *Zeus' Daughter*, which precedes the long-awaited novel about Alexander the Great.

The protagonist's childhood is abruptly interrupted by her mother's sudden death. In her new life she will have to make adult choices more than once, and these choices very often contradict the dominant ideology. The first law Zina has to violate is the famous Lenin's slogan «Learn, learn and learn!». When she faces a dilemma between maintaining her brilliant academic results and becoming a mother figure for her younger brother and sister, she selects the latter without any doubt neglecting her schoolwork, from a straight «A» student she turns into one of the worst in the class. When the girl becomes totally extenuated by housekeeping duties, her father finally decides to invite his mother to look after the children, an elderly woman and a church-goer, and here comes the crucial standoff between atheism and the Orthodox faith, which triggers a personal drama.

Zina is in fact a *Sonia Marmeladova à la soviétique*: just as Dostoyevsky's character, she cannot count on her weak father and ensures survival of her younger siblings on her own. She sacrifices her whole life for their sake without any hesitation, and, apart from satisfying all their mundane needs, turns into an inexhaustible source of moral support for them.

Once the grandmother crosses the doorstep, she immediately expresses her grievance that there is not a single icon in her son's home: «Oh, we push god away, and then start whining that our life is difficult!»<sup>50</sup>. The first thing she does is to put an icon of the Virgin Mary into a corner. The youngest child is afraid of it, and Zina tells her to look at their mother's picture:

It took a long time for little Izyumka to get used to the dark face with white eyes, which looked at her from the bedroom corner. [...] Zina put a warm shawl at the bedside to keep the icon out of her sight.

– She doesn't see me either, does she? – asked Izyumka.

– No, she doesn't, - Zina consoled her.

<sup>50</sup> Voronkova, *Starshaja sestra*, cit.

– Is she looking at me?

– Mum is looking at you, not her. Can you see our Mummy?

Izyumka turned to her mother's photo ... if Mum is looking at Izyumka, she can sleep peacefully – Mum will never let anyone hurt her<sup>51</sup>.

This scene provoking strong disapproval from grandmother's side («was your mother holier than the Blessed Virgin?»<sup>52</sup>). Being totally correct from the formal standpoint of view, grandmother seems to be ignoring the fact that the adolescent simply replaces one maternal figure with the other. These mother figures have more in common for the girl than she realizes: both are intangible and therefore eternally unreachable. The pain of her loss is acute, and she is old enough, unlike her brother and sister, to understand that she will never see her mother again. However, despite her perfectly atheist education denying the existence of the soul, she is unwilling to accept the fact that her mother turned into nothing. The Virgin is traditionally considered as the Intercessor for humans before God in Orthodox culture. Being unfamiliar with this fact, the girl still has religious consciousness although is unaware of it. Therefore, she finds consolation in convincing her younger sister (and herself) that their mother's picture protects them against all evil. Thus the images of the mother of God and of her own late mother merge in the adolescent's mind.

Though Zina is reluctant to listen to anything about God or religion, her younger siblings turn out to be more receptive. The boy starts crossing himself and praying in front of the icon, and both children are fascinated by grandmother's stories. The elder sister is not an exception, although instead of the icon, she prays in front of her mother's portrait. Zina, who vehemently strives for showing her denial of the existence of God and everything connected with the Orthodox faith, initiates the following dialogue:

She came up to a small portrait of her mother, which hung on the wall in the bedroom. Mother's eyes were smiling at Zina, they saw and understood everything.

And her mother was standing here again, next to Zina, and tenderly talking to her.

«Don't grieve that much, Zina, – she said. – Those who are alive should live their lives. [...] I know that I, your mother, am always in your heart and in your memory. But do you really think that I would be pleased if you were always sad and never happy? My beloved, I am not with you, but it was always your happiness that made me happy, and your joy that made me joyful. Rejoice, dear daughter, do not blame yourself».

«I will, mother, I will, – responded Zina to her mother. – But I want you to know one thing: I never forget about you, and I never will, I'll never stop loving you, and we'll need you forever»<sup>53</sup>.

This «conversation» reminds very much of a prayer, although apparently the girl is not aware of it. The above dialogue is not in any way possible according

<sup>51</sup> *Ibid.*

<sup>52</sup> *Ibid.*

<sup>53</sup> *Ibid.*

to the atheist canon, first and foremost, because there is no soul and, therefore, there is simply nobody to talk to. So, to be on the safe side, the writer replaces the ambiguous *soul* with *heart* and *memory*, and uses the past tense (it *was* your happiness that *made* me happy), while the semantics of the phrase definitely suggest using the present.

The message addressed by the mother to her daughter is in fact the repetition of Jesus' words said to the widow of Nain («don't cry»<sup>54</sup>) and very closely resembles those of Father Zosima from *The Brothers Karamazov* consoling a crying woman, who lost her child: «...rejoice and weep not...»<sup>55</sup>. The girl's plea certainly has common traits with one of the most well-known Orthodox prayers to the Blessed Virgin *My Most Gracious Queen*:

Mother of God [...] joy of those in sorrow [...] see my distress, see my affliction! For I know no other help but thee, no other intercessor, no gracious consoler but thee, O Mother of God, to guard and protect me throughout the ages...<sup>56</sup>

Taking into account the fact that the grandmother insisted on teaching the children to pray to the Virgin Mary as «the shelter of orphans», we can assume that her reasoning, although frantically denied by Zina, is echoed in this improvised prayer.

The question of faith creates an atmosphere of constant tension between Zina and her grandmother who maintain ardent debates. The girl obstinately tries to interpret literally everything the old woman explains to her about religion. Nevertheless, more than once this young militant atheist feels confused and bewildered by her grandmother's behaviour, which makes her ponder. As a result of her musings, she unconsciously becomes capable of expressing condensed formulae of religious precepts. For example, while thinking about grandmother's explanation about the Lent, the girl exclaims: «Who can ever understand this?» thus demonstrating her understanding of the irrational nature of religion.

After a conversation with her father, during which he, unlike his daughter, cannot conceal his emotions, Zina reprimands herself: «You've upset Dad again! [...] You are unable to endure anything by yourself»<sup>57</sup>. Indeed, «suffering produces endurance, and endurance produces character, and character produces hope, and hope does not put us to shame»<sup>58</sup>.

Another utterance of the same kind belongs to Zina's younger brother Anton, to whom grandmother gives a detailed account of the Holy Communion:

<sup>54</sup> *Luke 7:13*.

<sup>55</sup> F. Dostoevsky, *The Brothers Karamazov*, transl. by C. Garnett, <[http://www.online-literature.com/dostoevsky/brothers\\_karamazov/8/](http://www.online-literature.com/dostoevsky/brothers_karamazov/8/)> (last accessed: February, 4<sup>th</sup>, 2015).

<sup>56</sup> Akathist to the Most Holy Theotokos, <<http://stnektariosroc.org/files/prayers/akathist-to-the-theotokos.pdf>> (last accessed: February, 4<sup>th</sup>, 2015).

<sup>57</sup> Voronkova, *Starshaja sestra*, cit.

<sup>58</sup> *Romans 5:3-5*.

-The priest will pray, and the holy spirit will descend to the chalice. The sacramental bread will turn into Christ's body, and the wine will become his blood.

- Are you going to drink from this chalice, Granny? – asked Anton with fear<sup>59</sup>.

The word *fear* evoked by the kid immediately makes us recall the traditional formula proclaimed during the Divine Liturgy before the Holy Communion: «With fear of God and with faith draw nigh»<sup>60</sup>. The semantics of the utterance contradicts its formal side. Apparently, the boy's naïve materialistic view is not a reverend fear of a believer before the sacrament and is supposed to create a humorous scene, but a more in-depth analysis allows us to look at it from another angle. Thus the author creates an internal discrepancy, which is overtly in tune with the dominant ideology, but covertly conveys quite the opposite.

## 6. *The Passion of a Pioneer*

The culmination of the confrontation between two religions is an episode with a kulich, traditional Easter bread, which is to be blessed by a priest and which Zina's sick grandmother cannot carry to the church herself. Feeling sorry for her grandma and desirous to avoid a discord in the family, Zina surrenders after an intensive spiritual struggle and grants the old woman's plea, being fully aware that she might be embarking on her own Way to Calvary.

Due to the realistic background created by the author, we know that this is happening on Holy Saturday, the day of commemoration of Christ's descent into Hades through the Cross. It should also be noted that Paschal motives are omnipresent in Russian literature. Suffice it to remember Bulgakov's *The Master and Maragarita*, or *The Student* and *The Bishop* by Chekhov, where the plot is built on the chronotope of the Holy Week, when sufferings on the cross are transformed into the joy of eternal life. The first thing Voronkova's character notices, when she approaches the church building, is its brightly shining cross. She sees a couple of birds sitting on it, symbols of life and resurrection, and smiles. And immediately she feels a hunch, which makes her turn back and see her own Judas – one of her classmates, who denounces her at school the next day.

Astonishingly, Zina comes to the conclusion that her denunciator did the right thing and acted as «a real pioneer» («love your enemies and pray for those who persecute you»<sup>61</sup>). Zina is submitted to public judgment and humiliation orchestrated by the pioneer leader, who proposes to expel her from the pioneer organization thus turning her into a pariah.

<sup>59</sup> Voronkova, *Starshaja sestra*, cit.

<sup>60</sup> Divine Liturgy of St. John Chrysostom <<http://www.orthodox.net/services/sluzebnicchryso.stom.html>> (last accessed: February, 4<sup>th</sup>, 2015).

<sup>61</sup> *Matthew 5:43-38*.

Zina stood pale and anxious. She kept looking at her classmates and resembled of a bird recently captured and encaged. Her near and dear friends suddenly seemed strangers to her. [...] She decided that everything was over. [...] Without being able to discern anything around her, she came up to the table, undid her tie without thinking, took it off and put on the table. Looking right in front of her with an empty gaze, she turned away and left the classroom<sup>62</sup>.

This storyline alludes to the biblical parable about the Binding of Isaac<sup>63</sup> with a reversed paradigm of values. Just as Abraham ties his beloved son to the altar to prove his devotion to God, the girl is supposed to choose the communist religion over her family and friends. But she renounces her ideological principles and sacrifices the thing most dear to her heart symbolizing the essence of her existence – her pioneer tie – de facto choosing Christian God. Isaac is replaced by a lamb. Likewise, the public execution is stopped the very moment the girl puts her pioneer tie on the table by the sudden appearance of her former teacher, who manages to take the situation under control.

As a contrast, we should yet again evoke Chertkov's anti-religious brochure mentioned earlier. The author proposes to his young reader the same moral dilemma: what if your grandmother asks you to take a kulich to the church? As usual, he gives his own trenchant answer:

If your convictions are at stake, you have to be firm and strong-willed. What you have to say is: – Dear granny! I'm a pioneer. And a pioneer does not believe in god. I will not violate my oath. I'll do anything you ask, but I won't go to the church, don't take offence!». Of course, only a stouthearted and brave person is able to act like this<sup>64</sup>.

This passage is preceded by the reasoning behind this «stouthearted and brave» attitude towards grandmother: «imagine you're asked to steal something. Are you going to become a thief if you're told so?»<sup>65</sup>. We can only guess what kind of grandmothers the propagandist met in his life that made him draw this comparison.

The episode from Voronkova's novel and the drama vividly portrayed by the author, where the adolescent is guided by her heart and soul, is an illustration of Dostoyevsky's concept of active love and selflessness. The grandmother as a Christian, whose only attributes of a believer are constituted by an icon and a calendar of religious feasts, is opposed to her atheist granddaughter, who, however, behaves in accordance with the best Christian canons and is capable of self-sacrifice for the sake of those whom she cherishes the most. The girl's devotion proved by deeds does not at all correspond to the imperative dictated

<sup>62</sup> Voronkova, *Starshaja sestra*, cit.

<sup>63</sup> *Genesis* 22:2-8.

<sup>64</sup> Chertkov, *Pochemu jeto strashno*, cit.

<sup>65</sup> *Ibid.*



by the official propaganda thus constituting the essence of real faith for «whoever does not love does not know God, because God is love»<sup>66</sup>.

However, another binary opposition is implied in the novel, and, surprisingly, it arises between the protagonist and her father who follows the communist dogmas to the letter. Although formally he is portrayed by the author as an ideal Soviet citizen, the most likely feeling he provokes is bewilderment at his coldblooded attitude towards his own children. At first confusion arises when he calmly and indifferently observes his thirteen-year-old daughter completely take the role of a housewife after his wife's death, although there are neighbours who demonstrate their eagerness to help. He limits his fatherly assistance by saying that the most important thing for the girl is to study, and that the housework will wait. However, these words are not underpinned by any acts from his side. He does not seem to care that his daughter, who is a talented painter, gives up her dream as she simply cannot cope alone with the load of household chores. Only after finally checking her school report one day does he confess that he was «slightly confused» and decides to ask his mother to move to their place from the village. More than once he solemnly declares that «we do not prohibit anyone from praying<sup>67</sup>», but as soon as he finds out about his daughter's visit to the church, his religious tolerance vanishes into thin air and he compares the girl's act to high treason. But the most evident difference between their perceptions of «personal happiness» comes at the end of the namesake novel, where the very first thing that occurs to the father at the thought that his children are growing fast is that «all people in [his] family are affiliated with the communist party<sup>68</sup>» in this or that way, being members of different organizations appropriate to their ages. On the contrary, when the same idea occurs to his daughter, her heart fills with «happiness and pride» as «it was her who helped [the children] grow up, cooked for them, dressed them, put them to bed, lit up their lives, saved them from troubles, she, their elder sister»<sup>69</sup>. And this idea of living for the other constitutes her «personal happiness».

Thus the polyphonic narrative created by the author contains two layers of binary oppositions. The visible one is in complete compliance with the imperative ideological canon and shows an ideal image of a young pioneer, whose life is almost ruined because of a momentary weakness and compromise with religious prejudices. But the hidden contradiction deeply inherent in the plot is that to be such a beautiful person, the protagonist has to trespass the ideological code again and again. While keeping her narrative strictly in line with the communist rhetoric parameters, the writer manages to create a character appealing to the readers and thus covertly undermining the ideological discourse.

<sup>66</sup> *John 4:8*.

<sup>67</sup> Voronkova, *Starshaja sestra*, cit.

<sup>68</sup> L.F. Voronkova, *Lichnoe schast'e* [Personal Happiness], Moskva, Detskaja literatura, 1961.

<sup>69</sup> *Ibid.*

## *Conclusion*

*The Big Sister* is certainly not a dissident novel, but a classical example of the literature of commitment. It comprises all the necessary elements. The official goal is to make it crystal clear that you can do the right thing only within the rigid frame of the communist norms, while sneaking into a shrine with the saint's relics is something worthy of an approving smirk. Just as in Chertkov's pamphlet, or Tendryakov's novel, Voronkova uses hostile metaphors to describe religion and religious artifacts: a kulich and Easter holiday resemble a «bait in a trap», the church is «hiding» among the houses as if it were preparing to ambush a naïve passer-by and its wide open doors do not symbolize a warm welcome – the only thing they hide is «cold shade».

The young reader is definitely expected to condemn the protagonist for her double standards, and observe with reverend fear the fatal consequences of the wrath of the ideological «god» provoked by her apostasy (humiliating judgment of «fair» school comrades and the most terrible thing that might happen to a young builder of communism – expulsion from the pioneer organization). However, readers' reviews show that this was not the case. The majority of internet posts from people, who still remember the novel from their childhood years, is filled with sympathy towards the protagonist, who is by far more appealing to them than both bigot believers or atheists<sup>70</sup>. A masterful command of the narrative technique allows the writer to create a living character and not a fictitious bulk of virtues drained of human nature, typical for children's literature of that time.

Thus the author shows, whether intentionally or not, that the atheist straight jacket turns out to be tight for this young person capable of her own critical judgment. The writer's talented portrayal of life-like characters allows us to see that despite outright propaganda there is always an errant young heart in a tireless search for the real human values. And this heart unknowingly takes the side of Christian God, whose formal existence is sincerely denied. «Blessed are the pure at heart: for they will see God»<sup>71</sup>. And they will see Him as He is.

<sup>70</sup> <<http://www.livelib.ru/book/1000308786>>; <<http://books.imhonet.ru/element/284621/>> (last accessed: February, 4<sup>th</sup>, 2015).

<sup>71</sup> *Matthew* 5:8.

# «Science and didactics» in school textbooks for secondary school during de-Stalinization in the Soviet Union (1954-1962)

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**ABSTRACT:** This article aims to analyze some of the main aspects of the revision process of textbooks undertaken after Stalin's death (1953) and particularly in the period between 1954 and 1962. Revisions carried out during de-Stalinization meant not only changes at the ideological level, that were still very important for the communist education of the new generation, but also a long process of updating scientific knowledge in the various school subjects. After an introduction to the historical context of the Khrushchev period which marked the condemnation of Stalin's cult of personality and the relaunch of the communist project through new social and educational reforms, the two parts of this paper describe the review process with a focus on the debates initiated «from above», within the Ministry of Education, the historians of the Academy of Sciences and the Publishing House for Teaching and Pedagogy (*Uchpedgiz*), and «from below», among teachers in the journal *The teaching of history in school*. The first part, in two sections (a and b), analyzes the start of the review and reprinting process that began in 1954 with particular attention paid to the exact sciences textbooks (a) and those of history (b), both for secondary schools, based mainly on the archival documents from the Ministry of Education. The second part (also in two sections a) and b) highlights the teachers' debates about the renewal of didactical methodology in the postwar secondary school, with a focus on World War II (a) and an in-depth review of the «most stable» textbook in Soviet history, the *History of the Soviet Union* published under Pankratova's direction (b).

**EET/TEE KEYWORDS:** History of Education; Textbooks; History teaching; M.N. Pankratova; N.P. Kuzin; Soviet Union; XX<sup>th</sup> Century.

### *Introduction. Towards the de-Stalinization of textbooks*

In the Soviet Union, under Stalinism, textbooks became a privileged instrument for the ideological control of the new generations. There was a single textbook for all schools in the country and teachers had no choice. Like other totalitarian regimes such as Italy with its State Schoolbook (*Testo unico di Stato*) introduced by the Law of 7<sup>th</sup> January 1929<sup>1</sup>, so too the Soviet Union was characterized by regime text books for schools of all levels which remained almost unchanged from the late thirties to the early fifties (with a first revision of those on history after World War II)<sup>2</sup>.

For this reason in the sources the Soviet state textbooks are also referred to as «stable textbooks» (*stabil'nye uchebniki*), as opposed to «unstable» learning materials used in the revolutionary schools of the twenties<sup>3</sup>. History books, which are a very representative case, were developed on the basis of Politburo directives under Andrej A. Zhdanov's direction and Stalin's control himself<sup>4</sup>, and were characterized by a Marxist-Leninist reading of history that interpreted the great social transformations and the events of history through the class struggle and the conflict between capitalism and socialism<sup>5</sup>.

Stalin's death, in 1953, was an important event and represented a great break in Soviet history. He was one of the most violent dictators of the twentieth century who had ruled with terror and had made repression the main instrument of social control during the Second World War<sup>6</sup>. The task of Khrushchev was to

<sup>1</sup> J. Charnitzky, *Die Schulpolitik des faschistischen Regimes in Italien, 1922-1943*, Tübingen, M. Niemeyer, pp. 249-263; 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 & Pensiero, 2005. For the Nazi case see: S. Lässig, K.H. Pohl, *History Textbooks and Historical Scholarship in Germany*, «History Workshop Journal», n. 67, 2009, pp. 125-139.

<sup>2</sup> L.P. Bushchik, *Ocherk razvitiia shkol'nogo i istoriceskogo obrazovaniia v SSSR*, Moskva, Izdanie APN, 1961; A. Tchernychev, *L'enseignement de l'histoire en Russie. De la Révolution à nos jours*, Paris, L'Harmattan, 2005; M. Ferro, *Comment on raconte l'histoire aux enfants à travers le monde entier. Nouvelle édition revue et augmentée*, Paris, Éditions Payot, 1992 (English transl. *The Use and Abuse of History Or How the past is taught to children*, Revised edition, with a new preface by the author, translated by N. Stone and A. Brown, London and New York, Routledge, 2003).

<sup>3</sup> D. Caroli, *Cittadini e patrioti. Educazione, letteratura per l'infanzia e costruzione dell'identità nazionale nella Russia sovietica*, Macerata, eum, 2011, pp. 24-34.

<sup>4</sup> S. Kudriashov (ed.), *Istoriuu – v shkolu: Sozdanie pervykh sovetskikh uchebnikov*, Moskva, «Vestnik Arkhiva Prezidenta Rossiiskoi Federacii», 2008, pp. 6-13.

<sup>5</sup> D. Caroli, *New sources for the teaching of history and of the Constitution in Soviet Union (1917-1965): textbooks and school exercises books (1945-1965)*, «History of Education and Children's Literature», vol. IV, n. 2, 2009, pp. 251-278; Caroli, *Cittadini e patrioti*, cit., pp. 56-65.

<sup>6</sup> P. Hagenloh, *Stalin's Police: Public Order and Mass Repression in the USSR, 1926-1941*, Washington DC, Johns Hopkins University Press, 2009; D. Shearer, *Policing Stalin's Socialism: Repression and Social Order in the Soviet Union, 1923-1953*, New Haven, Yale University Press, 2009.

come up with major reforms to try to win the masses back over to socialism and revive the communist project<sup>7</sup>, with the final condemnation of the personality cult of Stalin officially declared during the XX<sup>th</sup> Congress of the Communist Party (1956)<sup>8</sup>; nevertheless, as we shall see, the archival documents show that the cult of personality had already been questioned in 1954 precisely with regard to the preparation of school textbooks.

In the educational field, the most important changes of this period concerned the re-introduction of co-education in July of 1954 and the great reform of the polytechnic school in December of 1958 which made school mandatory up to the age of 15 years (for a total of 8 years of compulsory education)<sup>9</sup>. Already the XIX<sup>th</sup> Congress of the Communist Party (October 1952) had tried to revive the myth of the labour school as discussed later in the XX<sup>th</sup> Congress (1956), with a debate about polytechnic education in order to encourage better training of the workforce, in agriculture especially, which culminated in Khrushchev's school reform (December 1958)<sup>10</sup>.

One year after the death of Stalin, during 1954, the Ministry of Education, under the control of the Communist Party, was about to publish regulations to provide for the reprinting, planning and distribution of textbooks in schools. It was not a simple maneuver because coordinating the Ministry of Education, the Academy of Pedagogical Sciences (founded in 1943) and Publishing House for Teaching and Pedagogy (*Uchebno-pedagogicheskoe Izdatel'stvo, Uchpedgiz*) in the distribution of textbooks to schools would require that educational issues finally become a priority, as was not the case for schools during the war and the immediate post war years<sup>11</sup>. Furthermore, the same drafting process which involved the signing of contracts between the Ministry and the authors, the organization of competitions for the best textbook and the choice of reviewers, followed by a planned production and distribution of textbooks in billions of copies had shown a level of disorganization which would not be easily remedied in a short time.

<sup>7</sup> J. Fürst, *Late Stalinist society: history, policies and people*, in Id. (ed.), *Late Stalinist Russia. Society between reconstruction and reinvention*, Oxford, Oxon, Abingdon, 2006, pp. 1-19; S. Fitzpatrick, *Conclusion: Late Stalinism in historical perspective*, *ibid.*, pp. 269-281; P. Jones (ed.), *The Dilemmas of De-Stalinization: Negotiating Cultural and Social Change in the Khrushchev Era*, London, Routledge, 2006.

<sup>8</sup> E.A. Rees, *Leader Cults: Varieties, Preconditions and Functions*, in B. Apor, C.J. Behrends, P. Jones, A.E. Rees (edd.), *The Leader Cult in Communist Dictatorships. Stalin and the Eastern Bloc*, Houndmills, Basingstoke, Hampshire, Macmillan, Palgrave, 2004, pp. 3-26.

<sup>9</sup> E.T. Ewing, *Separating Schools. Gender, Policy, and Practice in Postwar Soviet Education*, DeKalb, Northern Illinois University Press, 2010, pp. 193-222; Tchernychev, *L'enseignement de l'histoire en Russie*, *cit.*, pp. 36-41.

<sup>10</sup> L. Coumel, «*Rapprocher l'école et la vie?*» *Une histoire des réformes de l'enseignement en Russie soviétique (1918-1964)*, Toulouse, Méridiennes/Presses Universitaires de Mirail, 2014, p. 65.

<sup>11</sup> A. Livschiz, *Pre-revolutionary in Form, Soviet in Content? Wartime Educational Reforms and the Postwar Quest for Normality*, «History of Education», vol. XXXV, nn. 4-5, 2006, pp. 541-560 (see p. 553).

The consequences of the bureaucratic mechanism of the planned economy, characterised by vicious circles also in the field of educational measures from the late Twenties/early Thirties onwards, that sometimes indicated a loss of control by the Central Ministries in the management of concrete problems, is well known to historians<sup>12</sup>, and the bureaucratic issues concerning the textbooks' revision process may have been evident even before 1953. During 1954, the state institutions set to work to overhaul textbook production in the different disciplines and their content. On the basis of a comparison of printed sources and of the archival documents, in this essay I hypothesize that among these so-called «stable textbooks» that were subject to revision, those on history, in spite of the interventions at the level of ideological content, were more stable than those of mathematics and physics which were rather more «unstable» for different reasons, in spite of their scientific and universal content. On the contrary, the revision of history textbooks was more complex than that of textbooks on the exact and natural sciences, because the changes implied a rethinking of the categories of interpretation of history: thus the continual revision of the contents of the history textbook directed by A.M. Pankratova, resulted in the 22<sup>nd</sup> edition in 1963<sup>13</sup>.

The revision of a history textbook was of course not a simple matter and an analysis of the changes at the ideological level would require a much deeper investigation than this article is able to address. I will focus therefore in particular on the discussions that led to the revision of history textbooks for secondary schools using a representative case of a history textbook edited under A.M. Pankratova that shows the emergence of a very new trend which consisted in the renewal of the textbooks through the collaboration between historians and teachers in the name of scientific research and teaching. This can be considered a quite original experience in the history of the drafting of textbooks that occurred at the international level only in the context of UNESCO's international review (in which Soviet scholars only probably participated later in the Thaw period)<sup>14</sup>.

This article, then, does not intend to compare different editions of textbooks before and after the review through an analysis of content from the point of view of the texts' hermeneutics, which would certainly be interesting to develop further in case studies<sup>15</sup>. Its aim is to analyze the little known process of the

<sup>12</sup> See, for example, the case of the Commissariat of Education and the social problem of abandoned children: D. Caroli, *L'enfance abandonnée et délinquante dans la Russie soviétique (1917-1937)*, Préf. de Jutta Scherrer, Paris, L'Harmattan, 2004.

<sup>13</sup> Iu.V. Krasnova, *Uchebnik po istorii SSSR dlia VIII-IX klassov srednei shkoly avtorskogo kollektiva pod rukovodstvom A.M. Pankratovoi*, in Iu.S. Kukushkin (ed.), *Istori i vremia. 20-50-e gody XX veka A.M. Pankratova*, Moskva, Izdatel'stvo Rossiiskogo Universiteta Druzhby Narodov/Mosgorarchiv, 2000, pp. 139-149 (see p. 141).

<sup>14</sup> F. Pingel, *UNESCO Guidebook on Textbook Research and Textbook Revision 2<sup>nd</sup> revised and updated edition*, Paris, United Nations Educational, Scientific and Cultural Organisation, 2010, pp. 9-11.

<sup>15</sup> J.P. Gee, *An Introduction to Discourse Analysis. Theory and method*, New York, Routledge, 2011.

revision of textbooks undertaken during de-Stalinization, which began after the death of Stalin (1953), and in particular from 1954 to 1962. It will try to combine a study of the general context with an analysis of the revision of the content of historical sciences which took place in the Soviet Union<sup>16</sup>. With regard to the main approach about textbooks' analysis («ideological research tradition» and «contextual spin»)<sup>17</sup>, here, it deals more with the study of the revision process as part of a new educational policy of the Soviet regime during de-Stalinization with a particular focus on history teaching and textbooks.

The first part, in two sections, A and B, analyzes the launch process of the review in the context of the debate between the representatives of state institutions (Ministry of Education, Academy of Pedagogical Sciences and State Publishing House for Teaching and Pedagogy, *Uchpedgiz*) on different aspects of the revision of the textbooks on the exact and natural sciences (A) and those of history that required a rethinking of the categories of interpretation of Marxism-Leninism (B), on the basis of unpublished documents kept in the archives of the Ministry of Education and of the State Publishing House. This review process was hindered by the disorganization in the planning of the revision and publication of textbooks and in fact highlighted several facets of the functioning of the bureaucratic machine. Thus, those which were considered «stable textbooks» in some way escaped control of the Ministry that was charged with publishing them.

The second part also organized in two sections, A and B, presents two aspects of the revision process of the history textbook initiated in 1954 which led to the publication of its revised version in 1962, which was considered the result of a synthesis between «science and didactics» and of «school and life», accompanied by new teaching methods about the Second World War. The first aspect concerns the debate generated in the specialized educational press of the time about the renewal of teaching methods of history, in particular concerning the Second World War, the most important event that the population had experienced in the past, which had built a new national identity through a strong collective and almost «sacralized» memory. The second aspect deals with the overhaul of the historical sciences which took place after the XX<sup>th</sup> Congress of the Communist Party (1956), and which was merged in a new edition of the textbook published under A.M. Pankratova's direction in 1962.

<sup>16</sup> See also R.D. Markwick, *Rewriting History in Soviet Russia: The Politics of Revisionist Historiography, 1956-1974*, Houndmills, Basingstoke, Palgrave, 2001, pp. 5-37; Markwick, *Thaws and Freezes in Soviet Historiography, 1953-64*, in Jones (ed.), *The Dilemmas of De-Stalinization*, cit., pp. 73-92.

<sup>17</sup> G.M. Ghizoni Teive, *Theoretical and Methodological Paths for the investigation of Textbooks: The contribution of the Centro de Investigación Manes*, «Revista Brasileira de Educação», vol. 20, 2015, n. 63, pp. 828-843.

### 1. *Textbooks between revision and renewal*

Stalin's death marked a new phase in the history of so-called «stable textbooks» that were first printed in the second half of the thirties. After 15 years they had become obsolete, even if history textbooks had already updated a chapter on World War II; this chapter had been written according to the canons of the cult of Stalin's personality and with an iconography showing him worthy of adulation<sup>18</sup>.

The revision process was quite unusual in the sense that it had to deal on the one hand with the disruption of the central planning and revision process and on the other with the mentality of society, which was probably not yet capable of fully understanding the limits of an ideological and political change that had decreed the end of Stalin's repressions (with the closing of the Gulag in 1953)<sup>19</sup>.

From the mid-thirties, in general the drafting of new textbooks, decreed by the Communist Party, and prepared under Zhdanov's direction and Stalin's control, took place on the basis of competitions charged with choosing the best one. Sometimes the writers were professional historians, but there were also very experienced teachers as was the case with A.V. Fokht, for example, but on the whole teachers rarely took part in it. With the death of Stalin, archival documents tell of a new process, unique in the history of the preparation of school textbooks that shows a tendency to conceive of the textbook as not only the result of mediation between historical science and disciplinary knowledge for schools, but also as the result of science and teaching involving the direct participation of teachers.

After Stalin's death, the issue of the textbook reappeared on the Soviet (Council) of Ministers of the Soviet Union's agenda. During 1953 and 1954 several provisions about the publication of textbooks were published: a provision of 19<sup>th</sup> June 1953 No. 780 «On the inadequate implementation by the Ministry of Education of Russia in the new textbook production and improvement of existing ones» and another of the Soviet of Ministers of 12<sup>th</sup> January 1954 No. 42 «On the measures for the supply of school textbooks for the school year 1954/55». According to the former provision, the Minister of Education drew up a five-year plan for the preparation of new textbooks which provided for the release of 91 textbooks of which 50 were to pass through closed competitions, thus extending the circle of authors. In 1954 it was expected that 19 textbooks would be printed (of which 12 were from closed competitions). To this end, the

<sup>18</sup> D. Caroli, *The depiction of political leaders in school history textbooks between the Rise and Fall of the Cult of Personality (1938-1962)*, in J. Zajda, T. Tsyrlina, M. Lovorn (edd.), *Globalisation and Historiography of National Leaders: Symbolic Representations in School Textbooks* (forthcoming).

<sup>19</sup> O. Khlevnjuk, *The History of the Gulag: From Collectivization to the Great Terror*, transl. by V.A. Staklo, Yale, Yale University Press, 2004.



Academy of Pedagogical Sciences was preparing the necessary requirements for the different disciplines<sup>20</sup>.

However, with respect to the first provision, the reasons for the slowness in drafting and printing of the textbooks was not of a budgetary nature, but depended rather on the authors. Indeed, it can be assumed that the authors were still feeling under the total control of the dictator, postponing the drafting and delivery of the manuscripts. In an exchange of letters of 4 February 1954, the Minister of Education I.A. Kairov informed the President of the Soviet of Ministers of Russia about some delayed publications of the plan concerning textbook production. The authors delayed manuscript delivery and for this reason only 192.4 million roubles had been spent (compared with 364 million allocated) in the 1953 plan. The Ministry of Education asked to spend «1,716,000 roubles on 22 textbooks that should be printed in 1954 according to the plan»<sup>21</sup>.

Moreover, in an explanatory note about the plan for 1954/55, the *Uchpedgiz* Manager, A. Sergeenkov, adjusted the items of expenditure since the budget for textbooks had decreased (elementary school textbooks from 1,500 to 1,400 roubles for each sheet, while for secondary schools from 2,000 to 1,700 roubles). Further, the number of reviews envisaged in 1953 had to be increased from 7 to 11 and the fee for the reviewers increased from 20 roubles, first, to 50 roubles then to 70 roubles. In anticipation of the printing of 22 textbooks with 666 pages (compared to 13 in 1953 with 316 pages), Sergeenkov requested an increase in the allocated sums<sup>22</sup>. Furthermore, in a letter sent to the President of the State Planning (*Gosplan*) of the Soviet Union, M.V. Saburov, concerning the arrangements of the law of 12<sup>th</sup> January, 1954 N. 42 «On the measures for the supply of school textbooks for the school year 1954/1955», Kairov asked for the complete supply of paper requested because the Ministry of Wood and Paper production of the Soviet Union supplied only 5200 tonnes to the *Uchpedgiz* instead of 5600 tonnes<sup>23</sup>. This meant that the *Uchpedgiz* received for example 367 tonnes (instead of 1391) of sheet paper (*forzatsnaia bumaga*) and had to try to make up the shortfall of 1024 tonnes by using a different kind of paper which did not add to quality of the textbook. The same situation arose with the shortfall of 400 tonnes (5200 received instead of 5600 planned) of cardboard which led to the publication of textbooks without hard covers<sup>24</sup>.

The archival documents don't reveal whether these sums were really allocated but confirm that the decision of the joint Minister of Education A.G.

<sup>20</sup> *Predsedateliu Sovet Ministrov RSFSR tovarishchu A.M. Puzarovu*, State Archive of the Russian Federation (GARF), Fond 2306 (Ministry of Education), op. 72, delo 3560, ll. 4-6-6.

<sup>21</sup> *Predsedateliu Soveta Ministrov RSFSR tovarishchu A.M. Puzanov (4 fevralia 1954)*, GARF, Fond 2306, op. 72, delo 3560, l. 30.

<sup>22</sup> GARF, Fond 2306, op. 72, delo 3560, ll. 31-32.

<sup>23</sup> *Presedateliu Gosplana SSR tovarishchu Saburovu M.V. (4 apreliia 1954)*, GARF, FOND 2306, op. 72, delo 43, ll. 43.44.

<sup>24</sup> *Ibid.*, l. 44.

Kalashnikov (1893-1962) in 1946 that the textbook distribution to schools should be considered his own personal task, encountered a lack of planning owing to the economic situation (many enterprises went bankrupt in 1954)<sup>25</sup>. The problems with the preparation of the revision of the manuals were discussed during the pan-Russian conference on textbooks, held on 8<sup>th</sup>-10<sup>th</sup> December, 1954, organized by the Ministry of Education of Russia with the participation of the Ministry of Education I.A. Kairov, the deputy minister I.V. Dubrovina, N.A. Barsukov of the State Publishing House for Teaching and Pedagogy (*Uchebno-pedagogicheskoe izdatel'stvo*), the specialist authors of the Academy of Sciences among whom were well-known historians such as A.I. Strazhev, N.P. Kuzin, A.M. Pankratova and also some teachers. This was the first major conference dealing with the problem of school textbooks whose improvement had already been decided during the XIX<sup>th</sup> Congress of the Communist Party (1952)<sup>26</sup>.

While the published version of the conference proceedings concerned the review and printing process, as well as educational matters, archival documents demonstrate a greater attention paid to content. This process reveals the first steps taken in the renewal of the Marxist-Leninist historiography, which erased the cult of the leader's personality upon which the history textbooks were also based and aimed to re-evaluate the role of the people in history.

Minister of Education Kairov recognized the validity of «stable textbooks», but in anticipation of the publication of new ones noted a delay in the development of programs of different disciplines, insufficient analysis of teaching practices, the improvised involvement of authors which caused the presence of errors in the textbooks and the unsatisfactory performance of the selection committees. The Minister recorded that it was essential that there be collaboration between the Ministry, the Academy of Pedagogical Sciences and the Publishing House for Teaching and Pedagogy (*Uchpedgiz*).

In the explanatory memorandum, the Deputy Minister of Education of Russia, V.I. Dubrovina noted not only the fact that the textbooks were not updated with the latest scientific discoveries of the time, but also that they contained unnecessary pages and did not solve the problem of the link between «theory and practice» as they «feebly illustrate the contemporary techniques and do not arm the pupils with competencies and skills» requested by the school. Dubrovina also stated that the Academy of Pedagogical Sciences did not accord enough importance to elaborating a theory of the textbook from the point of view of a polytechnic education. The obsolete nature of the textbooks concerned not only the content but also the language and graphics<sup>27</sup>.

<sup>25</sup> J. Sapir, *Conflits sociaux et fluctuations économiques en URSS: l'exemple de la période 1950-1965*, «Annales», vol. 40, n. 4, 1985, pp. 737-779 (see p. 756).

<sup>26</sup> V.G. Zacharova, V.E. Stepanova, *Vserossiiskoe soveshchanie po uchebnikam*, «Prepodavanie istorii v shkole», n. 3, 1955, pp. 119-126.

<sup>27</sup> *Ibid.*, pp. 119-120.

The competition for the preparation of the textbooks had produced 26 new textbooks. With regard to the textbooks for years 5-7 and 8-10 for the seven-year school and for the secondary school, the textbook for ancient history by A.V. Mishulin was replaced by the one by S.I. Kosminskii, who also wrote those for years 6-7; the one for the 8<sup>th</sup> was under review by E.A. Efimov; the textbook for the 9<sup>th</sup> year was drawn up by a group of authors (I.S. Galkin, M.I. Zubok, F.I. Notovich, V.M. Chvostov, A.Ja. Manusevich) and was under evaluation. The textbook for year 10 was the only one available but it needed to be reviewed in relation to the historical advancement in science<sup>28</sup>.

Among the other participants there were also N.A. Barsukov, *Uchpedgiz*'s editor in chief, who observed that in 1953 according to the competition, two ancient history textbooks by S.I. Kovalev and F.P. Korovkin had been approved and that they had both already been adopted by schools. The textbooks for years 9 and 10 were being prepared. Also some eminent historians were present at the conference such as A.I. Strazhev, A.M. Pankratova and N.P. Kuzin. A.I. Strazhev, who presided over the historical section, emphasized that it was necessary to deal with two parts of the problem: the causes of the poor quality of textbooks and the measures for their improvement<sup>29</sup>, while Kuzin and Pankratova went on at length respectively about certain fundamental institutional or more bureaucratic aspects and certain theoretical issues involved in the review process.

#### 1.a. *Nikolai P. Kuzin and the bureaucratic mechanisms of textbook production*

During the conference of 8<sup>th</sup>-10<sup>th</sup> in December 1954, N.P. Kuzin, (1907-1982) a history teaching specialist<sup>30</sup>, gave a speech as of the textbook revision within the School Section (*Otdel shkol*) of the Communist Party. He dwelt on some institutional aspects that concerned the content of the textbooks for polytechnical education, the revision process (including the way in which authors were hired), and the distribution of textbooks with particular attention paid to those on mathematics and physics. Contrary to what one might assume, the revision of textbooks on exact sciences was very complex both because of the bureaucratic nature of the revision process and the disorganization inherent in central planning.

Kuzin agreed that the Academy of Pedagogical Sciences should prepare the theory of a textbook, establish the scientific and pedagogical requirements for textbooks and organize their monitoring<sup>31</sup>. He also observed that the newly

<sup>28</sup> *Ibid.*, p. 121.

<sup>29</sup> *Ibid.*, pp. 120-121.

<sup>30</sup> See Caroli, *New sources for the teaching of history and of the Constitution in the Soviet Union (1917-1965)*, cit., pp. 267-272.

<sup>31</sup> *Doklad Zav. Sektorom uchebnoi literatury Otdela shkol CK partii tov. Kuzina (9 dekabria 1954g.)*, GARF, F. 2306, op. 72, delo 3700, ll. 220-244.

printed textbooks were already under review and that the ones on the natural sciences did not correspond to the needs of polytechnic education and stressed the fact that «a good quality textbook – is the most important tool to improve the quality of teaching in the school»<sup>32</sup>. The Soviet school had the so-called «stable textbooks» (*stabil'nye uchebniki*), which had been amended and supplemented several times in relation to the needs of schools. However, both the Ministry and the *Uchpedgiz* had mistakenly introduced unstable textbooks into schools:

We must not introduce into schools mediocre textbooks in a slapdash way. The school is a delicate organism. Each new book introduces a certain change in the educational process. [*Both teachers and pupils*] must adapt to the new textbook, the teacher must tailor the new educational directives specifically according to it [...] 17 textbooks were introduced into schools in 1954, but 75 million textbooks from previous editions, which had been used prior to the preparation of new textbooks, have been taken out of circulation. Of course this has to be done only when there is complete certainty that the new textbook is undoubtedly better than the old<sup>33</sup>.

Kuzin noted that the textbook, which should have contained fundamental scientific information, did not correspond to the needs of polytechnic schools, because

for textbook, particularly those of the natural sciences, chemistry, mathematics, physics, biology, it is essential to offer skills explained in a practical way in the light of the study tasks of the polytechnical school». The study of the fundamentals of science would provide a basis for the understanding on the pupils' part of the scientific principles of production only if the training provided schoolchildren with the essential tools that would allow them «to navigate the main issues of contemporary production, i.e. in its core areas of energy, machine tools and agricultural and transportation bases<sup>34</sup>.

Kuzin said that in 1954 textbooks on botany and chemistry were published and in the following year there was a plan to edit zoology, the foundations of Darwinism and mathematics schoolbooks, recommending that science textbooks contain practical illustrations. Indeed the textbook on physics (by Peryshkin) was a good example of the scarcity of

material for illustrations of the physical phenomena and of illustrations demonstrating processes of production. In his view this practical side of the textbook content should have been solved through the collaboration of the main administration of the schools and the publisher, meaning probably that teachers could advise on how to present polytechnical exercises.

He argues that:

<sup>32</sup> *Ibid.*, ll. 220-221.

<sup>33</sup> *Ibid.*, ll. 222-223.

<sup>34</sup> *Ibid.*, ll. 223-224.

«The main administration of the schools and the publisher must move beyond the declaration of polytechnic learning and towards the practical solution of the task in hand, based on the experience of schools and teachers<sup>35</sup>.

Indeed, the most dissatisfactory situation occurred with the physics textbook for middle school written by Peryshkin that had provoked many protest letters addressed to the Ministry, and to *Uchpedgiz*, owing to the errors contained in it. In fact the 1955 edition of this book had more than 250 corrections, revisions and amendments to formulas. One teacher said that it was not usable, although it had been printed with a circulation of millions. Indeed, according to Kuzin, a large quantity of errors in the physics textbook by Peryshkin, printed in millions, was a sloppy job (*chaltura*). The ministry did not carry out an interview with the author, the editor and the commission that approved the textbook in order to trace the origin of the mistakes. The result was that the editor in chief of the *Uchpedgiz* was transferred to an Institute of education in Moscow. Also Ponomarev's and Syrnev's mathematics textbook contained errors, despite the fact that the former was also editor-in-chief for mathematics at the *Uchpedgiz*. In fact alongside qualified people, the Ministry also hired people who are unprepared<sup>36</sup>.

Furthermore, several authors were burdened with an excessive amount of work, which creates a special monopoly of authors for textbooks. These authors were ordered to process a large amount of textbooks in a short time. They cannot manage this amount and deliver a poor manuscript in a rush. One should not ignore another phenomenon that some authors of new books are at the same time doing work on other textbooks in one or other publishing houses<sup>37</sup>.

According to Kuzin, when drawing up the contracts it was necessary to know to what extent an author would be free to deliver a quality textbook. Such reliance on a single author who had to complete the revision in one year (Peryshkin, who drew up the physics textbook for years 8-10 was also entrusted with those of years 6-7), forced him to perform the work hastily<sup>38</sup>. In general, the authors were left to themselves after the contract had been agreed, because the Ministry did not summon them, not even when it had chosen novice authors who did not know how to do the work. The Ministry for its part always used the same reviewers and selection committees who should have given way to newly qualified scholars. The organisation of the evaluation of the textbooks, being split between the Academy of Pedagogical Sciences and *Uchpedgiz*, gave superficial results<sup>39</sup>.

<sup>35</sup> *Ibid.*, l. 224.

<sup>36</sup> *Ibid.*, ll. 229-230.

<sup>37</sup> *Ibid.*

<sup>38</sup> *Ibid.*, ll. 230-231.

<sup>39</sup> *Ibid.*, l. 234.

Another cause of the textbooks' lacunae was due to the fact that there was a lack of programs, except for one on the Russian language about which he talked at length. But in general the revision and production process was suffering from an absurd waste in effort and paper mainly caused by the centrally planned mechanism of production and distribution through local state trade organisations.

In the previous two years 74 textbooks for schools had been subject to revisions some of them even twice, not counting 21 textbooks being replaced by new ones, and not to mention the fact that some had been reworked several times: the botany textbook by Tetiurev was corrected in the revision in 1953, reworked for revision in 1954, and was replaced by a new textbook in 1955. The practice of the Ministry of the Russian Federation, chief among others – in fact, the Ministry of Education for the USSR was introduced only in 1959<sup>40</sup> – had been copied such that in the Estonian Republic 47 titles had been reworked. The same thing had happened in Armenia and other republics. In 1951 in Belarus, they removed textbooks from circulation at a cost of 2.5 billion roubles, while in Azerbajdzhan at a cost of 4.5 billion<sup>41</sup>. Kuzin concluded by saying that:

The country does not stint on resources for the publication of school textbooks. Only in the last three years in the Soviet Union 575 billion roubles have been spent on textbooks [...] With the correct organization of trade, there would have been enough for each pupil to have a complete collection of the necessary textbooks. But what happens in reality? From the provinces there are signs that there are not enough textbooks, there are not enough primers, reading books and other manuals<sup>42</sup>.

This was due to the fact that the Minister neglected the issue of the supply of textbooks to schools, whereas there were left over stocks of twenty million textbooks with a consequent huge loss for the State and for schools that did not receive them. There also occurred a sort of hoarding phenomenon of school textbooks but in reality the problem was overproduction. In 1953 the *Uchpedgiz* had produced 130 million textbooks, while in 1954 only 9 million were sold. For this reason Kuzin drew attention to the fact that too many textbooks were printed, and that it would be appropriate to conserve paper for children's books. In conclusion Kuzin called for a better organization of the work by the Ministry of Education<sup>43</sup>.

In general all the textbooks should have corresponded with the program outlined by the XIX<sup>th</sup> Congress of the Communist Party (1952) for polytechnic

<sup>40</sup> O. Anweiler, *Centralisme et fédéralisme dans le système d'enseignement soviétique*, «Revue des études slaves», vol. LVIII, n. 2, 1986, pp. 229-243.

<sup>41</sup> *Doklad Zav. Sektorom uchebnoi literatury Otdela shkol CK partii tov. Kuzina (9 dekabria 1954g.)*, cit., l. 228.

<sup>42</sup> *Ibid.*, l. 241.

<sup>43</sup> *Ibid.*, ll. 241-243.

teaching which still constituted the main ideological framework<sup>44</sup>. According to the requirement written for the December conference, the textbook about Darwinism, for example, which should have contained concepts that would match the «contemporary level of science», the concepts of Biology previously learned had to be elaborated in light of Darwinism. The requirements indicated the structure of the textbook (with introduction and three chapters on the laws governing the development of the organic world; its use in practical activities; the origin and development of life on Earth; the origin of man). The second chapter «Origin and development of life on Earth» employed Engels' basic formulas about life and its origin<sup>45</sup>. The textbook presentation should «not confine itself to the laws governing development of life, but should show their use in the socialist practice of agriculture, because the Party directive of the XIX<sup>th</sup> Congress and the decisions of the plenum of the Central Committee of the Communist Party, in September, attaches great importance «to measures to improve planting and sowing»<sup>46</sup>. The requirements specified that the presentation of the subjects should be based on a bank of concepts and terms already acquired in learning biology; the textbook material must develop students' capacity for logical thinking. The facts and the theoretical, inductive and deductive methods of generalization must be unified. «The textbook must accustom the pupils to the observation of an independent experiments with the living organisms in their natural conditions and in the agricultural production»<sup>47</sup>.

Requirements for the physics and mathematics textbooks have not been found, but in the *Uchpedgiz* lists stored in the archives, of the authors nominated by Kuzin – A.V. Peryshkin for physics, S.A. Ponomarev and N.I. Syrnev for maths, V.A. Tetiurev for botany – some continued to be printed, sometimes in collaboration with others, at least up to 1957/58<sup>48</sup>; the botany textbook remained constant<sup>49</sup>.

<sup>44</sup> *Osnovnye trebovaniia k uchebniku po osnovam darvinizma*, GARF, Fond 2306, op. 72, delo 3708, ll. 324-327.

<sup>45</sup> *Ibid.*, l. 325.

<sup>46</sup> *Ibid.*, l. 326.

<sup>47</sup> *Ibid.*

<sup>48</sup> From the list of textbooks: *Spisk knig, vyshedschich v 1958g*, GARF, Fond 514 (Publishing House for Teaching and Pedagogy), op. 1, delo 240, ll. 5-10: S.A. Ponomarev, N.I. Syrnev, *Sbornik zadach i uprazhnenij po arifmetike, V-VI [Collection of problems and exercises]* (5-e izd.); A.V. Peryshkin, G.I. Faleev, V.V. Krauklis, *Fizika, ch. I dlia 6 klassa [Fisics. Part I for the 6<sup>th</sup> class]* (9-izd.); G.I. Faelev, A.V. Peryshkin, *Fizika, ch. II dlia 7 klassa [Fisics. Part II for the 7<sup>th</sup> class]* (10-izd.); V.V. Krauklis, A.V. Peryshkin, *Kurs fiziki, ch. I. Uchebnik dlia 8 klassa [Fisics course. Part. I. Textbook for the 8<sup>th</sup> class]* (5-izd.); A.V. Peryshkin, *Kurs fiziki [Course of fisics], ch. II Mehanika/prodolzhenie/ Teplota i malekuliarnaia fizika. Uchebnik dlia 10 klassa [Mechanics/Continuation/Heat and the molecular physics. Textbook for the 10<sup>th</sup> class]* (5-izd.); A.V. Peryshkin, *Kurs fiziki, ch. III. Elektrichestvo, optika i stroenie atoma. Uchebnik dlia 10 klassa [Couse of fisics. Part III. Electricity, optics and atom structure. Textbook for the 10<sup>th</sup> class]* (5-izd.).

<sup>49</sup> *Ibid.*, B.V. Vsevsviatskii, *Botanika. uchebnik dlia V-VI kl. [Botany. Textbook for the 5-7<sup>th</sup>*

1.b. *The revision of history textbooks: a synthesis of «science and didactics»*

The intervention at the Conference (8<sup>th</sup>-10<sup>th</sup> December 1954) by Anna M. Pankratova (1897-1957) – historian and authoritative protagonist of history textbooks, well-known for her works on the history of working class<sup>50</sup> and under whose direction the history textbook of the Soviet Union in 1940 (in three volumes) had been drawn up<sup>51</sup>, concerned mainly two aspects: the process of the updating of history textbooks in the field of the historical science and the conception of the history textbook that also involved the novel collaboration of teachers<sup>52</sup>.

Firstly, she reported on the state of the history textbook revision: the textbook for the 8<sup>th</sup> class was in progress under L.P. Bushchik's revision and was shorter in comparison with the one by Bakhrushin and Bazilevich. With regard to the history books, the one for the 9<sup>th</sup> class was being prepared by Bushchik and by another scholar, S.S. Dmitriev with 40 years of experience in teaching. Pankratova was drafting the textbook for the 10<sup>th</sup> class in collaboration with Fokht. In her opinion the renewal of Marxism-Leninism but also the drafting process should be conceived as a collaboration not only between historians, writers and artists but also with teachers. She argued that teachers should present a strict selection of concepts with which they ought to go to the aid of the authors,

but the most important thing – is that the textbook should give to the pupil a Marxist-Leninist vision of the historical process, of the most important processes governed by the laws of the development of society. For this reason in the history textbook there needs to be a concise but absolutely correct illustration of the social formations, of the development processes of the productive forces and production relations and their reciprocity. From the ideological point of view, as a Marxist historian she strived to renew some fundamental aspects of the interpretation of historical development: the role of the popular masses, the history of culture from the perspective of class history and the ideological development of different classes<sup>53</sup>.

The historical narrative outlined by Pankratova presented the first steps of a theoretical revision that led to the condemnation of the cult of personality, because she stated that

*classes]* (3-izd.).

<sup>50</sup> R.E. Zelnik, *Perils of Pankratova. Some Stories from the Annals of Soviet Historiography*, Published by the Herbert J. Ellison Center for Russian East European, and Central Asian Studies, Washington, Seattle and London, University of Washington, 2005, pp. 12-48.

<sup>51</sup> K.V. Bazilevich, S.V. Bakhrushin, A.M. Pankratova, A.V. Fokht, *Istoriia SSSR. Uchebnik dlia VIII klassa srednei shkoly*; Id., *Istoriia SSSR. Uchebnik dlia IX klassa srednei shkoly*, Pod red. A.M. Pankratova, Utverzhdeno Narkomprosom RSFSR, Moskva, Uchebno-Pedagogicheskoe Izdatel'stvo Narkomprosa RSFSR, 1940; Id., *Istoriia SSSR. Uchebnik dlia X klassa srednei shkoly*, Pod red. A.M. Pankratova, Utverzhdeno Narkomprosom RSFSR, Moskva, Uchebno-Pedagogicheskoe Izdatel'stvo Narkomprosa RSFSR, 1940.

<sup>52</sup> Zacharova, Stepanova, *Vserossiiskoe soveshchanie po uchebnikam*, cit., pp. 121-122.

<sup>53</sup> *Ibid.*



these issues of the dialectic of historical development, the transition from one social formation to another must be in all our textbooks which have to hold the line, because they are the common thread of the historical process, which leads to the understanding of the regularity (*zakonomernost'*) of the victory of socialism and communism<sup>54</sup>.

Nevertheless, she continued to quote Stalin's last work which demonstrated that «the productive forces and production relations, on the basis of the historical and dialectical materialism theory, developed in close interaction (*vzaimodeistvie*)» and that «the primary productive force of the historical process is the working man's discipline, the work discipline of the masses who are creators of society's material goods». As a result, «the second main thread of the historical process, which absolutely must be made clear and respected in all the textbook – is the creative role of the masses»<sup>55</sup>.

The creative role of the masses, that progressively erased the cult of Stalin's personality, according to her, had not yet been made manifest to the peasant movement, the labor movement, in national actions, nor in the development of technology, economy and culture. In the textbook for the 8<sup>th</sup> class in fact this role was difficult to describe because of the important role of tsars, generals and other personalities whilst in the textbook for the 10<sup>th</sup> class about the XIX<sup>th</sup> and XX<sup>th</sup> century the creative role of the masses was easier to elucidate. Nevertheless, according to Pankratova, the role of the masses should not only be described in the context of the revolutionary movements but from beginning to end because «the masses are the creator, the founder of material goods, the driving force of history»<sup>56</sup>. Pankratova argued that the creative role of the masses should be a thread woven through the historical narrative in all textbooks from the 8<sup>th</sup> to 10<sup>th</sup> classes because «the creators (*tvorcy*), the popular masses, the makers of material goods, intervene against those who usurp these assets, against those who exploit these masses». The focus on the role of the masses would be «the finish-line of the popular struggle, reached through the victory of the proletarian dictatorship and the building of socialism, with the creation of a classless society»<sup>57</sup>.

Furthermore Pankratova dealt with two important aspects that had to be presented in textbooks. The first was the role of personality in history and the place of Soviet history in world history, that also reinterpreted the role of personality which «would be the through-line of historical development» through the textbooks from 8<sup>th</sup> to 10<sup>th</sup> classes, according to Zhdanov's idea. This line had been neglected but she argued that it was important to understand «those regularities that led, as Lenin says, to the development of the red thread, to the fulfilment of his dictatorship of the proletariat and the victory of socialism»<sup>58</sup>.

<sup>54</sup> *Stenogramma zasedaniia sekcii istorii 9 dekabria 1954 goda. Doklad A.M. Pankratovoi (9 dekabria 1954g.)*, GARF, Fond 2306, op. 72, delo 3705, ll. 3-36 (p. 23).

<sup>55</sup> *Ibid.*, p. 23.

<sup>56</sup> *Ibid.*, p. 24.

<sup>57</sup> *Ibid.*, p. 25.

<sup>58</sup> *Ibid.*, p. 26.

The second aspect was based on the comments by Stalin, Kirov and Zhdanov that consisted in presenting Soviet history «as a world-historical process, its particulars and common traits. The essence lies in underlining what is general and what is particular and special that distinguishes the history of our country from the history of all other countries»<sup>59</sup>. In addition, she recommended the other historians to present better the connection between the history of Russia with world history and the role of culture. She argued that

one should not reduce the history of our country to the history of great Russia, but present it as a history of the peoples of our country: in this history the principle role, as the leading nation, must be played by the Russian people, who cemented other peoples together<sup>60</sup>.

Even if this principle could not be shown in the textbook for the 8<sup>th</sup> class – because the peoples of the Caucasus and Central Asia were not linked with the Russia of Kiev –,

it was necessary to offer the narrative line so that the regularity of this link and the further process of their common struggle against common enemies was evident from the beginning. For Pankratova the role of culture, which was absent because of the Pokrovsky school's predilection for economic and political history, had to be shown from the perspective of class struggle because this is evident in different forms, including even the field of ideology<sup>61</sup>.

Pankratova then approached other issues related with the textbook revision in a more courageous way –, disagreeing openly with the competition system for the publication of the textbooks because she proposed a plurality of textbooks to allow teachers to choose in different parts of the country, saying that «it's the time that the Ministry of Education renounce the single textbook. Why should we be constrained by a single textbook?»<sup>62</sup>.

Pankratova commented on the revision of Bushchik's textbook, which she seemed to appreciate, affirming that it was «the result of a collective creation, the whole collective of teachers». Finally she complained that there had been the same textbook for the 10<sup>th</sup> class for 15 years, but

Perhaps we need to review it, perhaps the State Scientific Publisher may change policy, but its current position is unfair. First, it has its own people, these people whom the State Scientific Publisher know, but nobody else. It's not right. It is necessary to open the doors a little. We are all having problems and we don't have the means to do it. They know three or four names – Kazakov, Karcev, Buschik, Pankratova, and some three or four more, and Kazanchecko and that's all. We need to push back the frontiers a little<sup>63</sup>.

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

<sup>60</sup> *Ibid.*

<sup>61</sup> *Ibid.*, p. 28.

<sup>62</sup> *Ibid.*, p. 29.

<sup>63</sup> *Ibid.*, p. 30.

Pankratova then concluded her speech saying that she would write the textbook with a teacher, A.V. Fokht, with whom she had already worked, because also in the past she had preferred to work with a specialist in didactics (*metodist*). This collaboration between «a scholar thoroughly versed in the Marxist point of view» and a teacher would be successful. She pointed out that:

This cooperation is useful, indispensable. It is not possible to write a textbook whilst separated from the school, it is not possible to write a textbook being separated from science. Further, it is important to be capable of transmitting the meanings of science. It's a difficult thing [...] It's for this reason, in my opinion, it would be good if the *Uchpedgiz* followed this path. Perhaps this collective will suggest other ways of mobilizing creative initiative<sup>64</sup>.

In her final answers to the participants' questions about the new periodization of the *Short Course of Stalin* and the role of personality in textbooks, she replied that «we need to approach in a Marxist way the question of the assessment of the role of the masses and of personality»<sup>65</sup>. To the participants who asked questions about the mistakes in dealing with the role of personality, because «there was a mix of the cult of personality and the role of personality», she replied that «the cult of personality was a deviance (*otstuplenie*) from Marxism while «we are compelled to show the role of personality, as required by Marxism, but we need also to avoid the schematisation of Pokrovsky», who had, according to her, caused economic and political history to coincide resulting in the complete sidelining of the role of personality in history<sup>66</sup>. These considerations, although in part still oriented towards the official ideology (through quotes of Zhdanov and Stalin) anticipated the renewal of the historical sciences in the following decade, to which we will devote the second part of this article.

The results of the conference on textbooks had a concrete impact and in the archives we find the pedagogical requirements for the publishing of textbooks on history that make it possible to understand in which ways the connection between «science and didactics» had been realized, while the archive of the State Publishing House for Teaching and Pedagogy (*Uchpedgiz*) conserves lists of textbooks printed from 1956 until 1958 that show the fate of the textbooks (if authors continued to print or with whom, or if there were new textbooks).

In accordance with the directives of the XIX<sup>th</sup> Congress which had requested an improvement of textbooks for secondary schools, the requirements for history textbooks (prepared according to the 1954 Conference), presented some elements in common with Pankratova's speech, claiming that the textbooks had to give the foundations of historical knowledge, and were considered important for the communist education. According to the requirements, textbooks should transmit «the most important facts and laws of the development of historical

<sup>64</sup> *Ibid.*, p. 32.

<sup>65</sup> *Ibid.*, pp. 32-34.

<sup>66</sup> *Ibid.*, p. 35.

science with the consideration of the pedagogical issues» and one should choose the most suitable topics for the psychological level of the pupils<sup>67</sup>.

The requirements concerned didactical aspects such as the need to understand the facts and avoid mnemonic learning (the method of *konspektirovanie* facilitated the memory but did not favor this understanding from the point of view of the Marxist vision). The inductive method after the general presentation of the facts was important «for the exercise of the creative thinking of the student, it improves the quality of his thought. Even the generalized schematic presentation that contains many deductive items is of great significance for the education of thought»<sup>68</sup>. All history textbooks should be reduced and as Pankratova stated the textbooks should «present the historical facts as a regular historical process and in the middle put the story of the working masses, the history of peoples, to show the people as the creator of history»<sup>69</sup>.

History textbooks being reviewed in 1954 according to these requirements, were printed until 1958 with the exception of the textbook of F.P. Korovkin, *History of the Ancient World*, that was printed for the first time. A novelty introduced in 1958 was that for the 8<sup>th</sup> and 9<sup>th</sup> classes, because there were two textbooks, teachers could choose between them<sup>70</sup>. This was the first result of the de-Stalinization of textbook production.

## 2. *Discovering the people who created history*

The desire for renewal of the historical sciences was expressed on the one hand through the revision of history textbooks and on the other in the publication of a series of articles about the didactics of history that sought to recognize the role of the Soviet people in the innumerable victories throughout their history and in particular during the Second World war. These two processes were parallel

<sup>67</sup> *Trebovaniia k uchebnikam istorii dlia 5-10 klassov srednej shkoly*, GARF, FOND 2306, op. 72, delo 3700, pp. 382-395.

<sup>68</sup> *Ibid.*, p. 383.

<sup>69</sup> *Ibid.*, p. 384.

<sup>70</sup> From the document: *Spisk knig, vyshedshchich v 1958g*, GARF, Fond 514, op. 1, delo 240, ll. 5-10 «F.P. Korovkin, *Istoriia drevnego mira. Uchebnik dlia 5-6 klassa [History of the Ancient World. Textbook for the 5-6 classes]* (1 Izd.); E.A. Kosminskij, *Istoriia srednich vekov. Uchebnik dlia 6-7 klassa [History of the Middle Age. Textbook for the 6-7<sup>th</sup> classes]* (5-oe izd.); L.P. Bushchik, *Istoriia SSSR ch. I. Uchebnik dlia 8 klassa [History of the USSR. Part I. Textbook for the 8<sup>th</sup> class]* (2 Izd.); K.V. Bazilevich, S.V. Bachrushin, A.V. Focht, A.M. Pankratova, *Istoriia SSSR. Uchebnik dlia 9 kl. [History of the URSS. Textbook for the 9<sup>th</sup> class]*; K.V. Bazilevich, S.V. Bachrushin, A.M. Pankratova, A.V. Focht, *Istoriia SSSR. Uchebnik dlia 10 kl. [History of the URSS. Textbook for the 10<sup>th</sup> class]* (17 izd.); A.V. Efimov, *Novaia istoriia. Uchebnik dlia 8 klassa [Modern History. Textbook for the 8<sup>th</sup> class]* (17 izd.); I.S. Galkin, L.I. Zubok, A.Ia. Manusevich, F.I. Notovich, V.M. Khvostov, *Novaia istoriia. Uchebnik dlia 9 klassa [Modern History. Textbook for the 9<sup>th</sup> class]*. Pod red. V.M. Khvostova (13 izd.)».

because they had to provide the guidelines for history teachers who would be thrown by the continuous changes to the textbooks for their lessons. The new textbooks were indeed not to be considered the last ones.

Anna M. Pankratova introduced the new Soviet course of historical sciences at the X<sup>th</sup> Congress of historians in Rome (4<sup>th</sup>-11<sup>th</sup> September 1955), with a speech about «Le problème de l' historicisme et la période contemporaine» – (a concept which, however, should not be confused with that of historicism in Russia) –<sup>71</sup> in which she no longer mentioned Stalin's name, but lingered on a series of historiographical problems related to the concept of «historisme» by which she meant «a comprehensive examination of the historical process as a whole, in all its complexity, its contradictions and what it possesses which is concrete»<sup>72</sup>.

The Marxist historian criticized both Pokrovsky's conception and those of the American sociologist Charles Beard (1874-1948), the British philosopher Robin George Collingwood (1889-1943) and the Italian philosopher Benedetto Croce (1886-1952). According to her, they expressed «subjective opinions» such as «it is the people who make history» which she considered to be unscientific. Pankratova explained that «Marxism doesn't claim that instead of the people it is economic relations that make history, on the contrary, historic materialism teaches us that it is people that make history. The conditions of material life in society determine opinions, ideas, people's behaviour»<sup>73</sup>. The clearest example of the «driving forces of the new society» was the war against the fascists of Germany during which «Soviet patriotism and the moral and political qualities of all the Soviet people ensured the success of the radical transformation of the Soviet country»<sup>74</sup>.

These narratives of «driving forces» by Pankratova anticipated the condemnation of the cult of Stalin's personality, whose name disappeared from the history of the Second World War, and the renewal from the teaching perspective that accompanied the revision of the textbook for the 10<sup>th</sup> class<sup>75</sup>. After the XX<sup>th</sup> Congress of the Communist Party «the focus was the global demonstration of the role of the people as the creator of history and was illustrated in a more profound and clear way in the figure of Lenin of the Communist Party»<sup>76</sup>. This

<sup>71</sup> E.C. Thaden, *The Rise of Historicism in Russia*, New York, Peter Lang, 1999.

<sup>72</sup> A.M. Pankratova, *Le problème de l' historicisme et la période contemporaine*, in Comitato Internazionale di Scienze Storiche *Atti del 10. Congresso internazionale: Roma 4-11 settembre 1955*, edited by the Giunta Centrale per gli Studi storici, Roma, 1957, pp. 86-93.

<sup>73</sup> *Ibid.*, p. 87.

<sup>74</sup> *Ibid.*, p. 88.

<sup>75</sup> N.M. Druzhinin (ed.), *Sovetskaia istoricheskaia nauka ot XX do XXII s'ezdu KPSS. Istoriia SSSR. Sbornik statej pod. red. M.V. Nechkinoi, E.N. Gorodeckogo, Ia. A. Levickogo, M.I. Michailova, K.N. Tarnovskogo*, Moskva, Izd. Akademiia nauk SSSR, 1962, discussed by A.T. Kinkul'iakin, *Sovetskaia istoricheskaia nauka ot XX k XXII S'ezda KPSS*, «Prepodavanie istorii v shkole», n. 6, 1962, pp. 95-102.

<sup>76</sup> *Ibid.*

change of perspective allowed for a way of teaching scientific history, based on laws of development (*zakonomernosti*) in accordance with Marxism-Leninism. It also gave teachers room to adopt new teaching methods, especially in the 10<sup>th</sup> class where they could teach the Second World War in a more interesting way, with no fear of ideological control that they had been subject to during the post-war years.

### 2.a. *The renewal in the didactic teaching about the Second World War*

The debate arose in the journal «The teaching of history in schools» (*Prepodavanie istorii v shkole*) and concerned the teaching of history in general, but in particular the teaching of the Second World War primarily because the war was the most important experience in recent collective memory. But also because, according to the Pankratova speech, which anticipated the condemnation of the cult of personality, the people, the mass, had become the protagonist of the historical drama and it was the teacher's responsibility to show how it was historical processes governed by laws that had led the people to be the authors of history.

In the debate that emerged among historians, educational specialists and teachers in the course of 1954 to 1962/63, it is possible to identify two main trends that aimed to renew teaching practices in order to present history as a more interesting discipline for study. The first concerned local research of documentation, written or oral, usually stored in local ethnography museums. The second was to investigate the so-called laws of historical facts or economic facts, emphasizing the role of the people in the history of the Second World War.

With regard to the first tendency, it had been initiated by the same Kuzin, who had been its champion since 1946, and who had engaged in the renewal of teaching methods through the use of ethnographic material such as local historical documents, whether oral or written testimony<sup>77</sup>. Returning to relaunch the use of local historical material (*kraevedcheskii material*, literally «ethnographic material») in the context of the patriotic education that characterized schools after World War II, he pointed out that this method should be intended as a history of the native region (*rodnoi krai*) and was to be considered ideal for the teaching of Soviet patriotism<sup>78</sup>.

Echoing Lenin's famous expression about legality in post-revolutionary Russia, according to Kuzin «the Soviet man's home was not the Kaluga region nor Vologda, nor that of the Krasnodar or Vladivostok regions. They are just a place of birth, the homeland is the entire Soviet Union. The native region

<sup>77</sup> Caroli, *New sources for the teaching of history and of the Constitution in Soviet Union (1917-1965)*, cit., pp. 267-272.

<sup>78</sup> N.P. Kuzin, *Vospitatel'noe i obrazovatel'noe znachenie primeneniia kraevedcheskogo materiala v prepodavanii istorii SSSR*, «Prepodavanie istorii v shkole», 1954, n. 2, pp. 55-68.

– is an indivisible part of the powerful Soviet fatherland»<sup>79</sup>. Disagreeing with the opinion that the love of country had to start from the «three birch trees», that is, from a «natural feeling of love and attachment to native places», Kuzin thought instead that the concept of home for children was much broader since it consisted in «the socialist transformations in our country which are first and foremost the object of national pride»<sup>80</sup>.

According to the historian, fighters and heroes had sacrificed themselves for the socialist country and not for the native land. These actions, interpreted in a Marxist-Leninist light, constituted the Great History of which Stalin and «the Union of invincible Republics» as the Soviet anthem had it, were no longer the protagonists, but it was the people who had been the authors of victory in World War II. This didactical trend was very persistent as it led to a sort of “real cult” around the memory of the Second World War victims and allowed people to deal with issues such as the human loss of the War that had long been a kind of taboo<sup>81</sup>. The complex issue of human losses, the reasons for the deaths that children had seen face to face and witnessed during the World War, was touched upon indirectly in an article, which suggested teachers explain to pupils

The peculiarity of the first period of the Second World War, showing the enormous difficulties which had arisen as a result of the aggression of fascist Germany in the Soviet Union, explaining the causes of the series of defeats in the Soviet military actions which it was later necessary to atone for with a high price<sup>82</sup>.

The «high price» of about 25 million victims was indeed the main historical falsification of the history textbooks that has been recognized since the Fall of Communism<sup>83</sup>. Nevertheless, the new approach in teaching history was much appreciated among the same teachers who went in search of concrete facts in the local ethnographic museums that preserved a wealth of information on local events related to the Second World War. Among them, a teacher of the Bryansk region proposed a lesson on the basis of the regional material in which he stressed that to improve the level of historical knowledge of the pupils from the cultural and educational point of view, it was not only necessary to improve teaching methods, but also to use literature, ethnographic material and teaching aids such as maps that would give substance to the lesson. In fact, after the explanation

<sup>79</sup> *Ibid.*, p. 56.

<sup>80</sup> *Ibid.*

<sup>81</sup> D. Caroli, *Soviet Children's writings: school exercise books, letters to the Authorities, personal diaries and war memories*, «History of Education and Children's Literature», vol. VII, n. 1, 2012, pp. 201-239.

<sup>82</sup> A.V. Vasil'ev, *O pervoi periode Velikoi Otechestvennoi voiny*, «Prepodavanie istorii v shkole», n. 1, 1957, pp. 9-22.

<sup>83</sup> S.S. Oganovskaia, *Shkol'nii uchebnik otechestvennoi istorii. Uchebnye izdaniya kak istoricheskii istochnik*, in *Dokument. Archiv. Istoriia. Sovremennost'*, Vyp. 12, Ekaterinburg, Izdatel'stvo Ural. Instituta, 2011, pp. 264-286.

of the «fight of the heroic Soviet partisans», he used in particular material from the ethnographic museum because «many parents of the pupils have actively participated in the partisan movement, residents have lived through all the horrors of Hitler's tyranny»<sup>84</sup>. To complete the lesson, the teacher presented readings from literature on the Second World War written by local authors, as oral testimonies were not yet being used during school hours.

The second trend – which was strictly connected with the first –, concerned the study of historical laws, in an effort to develop an educational theory, as shown by A.Z. Red'ko. He argued that the teaching of history whose object of study is the process of studying history in schools, establishes rules that, on the one hand are manifestations of the rules of general education and, on the other «are by nature specific to the rules of studying history on the part of the pupils»;

These rules have great significance for the choice of the content being studied by schoolchildren and for the choice of the most sensible methods used in the learning process. The two tasks of the teaching of history – the choice of precious material from a cognitive and educational point of view and the development of learning methods – have to be decided in close cooperation with each other<sup>85</sup>.

How was it possible to teach historical laws to children? Through the newly discovered role of the people in history. The rediscovery of the role of the people which corresponded to the official representation of war as epic of a nation united against the invader, called fascist, was inaugurated by an editorial of the magazine entitled «The Great Victory of the Soviet people». In this article the people passed in the foreground: «The Soviet people, lover of freedom, and its valiant Armed forces have won a victory over the enemy». There is no reference to the role of Stalin, though the article evoked the words of his speech about the intentions of Nazi Germany<sup>86</sup>. After describing the position of different countries during the Second World War, the article continued with the description of the role of the Soviet people also in international politics, with a new discourse of defender of the peace: «the Soviet people, creating the magnificent edifice of communism, fought tirelessly for the maintenance and strengthening of peace throughout the world. The Soviet Union's foreign policy in the postwar years, as well as throughout its history, is based on the principle of international cooperation and friendship among peoples»<sup>87</sup>.

Also according to P.S. Leibenburg, a teacher fully versed in the methodological aspects of the preparation of textbooks, the textbooks should transmit concepts and laws, and in this regard the Second World War was hugely educational

<sup>84</sup> A.P. Ostrovkii, *Izuchenie temy "Geroicheskaia bor'ba sovetskikh partizan". Iz opyta ispol'zovaniia*, «Prepodavanie istorii v shkole», n. 2, 1959, p. 67.

<sup>85</sup> A.Z. Red'ko, *Nekotorye voprosy metodiki prepodavaniia istorii (K diskussii o metodike prepodavaniia istorii kak nauke)*, «Prepodavanie istorii v shkole», n. 5, 1955, pp. 76-83.

<sup>86</sup> [s. a.], *Velikaia pobeda sovetskogo naroda*, «Prepodavanie istorii v shkole», n. 3, 1955, pp. 3-11.

<sup>87</sup> *Ibid.*, p. 10.



in character<sup>88</sup>. Leibenburg stated that attention was not being accorded to the reality of the main conditions set out in the textbook by means of teaching aids, documents or literature, and thus the level of teaching was being diminished. Furthermore textbooks did not pay enough attention to the difficult situations that «the Soviet people and its armed forces have faced during the Second World War», the analysis of the conditions that led to the failure of political and military calculations of fascist Germany nor to «the presentation of the moral-political unity of the Soviet people during the war years»<sup>89</sup>.

On the basis of the concrete facts the teachers had to show how «the Soviet people, led by the Soviet Communist Party under the conditions of the heaviest and cruellest of all the wars ever experienced by our homeland, has overcome great difficulties and has reported a historic world victory over the Germans, Hitler and imperial Japan»<sup>90</sup>.

The discourse of the people as a creator of history soon came to coincide with the one about the Soviet Union as a Superpower Nation.

*2.b. The revision of the history textbook directed by Anna M. Pankratova: from the synthesis of «science and education» to the connection between «school and life»*

The revision of the history textbook directed by A.M. Pankratova lasted several years and was conducted in the context of school reforms that introduced elements of polytechnic education. This educational project was aimed at reviving the Marxist project that combined theory and practice, not only in an effort to professionally train adolescents thereby broadening their knowledge of general culture, but also to further in the interests of economic development. The reform, which modernized the country, took place in stages and was accompanied by constant attention paid to school textbooks that had been revised to this end since the XIX<sup>th</sup> Congress of the Communist Party. The revision of textbooks had a huge political purpose. The new schools required updated textbooks on the bases of scientific knowledge that had to provide students with an education on a par with, if not superior, to the capitalist countries.

In December of 1955, polytechnic education was introduced in secondary schools in Russia's countryside, and in September of the following year in primary and middle schools<sup>91</sup>. These changes were a prelude to the Khrushchev school reform of December 1958 which aimed to revive the polytechnic

<sup>88</sup> P.S. Leibenburg, *Zavershenie voennogo razgroma gitlerovskoi Germanii v 1945g.*, «Prepodavanie istorii v shkole», n. 1, 1958, pp. 36-44.

<sup>89</sup> *Ibid.*, p. 37.

<sup>90</sup> *Ibid.*

<sup>91</sup> Coumel, «*Rapprocher l'école et la vie?*» *Une histoire des réformes de l'enseignement en Russie soviétique (1918-1964)*, cit., pp. 101-104.

education project, as Marx had wished, combining theory and practice, although the Academy of Pedagogical Sciences remained non-committal in its practical application<sup>92</sup>. With the launch of the school reform of March 9<sup>th</sup>, 1958, known as the «Khrushchev reform», a new revision of textbooks loomed, to accompany the revision of school subjects being taught: the school was divided into two levels (8 years of compulsory education, followed by two non-compulsory years, 9-10). In fact, this change reached its climax on November 12<sup>th</sup>, 1958 with the decree «On strengthening the relationship between school and life and the further development of the public education system», which planned to combine work and learning about the fundamentals of the sciences in connection with productive work and agriculture.

Since 1957, under the direction of Pankratova and with her collaboration, the textbooks *History of the Soviet Union* for years 9 and 10 were further revised. The main revision consisted in the fact that the third part for the 10<sup>th</sup> class, in addition to the chapter on World War II introduced in the 1945-1948 editions, added a chapter on communism after the war that included the XX<sup>th</sup> Congress of the Communist Party and reforms initiated by Khrushchev<sup>93</sup>. This chronological extension that was absent in most of the European textbooks, would have afforded a better understanding of recent events, the transformations of the socialist economy, and the linking of «school and life» in communist society. This chapter on post-war communism, in fact, stopped in 1956 with the description of the international situation and the fourth five-year plan<sup>94</sup>.

During 1958/59 the debates on the reform of teaching of history aimed to include some modern and contemporary foreign history in the 7<sup>th</sup> and 8<sup>th</sup> years, to ensure an elementary basic grounding not only in these countries' past but also a better understanding of the role of the Soviet Union in modern and contemporary history. On the basis of a project of the Academy of Pedagogical Sciences elaborated on 20<sup>th</sup>-21<sup>st</sup> April 1959, the decree of 8<sup>th</sup> October 1959 established 72 hours of history in the 5<sup>th</sup>, 6<sup>th</sup>, and 7<sup>th</sup> classes, 105 in the 8<sup>th</sup> (that is during all compulsory school years) and 180 hours in the 9<sup>th</sup> and 10<sup>th</sup>. In addition, chronology and linear development was abandoned in favour of three historical phases: the history of the Soviet Union in the 4<sup>th</sup>, an elementary course from the 5<sup>th</sup> to 8<sup>th</sup> years and a systematic in-depth course in the 9<sup>th</sup> to the 10<sup>th</sup> years<sup>95</sup>.

<sup>92</sup> *Ibid.*

<sup>93</sup> K.V. Bazilevich, S.V. Bakhrushin, A.M. Pankratova, A.V. Fokht, *Istoriia SSSR. Uchebniki dlia VIII klassa srednej shkoly*, Pod red. A.M. Pankratova, Utverzhdeno Narkomprosom RSFSR, Moskva, Uchebno-Pedagogicheskoe Izdatel'stvo Narkomprosa RSFSR, 1957 (16 izd.), pp. 260-280.

<sup>94</sup> *Ibid.*

<sup>95</sup> Bushchik, *Ocherk razvitiia shkol'nogo i istoriceskogo obrazovaniia v SSSR*, cit., pp. 424-426; Tchernychev, *L'enseignement de l'histoire en Russie*, cit., pp. 37-38.

The decree of 8<sup>th</sup> October 1959 indicated that the course of history in secondary schools must inculcate in pupils a conception of history that fully corresponded with the revision presented by Pankratova in 1954:

A conception of the laws of evolution of society (in an understandable way), giving to students an understanding of the certain inevitability of the fall of capitalism and the victory of socialism, and to show the role of the masses as the motor of history, creator of values both material and moral, as well as the individual's significance in history<sup>96</sup>.

According to the same decree, history «must imbue youth with the spirit of communist morality, intolerance towards bourgeois ideology, the spirit of socialist patriotism and proletarian internationalism, with a deep respect for work, and must allow for the preparation of students for an active social life»<sup>97</sup>. Similar values were attributed to history in the decree of January 9<sup>th</sup>, 1960, although communist morality was presented with even greater emphasis<sup>98</sup>.

In relation to the new course of history provided in reformed schools by the «Khrushchev reform» (1958), in 1959 the historian A.I. Strazhev addressed the problem of teaching methodology. In relation to the plan launched after the XXI<sup>st</sup> Congress, all school subjects were encompassed so that «a link between school and life with productive work», including history could be guaranteed. Strazhev's narrative of history drew examples from the Twenties – considered now the model for communism – and in particular in the history of labour and of the working masses in order to illustrate the links between school and life<sup>99</sup>.

After the foregrounding of the people's role in Russian history, now the role of labour and of the working masses became the new elements of the historiographical canons of the Sixties. Pankratova's textbook was amended one more time and in 1962, it was reprinted for the 21<sup>st</sup> time, with the addition of the chapter «On the mature development of communism» concerning the politics of the XXI<sup>st</sup> Congress of the Communist Party which promoted a new work ethic that probably the polytechnic schools had not yet managed to inculcate<sup>100</sup>. Pankratova's textbook was the most long-lasting textbook in Soviet schools and its revision was the result of the ideological changes that occurred during de-Stalinization.

The de-Stalinization of school textbooks consisted in the changes made to the official Marxist interpretation, thereby revealing a fluctuation in ideological arguments and an attempt to close the chapter on the traumatic experience of

<sup>96</sup> Tchernychev, *L'enseignement de l'histoire en Russie*, cit., pp. 38-39.

<sup>97</sup> *Ibid.*

<sup>98</sup> *Ibid.*

<sup>99</sup> A.I. Strazhev, *Nekotorye voprosy metodiki prepodavaniia istorii v sviazi so shkol'noi reformoi*, «Prepodavanie istorii v shkole», n. 2, 1959, pp. 34-41.

<sup>100</sup> K.V. Bazilevich, S.V. Bakhrushin, A.M. Pankratova, A.V. Fokht, *Istoriia SSSR. Uchebnyk dlia VIII klassa srednej shkoly*, Pod red. A.M. Pankratova. Utverzhdeno Narkomprosom RSFSR, Moskva, Uchebno-Pedagogicheskoe Izdatel'stvo Narkomprosa RSFSR, 1962 (21 ed.), pp. 260-283.

Stalinism. It also had to confront the various problems of the central planning and production of textbooks, which nevertheless were considered a very important tool for the technological and scientific development of the Soviet Union and for her image as a Superpower Nation.

### *Conclusion*

This article has presented the de-Stalinization process of textbooks, investigating the characteristics of planning, distribution and content review, with special attention paid to history textbooks from 1953 to 1962. This process, in fact, was not only related to the content that presented a renewal of the categories of Marxist interpretation after the condemnation of Stalin's cult of personality but also the same manufacturing process that needed to be improved both in terms of preparation and distribution.

Among the most interesting aspects of the renewal that took place within the framework of Marxism-Leninism is a willingness to consider them as a creative work synthesis of «science and didactics», implying a collaboration with teachers and their teaching methodologies that in the Soviet Union as in other European countries, sought to renew the teaching of history in a more participatory exchange.

Changing interpretative categories and new teaching methodologies also contributed for their part to the rehabilitation of the relationship between general history and local history, with a space, although still limited, for individual memories of the Soviet Union during the Second World War which had been sacrificed to a monolithic vision of history. It was a process that reached its peak in 1962, with the latest revision of the textbook directed by Pankratova that tried to connect «school with life» in the 21<sup>st</sup> edition, the last edition but one.

# The *Source of Truth or Path to Virtue* brochure and the apprehensions about the Nineteenth century primary instructions in the Sergipe Province

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**ABSTRACT:** This study aims at analyzing and describing aspects of primary education in the Sergipe Province from the use and prohibition of the *Source of Truth or Path to Virtue* brochure (1841). The spatial framework of the research is the Sergipe Province, from 1833 to 1835. The main sources are: *Source of Truth or Path to Virtue* brochure, mails from primary teachers, reports from the Provincial President and the educational legislation of the time. Methodologically, it resorts to the guidelines developed by Ginzburg, through the evidentiary method and the concept of circularity exploited by cultural historian Darnton. In the sources here analyzed, it was possible to make a triangulation of data and it allowed an analysis and description of the aspects of primary education in the Sergipe Province through 1833-1835 mediated by educational legislation of the time.

**EET/TEE KEYWORDS:** Primary Education; Educational Legislation; History of Education; Brasil; XIX<sup>th</sup> Century.

## *Introduction*

The nineteenth-century primary education in Brazil, at least from the point of view of legal action, was initially marked by the enactment of the Schools of First Letters Law. Dated October 15, 1827 when Don Pedro, Constitutional Emperor, published this law giving strict orders for the creation of first letters schools in all cities, towns and most populous parts of the Empire.

In this law, there is the guarantee of expansion of primary public education and ensured in Article 11 girls access to primary education: «There will be girls' schools in the cities and most populous villages, where the Presidents of the Council deem necessary»<sup>1</sup>. This expansion, with assurance that in all crowded places of the Empire there were schools of first letters, as well as admitting these lessons to girls, is a «[...] way of referring to the school that wanted to generalize to all the people»<sup>2</sup> and reflected the Empire's willingness to assign specific responsibilities to provinces to carry out this teaching, since it was the constitution of 1824 which regulated the education, which provided in Article 179 primary education to all citizens and its implementation, preferably by family and church.

This law was characterized as a state organization strategy, because the organizational dynamics of the general education permeates one of any nation's obligations. As for this law, Faria Filho (2010) concludes as follows:

This law is contemporary of a slow, but gradual, strengthening of a political-cultural perspective for the construction of the Brazilian nation and the National State that saw in the instruction one of the main civilizing strategies of the Brazilian people, as important parts of the elite conceived and proposed to organize. Instruct the 'lower classes' was fundamental task of the Brazilian state and at the same time, the same condition of existence of this state and nation<sup>3</sup>.

To educate the population with access to first letters classes, the law provided teacher's obligations, outlining the method and the content to be taught. Article 6 noted that:

<sup>1</sup> Brasil, *Law of 15 of October, 1827. Tell to create First Letters Schools in all cities, villages and places that have many people in the Empire*, available at: <[http://www.planalto.gov.br/ccivil\\_03/Leis/LIM/LIM-15-10-1827.htm](http://www.planalto.gov.br/ccivil_03/Leis/LIM/LIM-15-10-1827.htm)> (last accessed: March, 3<sup>rd</sup>, 2014).

<sup>2</sup> L. Mandes Faria Filho, *Elementary Instruction in the 19<sup>th</sup> century*, Belo Horizonte, Autêntica, 2010, p. 136.

<sup>3</sup> R. Darnton, *The matter of books: past, present e future*, São Paulo, Companhia das Letras, 2010, p. 137.

Teachers are going to teach reading, writing, the four arithmetic operations, practice of fractions, decimals and ratios, the more general concepts of practical geometry, the national language grammar, and the principles of Christian morality and the doctrine of the Catholic and apostolic Roman religion, provided to the understanding of boys; giving preference to the reading of the Constitution of the Empire and the history of Brazil<sup>4</sup>.

Unlike what provided the law that regulated primary education in Brazil in the first decades of the nineteenth century, where reading and writing was provided concurrently and for both sexes, in Spain «in the early nineteenth century there were schools that taught only reading to girls, because they were supposed to read, but not to write»<sup>5</sup>. Such difference remained until the second half of the century, from that time on writing has become as necessary as reading. However, in addition to providing the teaching of reading and writing, we call the attention to Article 6 in this law that created the first letters schools. In fact, we must highlight in that Article the teachings on the «principles of Christian morality and doctrine of the Catholic religion and Roman Apostolic», as this study aims at analyzing and describing aspects of primary education in the Sergipe Province using the prohibited *Source of Truth of Path to Virtue* brochure, which is characterized «as a tutoring of implied and explicit moral truths, that should form the basis of universal religion»<sup>6</sup>.

This form had been adopted as a teaching resource<sup>7</sup>, to be used by primary school teachers, by the President of Sergipe Province, José Joaquim Geminiano Navarro Morais (entitled on October 29, 1833 and removed from office on February 01, 1835). However, on June 15, 1835, the former President, Mr. Manoel Ribeiro da Silva Lisboa (entitled on February 13, 1835 and dismissed on October 10, 1835), suspended the use of such instructions. Claims for such suspension is the main problem presented in this study and are going to be presented throughout the text.

Therefore, the spatial framework of this study is the Sergipe Province, from 1833 to 1835. The main sources are: Source of truth of Path to Virtue brochure; mails issued by primary teachers in 1835 and which were addressed to the President of the Province or the Secretary of Government which had as common content the suspension of the aforementioned booklet; Report from the President Manuel Ribeiro da Silva Lisboa, from 1835; the educational

<sup>4</sup> Brasil, *Law of 15 of October, 1827*, cit.

<sup>5</sup> T. González Perez, *Teaching to be women: literature to girls in history of education*, «History of Education & Children's Literature», vol. IV, n. 1, 2009, p. 97.

<sup>6</sup> All quotes present in this study, either taken from the *Source of Life of Path to Virtue* brochure, or from the mails and report of the President of Sergipe Province, met the Portuguese written criteria (spelling, abbreviations) and vocabulary of the nineteenth century (See J.A. da Silva Teixeira, *Source of Truth or Path to Virtue*, Porto, Typographia Commercial Portuense, 1841, p. 4).

<sup>7</sup> G. dos Santos Lima, *The Schoolling Material Cultura: unveiling the creation of First Letters Instruction in the Province of Sergipe (1834-1858)*, São Cristóvão, 2007, p. 45.

legislation of the time: the Imperial Act of October 15<sup>th</sup>, 1827 and the Provincial Law of March 5<sup>th</sup>, 1835, both deal on public education; and historical works that discuss the topic studied here.

In order to operate methodologically with the sources of this study, we used the guidelines developed by Ginzburg, through the evidentiary method, as «interpretation focused on residues, on marginal data, considered revealing»<sup>8</sup>. We here seek to appreciate the specificities of each object or each source and develop an «analytical reconstruction», through differences of the educational process experienced in primary education in Sergipe Province. Thus «reconstruct the face, partially obscured, of their culture and social context in which it was framed»<sup>9</sup> becomes the object of investigation.

In order to analyze the *Source of Truth or Path to Virtue* brochure we referred to the concept of circularity from the cultural historian ideas Darnton (2010). To understand why this booklet was prohibited it is also necessary to understand that reading practices have a history linked to the media in which texts are served, as well as the place and time when the reading occurs.

With Darnton it was possible to understand the trajectory of the book, its life, its story. Thus, the trend of this study is to deepen circularity from the history of the book, the printing, brochures, as well as their reading, their use or prohibition. Therefore, to understand the dynamics of the book «is to understand how ideas were transmitted in printed form and how exposure to the printed word affected the thinking and conduct of mankind»<sup>10</sup> In this sense, a reflection from Chartier also helps in understanding the relationship between the book, the printed texts, the brochure and practices involving their uses, because

it is necessary to vigorously remember that there is no text outside the support that gives it to read, that there is no understanding of a written text, whatever it may be, that does not depend of the ways through which it reaches the reader<sup>11</sup>.

For Darnton<sup>12</sup> there are various ways to deepen the study of the book, from anywhere it is possible to understand the printed text, the brochure, the book; it is what he calls «circuit of its transmission». These forms or points to obtain knowledge about a particular printed text are in the drafting stage, when the text is molded and the dissemination is orchestrated; in the printing stage, when the quantitative of issues is analyzed; in the assimilation stage, as on the shelves of

<sup>8</sup> C. Ginzburg, *Miths, badges and signals: morphology and history*, São Paulo, Companhia das Letras, 1989, p. 149.

<sup>9</sup> Id., *The cheese and the worms: the everyday life and the ideas of a miller stocked by Inquisition*, São Paulo, Companhia das Letras, 2006, p. 9.

<sup>10</sup> R. Darnton, *The matter of books: past, present e future*, São Paulo, Companhia das Letras, 2010, p. 190.

<sup>11</sup> R. Chartier, *The cultural history: between practices na representations*, Lisboa, Difel, 2002, p. 127.

<sup>12</sup> Darnton, *The matter of books: past, present e future*, cit., p. 196.



libraries, either by readers; and the stage of diffusion or spread of the already printed material.

Darnton highlights in the last stage the role of the book salesperson. In this perspective of the stages that here make up the elements of circularity, it is noteworthy that «were directly affected by social, economic, and political conditions as well as intellectuals of the time»<sup>13</sup> in which the book was produced.

The intention of this study when analyzing the *Source of Truth or Path to Virtue* brochure was to reveal from this stage scheme proposed by Darnton, the elements of this leaflet. It is true that, some of these stages, due to unavailability of information, were not explained, but that did not inhibit the analysis on the process of text transmission, at least in the spatial area proposed for the research, which is the Sergipe Province.

### 1. *The suspension of the Source of Truth or Path to Virtue brochure*

The main issue raised in this study concerns the motivations that led the President of the Sergipe Province, Mr. Manoel Ribeiro da Silva Lisboa, to prohibit the use of the *Source of Truth or Path to Virtue* brochure in the classroom. For this study we analyzed (nineteen) mails that were issued by sixteen teachers and three teachers of first letters to the President of the Province or the Province Secretary. In these mails, specifically the ones from 1835, dated between the months of June, July and August, there is a common content to all: teachers communicate to the recipient that they have received an express order not to use the *Source of Truth or Path to Virtue* brochure in first letters classes. This express censorship incur the need to explain what made the President of the Province make this decision.

As for, finally the books and textbooks from where I teach, there should not be any others, besides the ones that were sent to me by the predecessor of Your Excellency. With the title of *Source of Truth or Path to Virtue* but that were prohibited by Your Excellency, their opening in Classes, I started not to consent my Disciples to bring them<sup>14</sup>.

It is noted that the primary teacher Maria Diniz Rodrigues de Almeida informed the President of the Province that the printed *Source of Truth or Path to Virtue* was the only textbook used in the classroom and that this was given to him by his predecessor President, Mr. Geminiano Joaquim Navarro Morais (10/1833-02/1835). The teacher emphasizes the prohibition of brochure and ensures that students no longer use the brochure at the opening classes.

<sup>13</sup> *Ibid.*, p. 209.

<sup>14</sup> Sergipe, *Letter sent to the President of Sergipe Province, Dr. Manoel Ribeiro da Silva Lisboa*, by the teacher Maria Diniz Rodrigues de Almeida, July 18<sup>th</sup>, 1835, APES E1, 644.

By applying the transmission circuit proposed by Darnton, it was possible to identify the characteristics of assimilation and dissemination of the *Source of Truth or Path to Virtue* brochure. The 19 mails now explored in this study favored the idea of absorption of the brochure, as well as dissemination in Sergipe province.

In the analyzed mails, it was possible to get some information, such as teacher's name, location where he/she taught classes, mail date and number of returned brochures. Thus, it is known that the brochure circulated in 16 places, among towns and villages, not counting the three mails that the source location is not quoted.

After equating, from the mails, the number of returned copies, it is concluded that in all, 92 brochures were delivered to the President of Province. It is known that each teacher received ten copies: «I have received and distributed 10 to my students». Therefore, the brochure circulated around most of the province among villages, settlements and parishes.

In 1835 the Sergipe Province had in its political and administrative structure fourteen villages: Itabaiana, Lagarto, Santa Luzia, Santo Amaro das Brotas, Vila Nova, Tomar do Geru, Propriá, Estância, Laranjeiras, Capela, Maruim, Nossa Senhora do Socorro, Campos do Rio Real and Itabaianinha<sup>15</sup>. The other areas mentioned in the mails were characterized as parishes or settlements, such as Simão Dias, Campo do Brito, Divina Pastora, Itaporanga and Bom Jesus.

In these mails, teachers mention the prohibition of the use of the brochure. This prohibition was made through official communication addressed to all public school teachers of first letters. The typology of this statement is undefined; it is not made clear whether it is a law, an official document or a letter. According to Martinheira<sup>16</sup> the typological nature of the nineteenth century documents varied due to several factors, because depending on the authority that mailed the document there was a structure or division. It also depended on what the document was for, who was responsible for it and on its circumstances.

As for this statement, it is an official document for fifteen teachers, two say it is a law and 02 do not mention the nature of the document. Analyzing the release, one realizes that it has: a) a narrative composed by exposure of the arguments by which the brochure is being suspended; b) an invocation to God acclaiming the blessing; c) a final protocol, with place and date; d) ending signature; e) a closing composed by the document addressing: to «Mr. Public Teacher of the First Letters of this City».

The President of the Province used some arguments for the brochure suspension. He believed that catechism should teach the Christian doctrine, but makes use of perverse ideas, namely denies «the eternal origin of God, implies the atheism, and despises the revelation». In addition, the President

<sup>15</sup> M.T. Nunes, *Sergipe Provincial I: 1820-1840*, Rio de Janeiro, Tempo Brasileiro, 2000, p. 25.

<sup>16</sup> J.J. Sintra Martinheira, *Types of cocments in the Central Administration in the Old Regime*, monography of a Graduation Major in Files and Documentation, Lisboa, Torre do Tombo, 1997, p. 11.

argues that the brochures «[...] tend to erase all religious belief from their hearts, spreading at the same time the lessons of this *spinosismo* to inspire untrue moral opinions»<sup>17</sup>.

Highlighted in this release of the fragment to the notion that the lessons contained in the catechism had characteristics of Espinosa<sup>18</sup> philosophical teachings, where it feeds the false moral and erases religious beliefs from the hearts. As for the *spinosismo* expression, it is worth considering that: «During the seventeenth, eighteenth and nineteenth centuries, Espinosa was the one who should not be mentioned or the one who should be attacked, even if his work had not been read «Spinozism» and «Spinozian» became blaming words»<sup>19</sup>.

Pictures 1 and 2 show the original statement where the express order not to use the brochures in classes of first letters came from.

Some teachers ratify the idea that the brochure had subversive content. In one of the mails, Teacher Francisco de Paula Machado, cautiously answered what is officially determined to him on June 16<sup>th</sup>, 1835. He claims «that if such brochure is established in so harmful principles, then it may disturb the religious ideas that I carefully seek to root in the hearts of my students». There are three important elements in this statement.

The first concerns the harmful principles present in the brochure. The teacher demonstrates that the idea that the brochure content is harmful comes from the President's official statement. The second element shows that the teacher, based on the received information, conveys the idea that there is a nefarious intent behind the brochure content that goes against the religious teachings he rooted in the hearts of students.

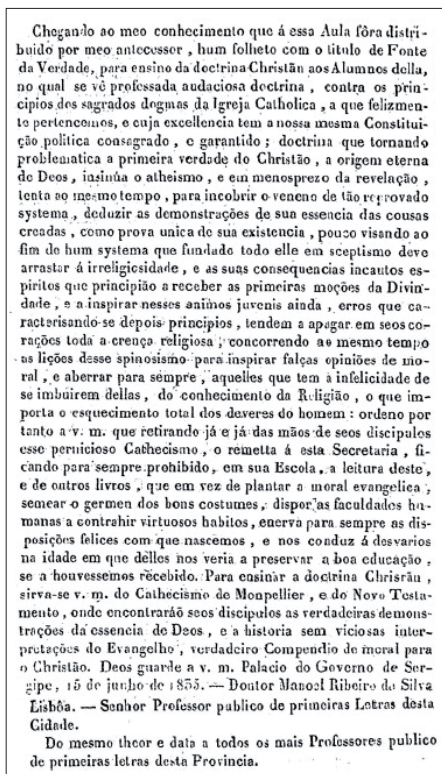
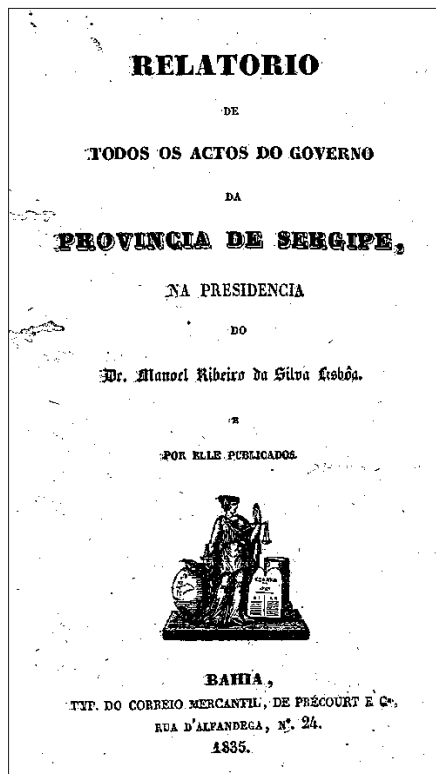
The third element benefits the analysis for the assimilation and dissemination of the *Source of Truth or Path to Virtue* brochure, because one of the teachers ensured that not only he had received copies, but that all classes of the Province did so. Thus, one can again confirm that there was circularity of the material and the ideas present in the brochure as well. Although such ideas had received severe criticism for not corresponding to Christian teachings, as it is shown in most of the analyzed mails.

It must be noted that there was, albeit moderately, the spread of the ideas contained in the brochure, as well as the use of the printed material, as it is shown by the primary teacher:

<sup>17</sup> Sergipe, *Report of the President Manoel Ribeiro da Silva Lisboa (message prohibiting the brochure Source of Truth or Path to Virtue, Sergipe, 15 de Junho de 1835*, available at: Latin-American Microform Project (LAMP)/Center for Reserch Libraries (CRL), <<http://brazil.crl.edu/bsd/bsd/u1188/000002.html>> (last accessed: March, 3<sup>rd</sup>, 2014).

<sup>18</sup> Dutch philosopher (1632-1677) who had been excommunicated by the Jewish community in Amsterdam. He wrote the theological-political Treaty in 1670, which led to his conviction by the rabbis and Christians. The philosopher has a set of theses, among them the idea «that God and Nature are the same thing – Deus sive Natura ('God, or Nature')».

<sup>19</sup> M. Chauí, *Espinosa: a phylosophy of freedom*, São Paulo, Moderna, 2005, p. 11.



Pic. 1. (left) Province of Sergipe Report Cover/ Year 1835. Source: Latin-American Microform Project (LAMP) / Center for Research Libraries(CRL) <<http://brazil.crl.edu/bsd/bsd/u1188/000002.html>>. Pic. 2. (right) Prohibition Letter to the use of the Source of Truth or Path to Virtue brochure. Sergipe, July 15, 1835. Source: Latin-American Microform Project (LAMP) / Center for Reserch Libraries (CRL) <<http://brazil.crl.edu/bsd/bsd/u1188/000070.html>>.

I send to Your Excellency, 7 copies, entitled = *Source of Truth or Path to Virtue* = out of ten that your predecessor sent to this class for the daily lessons of the students who would attend them; having been torn 3, due to the lessons daily use<sup>20</sup>.

It is known that the brochure had been adopted in order to teach the Christian doctrine in schools of first letters, but the brochure content goes beyond religious indoctrination. The brochure also has a moral and social content, with concepts of virtue, conscience, passion, addiction, justice, prudence, courage,

<sup>20</sup> Sergipe, *Letter sent to the Government Secretary of Sergipe Province, Brás Diniz de Villas-Boas, by Teacher Simeão Esteves. Villa Santa Lusía, July 6, 1835, APES E1, 644.*

lies, hypocrisy, freedom, friendship, rights and duties. It is evidenced that the content deals with education, with definitions about studying and its importance to avoid ignorance, as well as the obligations of the masters to the disciples.

## 2. *A glance at the Source of Truth or Path To Virtue brochure through the perspective of education*

José Antônio da Silva Teixeira authors the Source of Truth or Path to Virtue brochure. The author opened the brochure guaranteeing that this would be «useful for the boys to study at school, but also for adults who, recognizing the usefulness and purity of the ideas that surround this book will contribute, in practice, to narrow social links»<sup>21</sup>.

Composed of 22 pages, the brochure was located in the Old Catalogue of the National Library-RJ, it has catechism characteristics, with questions and answers. Altogether, there are 50 questions accompanied by their answers. With «small format (including the volume below 25 centimeters)»<sup>22</sup>, the brochure has the following dimensions: height of 14.5 cm and a length of 9.5 cm.

The booklet is Portuguese and was published in Porto by Typographia Commercial Portuense. There is still no indication of who, effectively, was the author of the brochure, we know only the name, but no other information or evidence is within reach. It should be highlighted that, like France, England and Germany, «Portugal also met an important development of book production, world widely spread, in the eighteenth and nineteenth centuries. Given its condition of colonial power, Portugal spread books to their possessions in America, Africa and Asia»<sup>23</sup>.

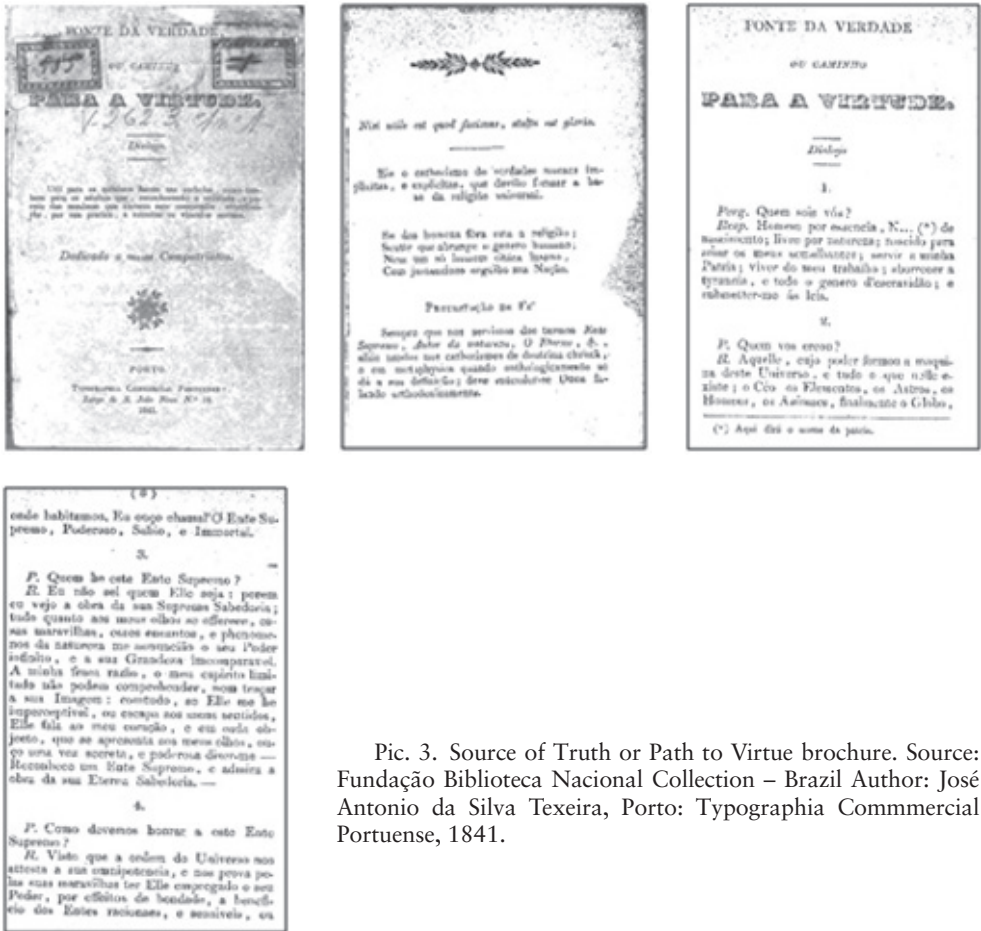
The issue used in this study was published 1841, but as the mails from the primary teachers date back to 1835, it is concluded that several editions of this brochure were published. The fact of not having access to the publication of 1835 imposed no impossibility or limit to the analysis, as the President of the Province in the official statement reinforces that when catechism speaks of God is «to deduce the demonstrations of His essence of the created things as the only proof of His existence»<sup>24</sup>. Surely, number 3 question and response reaffirms this statement of the President, because when conceptualizing God, the author says:

<sup>21</sup> da Silva Teixeira, *Source of Truth or Path to Virtue*, cit., p. 1.

<sup>22</sup> W. Martins, *The written word: The History of Books, Press and Library*, São Paulo, Ática, 2001, p. 120.

<sup>23</sup> M. Abreu, *The paths of books*, Campinas, ALB/Mercado de Letras, 2003, p. 21.

<sup>24</sup> Sergipe, *Report of the President Manoel Ribeiro da Silva Lisboa (message prohibiting the brochure)* Source of Truth or Path to Virtue, *Sergipe, 15 de Junho de 1835*, cit.



Pic. 3. Source of Truth or Path to Virtue brochure. Source: Fundação Biblioteca Nacional Collection – Brazil Author: José Antonio da Silva Texeira, Porto: Typographia Commercial Portuense, 1841.

I do not know who He is, however I see the work of His Supreme Wisdom; all that to my eyes is offered, these wonders, these charms, and natural phenomena urge me of His infinite power, and His incomparable greatness<sup>25</sup>.

Crossing this quote from the 1841 issue with the President’s statement in the 1835 suspension of use bulletin, it is concluded that there was no change in the brochure’s content over the years and the new editions. The same cannot be said with respect to the graphic particularities of the booklet, because it could incur in a nonsense.

Emphasizing that the book will serve to sharpen social ties experienced by readers, the author refers to the contents present in the brochure as previously

<sup>25</sup> da Silva Texeira, *Source of Truth or Path to Virtue*, cit., p. 6.

mentioned. Among these contents, education stands out. This issue goes beyond the catechetical themes present in the catechisms of the time that «acted as guides for those who taught the apprentices the prayers and the main elements of doctrine, in the form of alternate questions and answers»<sup>26</sup>. The content of education is of paramount importance to develop social connections, at the same time that it is necessary for the development of youth. The first approach on educational refers to studying:

What is studying for? Studying instructs the youth; beautifies old age; comforts sadness; urges happiness; perfects reason; saves us from the darkness of ignorance; from the yoke of slavery, and errors; shows us the light and leads us to the truth<sup>27</sup>.

The author lists the utilities of study in an integral perspective, making studying required for youth and old age, favoring the mood, and improving the intellect as to free the individual from blindness and leading him to the truth of things. Therefore, studying is to happiness, just as it is to the truth. From studying it is possible to acquire skills to deal with sadness, with ignorance, slavery, from the mistakes, finally the educational process favors the search for truth. For the author, the absence of studying generates ignorance.

All of Earth's evils have been baleful work of vile ignorance; it has produced oblivion, and total abandonment of our rights; it has propagated fanaticism, and slavery; it has finally degraded nature, and desecrated its laws<sup>28</sup>.

It is in the field of excessive ignorance that oblivion is born, mainly, according to the author of the booklet, forgetting the rights. Ignorance leads to obstinacy and consequently slavery damaging freedom and truth, so it is necessary while studying, the presence of the teacher or master.

The second approach to education in the *Source of Truth or Path to Virtue* brochure concerns the presence of masters and their duties to their disciples. These shall:

Show their duties with suavely docility; form in their tender hearts new virtue temples; inspire them the truth; moderate the empire of their teaching through a sweet friendship; and adjust their lessons, the good examples; the most powerful weapon, instructive and convincing<sup>29</sup>.

For the author, it would be up to masters teaching the duties of their disciples with docility, and prepare them in the light of virtues, using the truth, without using the teaching authority to drive them away, on the contrary, approach

<sup>26</sup> L.E. Oliveira, L. Pires Corrêa, *The importance of catechism in the schooling process*, «Interdisciplinary Journal», vol. 2, n. 2, 2006, p. 40.

<sup>27</sup> da Silva Teixeira, *Source of Truth or Path to Virtue*, cit., p. 21.

<sup>28</sup> *Ibid.*

<sup>29</sup> *Ibid.*, p. 23.

them through friendship. We highlight in this orientation the examples to be given by the masters, these should have a consistent life, thus better convincing their disciples.

The issues related to the printed subject of education evoke the importance of studying and to the obligations of teachers with their students. Although it is not known how to measure the extent to which these teachings have been read, discussed and experienced in classes of first letters of Sergipe Province, it is noted that the brochure was used.

Teacher Maria Diniz Rodrigues de Almeida addressing the President of the Province giving him the answer on the *Source of Truth or Path to Virtue* brochure stresses that she used it in the “opening” classes. It is noticed that, in a way, the brochure was used, as well as the catechisms were used in classes as a «teaching-learning method, whereby religious training and language teaching crisscrossed. This, in particular, focused on literacy as support to the establishment and spread of the Christian faith»<sup>30</sup>.

Therefore, if the printed material cited in this study was characterized as a catechism, it can be stated that the brochure served as reading and writing learning, as well as doctrinal elements, the latter being the reason why the President of the Province suspended its use and made primary teachers return all copies to the administration. Despite the printed material possessed formative order contents, such as questions related to studying and duties of teachers, the President banned the use. There is no elaborate assumptions about the possibility of the administrator having access to this content, which is evident from the mails and official statement is that the main motivation was of doctrinal and religious nature.

### *Final considerations*

In the sources here analyzed, it was possible to make a triangulation of data from the mails issued by primary school teachers to the administrator of the province, from the *Source of Truth or Path to Virtue* brochure and the report of President Manuel Ribeiro da Silva Lisboa, dated 1835, which brought the statement of the brochure suspension. This triangulation of data allowed an analysis and description of the aspects of primary education in the Sergipe Province through 1833-1835 mediated by educational legislation of the time.

It is considered that the adoption of the brochure was motivated by imperial law that stated teaching the principles of Christian morality and doctrine of the Catholic and Apostolic Roman religion in classes of first letters. However this adoption was suspended in view of the brochure content, which according to

<sup>30</sup> Oliveira, Pires Corrêa, *The importance of catechism in the schooling process*, cit., p. 40.



the president who banned it, it had untruths about Christian doctrine, as it denied the eternal origin of God.

For Nunes<sup>31</sup>, the attitude of President Manuel Ribeiro da Silva Lisboa to ban the use of the *Source of Truth or Path to Virtue* brochure was a position contrary to the liberal spirit that was orienting teachers of the time, because the strong moral and religious speech as a requirement in the school curriculum had to minimize other knowledge and undermine the learning process.

This prerogative has consistent elements because the printed material here quoted has not only spiritual content, but also social concepts, propositions related to the freedom and the rights and duties related to family and teachers, besides equipping teachers for the literacy process of their students.

Thus, the banning of this brochure by the President of the Province resulted in an interruption in the learning process of writing and reading. After the brochures had been collected, there was no replacement by another of didactic nature and comprehensive content, which are necessary for the creation of social links.

<sup>31</sup> M.T. Nunes, *History of Education in Sergipe*, São Cristóvão, Editora UFS, 2008, p. 61.



# Assistance and education of mutilated soldiers of World War I. The Italian case\*

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**ABSTRACT:** During the Great World and in the post war years, the Pious Institute for rickets sufferers of Milan, directed by the famous orthopaedist Riccardo Galeazzi, was a leading hospital which also had an educational vocation towards crippled children. The Industrial School for mutilated soldiers, which opened in 1915, became a national model, too. Besides, Galeazzi set up a National Prosthesis Workshop for soldier amputees. He had already developed a theory about cripples' education that stressed the importance of labour. Galeazzi thought private and public charity was not the solution, but labour was. Galeazzi knew French and English orthopaedists, such as Robert Jones, but was especially influenced by Konrad Biesalski's work and Hans Würtz's *Krüppelpädagogik*. For him, though, working did not simply coincide with earning a living, it was the sheer fact of working, and the effort that it implied, that gave back human dignity. Galeazzi clearly said it was not a question of the economic value of men, but a moral question that a civilized State could not refuse to face. Hence assistance and welfare to mutilated soldiers were a duty (and he was deeply involved in these areas), but they were not enough. Every invalid had to be able to work again, even if with a little salary. Having a pension should not prevent them working. Rehabilitation meant both physical and vocational training. The paper highlights Galeazzi's work in the framework of the Italian case (welfare, education and propaganda for mutilated soldiers).

**EET/TEE KEYWORDS:** First World War; Mutilated soldiers; Disabled veterans care; War propaganda; Special education; Italy; XX<sup>th</sup> Century.

\* This paper has been prepared and discussed by both authors, but S. Polenghi is responsible for parr. 1, 2, 3 and the conclusions and A. Debè for par. 4 and the introduction.

## *Introduction*

The devastating experience of the Great war was a crucial moment in the history of both orthopaedic and special education. There were great progresses in surgery and in the techniques of amputation, as well as in the research about prostheses. More lives were saved, but a huge numbers of young adults ended up permanently disabled, so that nations had to face the great difficulty of integrating them back into society. Assistance to mutilated soldiers and their inclusion in society as working men, rather than invalids, became mandatory in Italy in 1915, as in other States that had already joined the conflict. War disabled had to be persuaded they could and should be active again, and appeals were made to the uninjured to help them with donations, but it soon became evident the State had to intervene by granting a job or a pension. The Institute for rickets sufferers of Milan, directed by the famous orthopaedist Riccardo Galeazzi, was foremost in Italy and abroad in surgical and in educational care, together with the Rizzoli Hospital of Bologna, directed by Vincenzo Putti. The paper highlights Galeazzi's leading work in Italian care and welfare for soldiers amputees, also pointing out how the maimed veterans were depicted in the nationalistic propaganda and how that corresponded to Galeazzi's conception of the maimed ex-servicemen.

### *1. Milan's Institute for rickets sufferers and Galeazzi's work*

The more advanced orthopaedic centres in Italy were in Milan, Bologna, and Turin. Turin's Institute was the first founded in Italy, in 1872, as a Special school for rachitic children, just like Milan's Pious Institute for rickets sufferers (*Pio Istituto dei rachitici*, now the Orthopaedic Hospital *Istituto Ortopedico Gaetano Pini*), which was set up in 1874 by the free-mason doctor Gaetano Pini thanks to donations. These two schools in a few decades became hospitals, whereas the Rizzoli was founded as a hospital in 1896 in Bologna. After Pini's death, in 1887, Milan's Institute was directed by the orthopaedic surgeon Pietro Panzeri, who was appointed director of Rizzoli Hospital as well. In 1884 Panzeri had obtained the lectureship (*libera docenza*) of orthopaedics in the University of Pavia – the very first chair of orthopaedics in Italy. After Panzeri's death, Riccardo Galeazzi, born in 1866, already a lecturer in surgery in Turin, was appointed director of Milan Institute. In 1906 the Institute became an orthopaedic clinic. In 1911 Galeazzi became full professor of orthopaedics. Under his guidance, the Institute grew enormously, with new wards and operating theatres, but retaining its original educational vocation: little rachitic children were still cured and educated, but Galeazzi also opened in 1908 the Industrial Home and School for lame, mutilated and paralytic children (*Scuola*

*di lavoro* “Sofia Carmine Speroni”, per fanciulli storpi, mutilati e paralitici), an elementary and vocational school where young mutilated received artificial limbs, which was the first and for a long time the only one in Italy. Since his arrival Galeazzi had in fact opened a little workshop for prosthesis making inside the Institute. Thanks to an agreement with the City Council, the Institute provided artificial limbs and orthopaedic aids for all the mutilated and poor cripples of Milan and surrounding areas. The Pious Institute became a leading prosthesis centre, together with the Rizzoli Institute<sup>1</sup>. Galeazzi was particularly attentive to kinetic prostheses. He was a man of culture, who had a very up-to-date knowledge of the orthopaedic world, who read the main foreign literature and attended international congresses. He particularly admired Konrad Biesalski and his battle for cripples’ rights and often echoed Hans Würtz’s *Krüppelpädagogik*<sup>2</sup>. The Institute and his director rapidly acquired an international fame. In 1910 the Milanese Institute received the Grand Prix at the International Exhibition of Buenos Aires.

For Galeazzi, like for Biesalski, the key to cripples’ redemption was work, but he did not limit the meaning of work to the economic aspect, which Biesalski stressed. In fact, the worst affected cripples could not reach economic independence by their work and needed life-long assistance. Nonetheless, Galeazzi thought work was the means of giving them some dignity. By working (not necessarily by earning enough to be independent) a disabled person proved his own dignity: it was not the final product of labour that counted, it was the sheer act of working, and the effort it implied, that gave back human dignity. He clearly said it was not a question of the economic value of men, but a moral question that a civilized State could not refuse to face: «even if little or none were the product of the [cripple’s] work», it would be nonetheless worthwhile and just to teach and provide them with an occupation, for that gives them «the moral satisfaction, which derives from having completed something useful. Consequently, from this point of view the question whether the economic value

<sup>1</sup> S. Polenghi, *Gaetano Pini e l’Istituto dei Rachitici di Milano*, «Archivio storico lombardo», 2005-06, pp. 265-305; Ead., *Raddrizzare gli arti, rieducare i mutilati. L’ortopedia di Riccardo Galeazzi all’Istituto dei Rachitici*, in E. Canadelli, P. Zocchi (edd.), *Milano scientifica 1875-1924*, 2 voll., Milano, Sironi, 2008, pp. 217-35; Ead., *Educating the cripples. The Pious Institute for rickets sufferers of Milan and its transformations (1874-1937)*, Macerata, eum, 2009; Ead., *Die Erziehung der Krüppelkinder in Italien zwischen Medizin und Pädagogik. Die Krüppelanstalt von Mailand: vom Positivismus bis zum Faschismus (1874-1937)*, in A. Nóbik, B. Pukánszky (edd.), *Normalitaet, Abnormalitaet und Devianz. Gesellschaftliche Konstruktionsprozesse und ihre Umwälzungen in der Moderne*, Frankfurt a.M., Peter Lang, 2010, pp. 223-33.

<sup>2</sup> P. Fuchs, “Körperbehinderte” zwischen Selbstaufgabe und Emanzipation: Selbsthilfe-Integration-Aussonderung, Neuwied-Berlin, Luchterhand, 2001, pp. 20-65; H. Stadler, *Überkonfessionelle und staatliche Krüppelfürsorge*, in H. Stadler, U. Wilken, *Pädagogik bei Körperbehinderung*, Weinheim u.a., Beltz, 2004, pp. 194-248; O. Musenberg, *Der Körperbehindertenpädagoge Hans Würtz (1875-1958). Eine kritische Würdigung des psychologischen und pädagogischen Konzepts vor dem Hintergrund seiner Biographie*, Hamburg, Kovač, 2002.

of the cripples' product compensates society for the expenditures it has to face to support them, is of secondary importance»<sup>3</sup>. He highlighted this conception when he opened his Industrial Home and School for lame, crippled and paralytic children, but this idea would be relevant also for soldier amputees.

## 2. Galeazzi's work for the mutilated soldiers

Italy joined the conflict on May 24 1915. Galeazzi, who was a fervent patriot, volunteered as medical colonel, thus getting the officer status that would make it easier for him to deal with the army authorities. Between April and June 1915 he obtained permission from the Board of the Institute to transfer the *Casa di lavoro Ottolenghi*, in Gorla, originally planned for civil invalids, to military sanitary authority<sup>4</sup>. Gorla was a little municipality in the Northern area out of Milan (annexed to Milan in 1923), and the *Casa di lavoro Ottolenghi* was a villa with a vast garden, donated to the Pious Institute by Countess Fanny Finzi Ottolenghi, a wealthy philanthropist. Galeazzi accepted the directorship, with no salary, of the *Casa di lavoro Ottolenghi*, which was turned into a Retraining School for war disabled, also called the Finzi Ottolenghi Refuge. Thanks to an agreement with the Ministry of war, a nearby Military Orthopaedic hospital was quickly opened, on September 18 1915. Soldier amputees came in the Military Orthopaedic hospital after having been operated on in other hospitals. Their stumps were seen to and the artificial limbs were fitted. When the physical treatment was completed, the patient started occupational retraining in the nearby Ottolenghi Refuge.

Galeazzi's activity in favour of disabled veterans was tireless and his ideas were ahead of his time<sup>5</sup>. In 1915 he started holding conferences on the matter, in Milan and in other cities. He wrote a booklet, which was widely read, and in 1916 wrote other articles, reprinted as pamphlets, on the rehabilitation of maimed veterans<sup>6</sup>. His model of assistance was the German one, and Biesalski

<sup>3</sup> R. Galeazzi, *Relazione*, in *L'inaugurazione della scuola di Lavoro "Sofia Carmine Speroni" maggio 1913*, Biella, Amosso, 1913, p. 8.

<sup>4</sup> Archives of the Orthopaedic Hospital Gaetano Pini, *Minutes of the Board 1913-1915*, 23 Apr., 5 Jun. 1915.

<sup>5</sup> B. Bracco, *La patria ferita. I corpi dei soldati italiani e la Grande Guerra*, Firenze, Giunti, 2012, p. 86 points out the role of Galeazzi and his foresight in the issues concerning rehabilitation of war mutilated, their dignity and economic efficiency. See also pp. 86-96.

<sup>6</sup> R. Galeazzi, *Le moderne provvidenze sociali per i mutilati in guerra*, Milano, Rava & C., 1915; Id., *La rieducazione professionale dei lavoratori mutilati in guerra: relazione al Comitato lombardo per i soldati mutilati in guerra*, Biella, Amosso [1916]; Id., *L'Italia provvede ai suoi figli mutilati in guerra*, Milano, Tip. del Corriere della sera, 1916; Id., *Come si rieducano i soldati mutilati*, Firenze, Bemporad, 1916. These booklets were originally articles. As booklets they gained a wider diffusion. Galeazzi's speech at the Lombard Society of medical and biological

remained his landmark, in spite of the fact that Germany was an enemy. Galeazzi, in fact, stressed that even before the war Germany could boast 54 Industrial Schools for the cripples, with 221 workshops for 51 different jobs. Six months after the outbreak of the war, the number of these Schools had already rose to 138. The Industrial School for crippled boys of Munich (*Königliche Zentralanstalt für Erziehung und Bildung krüppelhafte Kinder*) was the constant model<sup>7</sup>. Galeazzi already knew the German situation well, but could not visit the enemy country in 1915. Instead, he went to France and visited various Institutes and Retraining Schools. He considered the *Institut Militaire Belge de Rééducation Professionnelle* of Port-Villez as the best, for its scientific character<sup>8</sup>. Indeed in Port-Villez Institute limbless Belgian veterans underwent a medical, pedagogical and technical examination, to establish their inclination, strength, and capacities<sup>9</sup>. He thought England and Russia had good model of welfare nets, which could be turned into centres for maimed veterans. He noticed that in France, where war disabled were free to decide whether to join a programme of work rehabilitation or not, only 10% of them entered in the Retraining Schools: hence he thought this had to be made compulsory. Also Sir Robert Jones, whose work for mutilated British soldiers was immense, thought discharging disabled veterans into civil life without rehabilitation was wrong<sup>10</sup>. Actually, the Italian law of 1917 on invalid ex-servicemen prescribed only 15 days of compulsory stay in a School of re-education, and that only for indigent soldiers<sup>11</sup>. The official results confirmed Galeazzi's view: the disabled

sciences, held on January 15 1915 in «Archivio di ortopedia», vol. XXXIII, 1916, attachment n. A. Galeazzi's report on *Professional re-education of war mutilated workers*, that he read at the Lombard Board for maimed soldiers, on October 24 1915, is attachment n. L.

<sup>7</sup> Galeazzi, *Come si rieducano i soldati mutilati*, cit., pp. 4-5. H. Stadler, *Die Unterrichts- und Beschäftigungsanstalt für krüppelhafte Kinder des Edlen von Kurz in München*, in Stadler, Wilken, *Pädagogik bei Körperbehinderung*, cit., pp. 46-81.

<sup>8</sup> Galeazzi, *La rieducazione professionale dei lavoratori mutilati in guerra*, cit., p. XCIX. On French occupational retraining centers G. Chevalley, *Le scuole di rieducazione professionale dei mutilati e dei feriti in guerra in Francia*, Torino, Tip. Artigianelli, 1915, who pointed out how articulated artificial limbs were not yet suitable for manual tasks, so much that many mutilated preferred to get rid of them when working, p. 11.

<sup>9</sup> On Port-Villez Institute see P. Verstraete, *Disability, Rehabilitation and the Great War: Making Space for Silence in the History of Education*, in P. Smeyers, M. Depaepe, E. Keiner (edd.), *Educational Research: The Importance and Effects of Institutional Spaces*, Dordrecht, Springer, 2013, pp. 95-113.

<sup>10</sup> D. LeVay, *The History of Orthopaedics. An account of the study and practice of orthopaedics from the earliest times to the modern era*, Camforth, Parthenon, 1990, p. 140. On Jones and his Shepard's Bush Military Hospital in London, Britain's model orthopaedic centre, established in 1916 see R. Cooter, *Surgery and Society in Peace and War: Orthopaedics and the Origin of Modern Medicine 1880-1940*, London, Macmillan, 1993, pp. 113-30; J.S. Reznick, *Healing the Nation. Soldiers and the culture of Caregiving in Britain during the Great War*, Manchester [u.a.], Manchester University Press, 2004, pp. 116-36.

<sup>11</sup> G. Chevalley, *Technical Re-education in Italy*, in *Inter-allied Conference on the after-care of disabled men, Second annual meeting*, London, His Majesty Stationery Office, 1918, p. 155.

that had undergone re-education managed more easily to find a place in society, whereas those who had rejected that period tended to become passive<sup>12</sup>.

The Ottolenghi Retraining School rehabilitated circa 500 men every year – more than 2,500 men in the war years<sup>13</sup>. War amputees had to stay until declared ready to go back to their families, when, at the end of a training period, they were able to cope with their prostheses. The School had 100 beds and was controlled by the Board of the Pious Institute for rickets sufferers. The discipline inside the Refuge was military, with medical officers, but there were nuns and civil personnel. The Minister of War, the Milanese Committee for war needs and the Lombard Committee for the mutilated financially supported the Ottolenghi Retraining School<sup>14</sup>.

In the Ottolenghi Refuge Galeazzi set up an experimental laboratory, where the individual work and resistance coefficients of every mutilated soldier were empirically studied and ameliorated, thanks to a rational training of the mutilated or weakened limb. Special training was provided for those who had lost their right arm and had to become left-handed. Eventually the veteran was trained to work with the artificial limb and began a vocational training<sup>15</sup>. The loss of lower limbs was less terrible than the amputation of arms: leg prostheses were rather good and enabled the amputees to walk and climb stairs, whereas it was not possible to reproduce the complex functions of the hands<sup>16</sup>. In 1919 it was calculated that 12,289 Italians had lost upper limbs and 19,347 had suffered leg amputation<sup>17</sup>.

Galeazzi kept working at kinetic and functional prostheses for labour, and tried to reduce the functional deficiency<sup>18</sup>. The Orthopaedic workshop produced new prostheses for upper and lower limbs, also improving Vanghetti kinematic hand (Giuliano Vanghetti had constructed in 1898 an artificial limb that moved with muscle contraction).

<sup>12</sup> *Ibid.*, p. 158.

<sup>13</sup> R. Galeazzi, *Curriculum vitae*, 1933, in Centro Apice – Historical archives of the University of Milan, Archivio proprio, Ufficio personale, Fascicoli del personale cessato, fasc. 1408.

<sup>14</sup> See G. Giachi, *Milano per i lavoratori mutilati in guerra*, speech at the Lombard Society of medical and biological sciences, held on January 15 1915, «Archivio di ortopedia», vol. XXXIII, 1916, pp. III-CXIII.

<sup>15</sup> Galeazzi, *L'Italia provvede ai suoi figli mutilati in guerra*, cit., p. 8.

<sup>16</sup> *Id.*, *Come si rieducano i soldati mutilati*, cit., p. 13. The number of leg amputations was higher than the number of arm amputation, probably because of frostbite, Bracco, *La patria ferita*, cit., p. 92.

<sup>17</sup> A. Lancellotti, *La Terza Conferenza Interalleata per lo studio delle questioni inerenti gli invalidi di guerra*, «Bollettino della federazione Nazionale dei Comitati di assistenza ai militari ciechi, storpi e mutilati», Oct. 30, 1919, p. 265. The number of war-crippled (not amputated) was higher: leg-crippled reached 30,304 units, arm-crippled 44,316. *Ibid.*, p. 266.

<sup>18</sup> See his reports, with the list of newly devised artificial limbs: R. Galeazzi, *Mechanical Prothesis for Manual Work*, in *Inter-allied Conference on the after care of disabled men*, cit., pp. 493-515, and *Exact Constructive Drawings of the Prothesis and Orthopaedic Apparatus for the Lower Limbs*, in *Inter-allied Conference on the after care of disabled men*, cit., pp. 516-519.



In 1916 the Orthopaedic workshop of the Pious Institute could not cope with the increasing number of requests for prostheses. Utterly appalled by the danger of speculation on prostheses, and knowing the price of them was higher in Italy than in other countries, since an industrial production did not exist, Galeazzi gained the funds (60,000 lire) from private citizens, and particularly from banks and from the City Council, for the opening in Gorla of the National Prosthesis Workshop for mutilated soldiers, which was recognized by Royal Decree on February 24 1916<sup>19</sup>. This National Workshop had an industrial and scientific character and was put under the supervision of orthopaedists. It occupied a big area of 2,200 square meters and produced leather, wood, and fibre aids. In war time it employed 200 workmen and was the leading Italian Prosthesis Workshop<sup>20</sup>. Artificial arms with special fittings to match industrial machinery were here produced, too.

In the Ottolenghi School the illiterate were taught to read and write. When possible, the veterans were trained to go back to their previous job, but that was rarely the case. Another job was suggested in accordance with their residual capacities and the results of the above-mentioned experimental laboratory. Vocational teachers and officers helped the veterans to find the job and the training most suitable for them<sup>21</sup>. There were four barracks with workshops for carpenters, tailors, clog and shoemakers, wicker basket makers, leather workers, sculptors in wood, saddlers. Also farmers were taught how to work with an artificial limb (the majority of soldiers were peasants: 60% of the amputees in Galeazzi's experience, but 85% of disabled veterans according to official statistics of 1918<sup>22</sup>). The more cultivated invalids learned other skills, in order to get a job in a Post office or in other State or private offices. This more advanced intellectual teaching was carried on in the Institute of the Marcelline nuns. There was practical training in firms, too. Others followed lessons of art in the Academy of fine arts of Brera<sup>23</sup>.

Galeazzi explained that normally six months were enough to complete the rehabilitation, which was carried on, as for young cripples, through the "regenerating" power of work (in fact in other Italian Retraining Schools a year was the average period)<sup>24</sup>. He stressed the importance of a rapid intervention:

<sup>19</sup> *Officina nazionale di protesi per mutilati in guerra in Gorla*, Milano, Alfieri & Lacroix, 1917. See also A. Gibelli, *L'officina della Guerra. La Grande Guerra e le trasformazioni del mondo mentale*, Torino, Bollati Boringhieri, 1991, pp. 112-21; Bracco, *La patria ferita*, cit., pp. 115-25.

<sup>20</sup> Giachi, *Milano per i lavoratori mutilati in guerra*, and enclosed papers, cit., pp. III-CXIII.

<sup>21</sup> See R. Galeazzi, *L'Esposizione interalleata dei lavori degli invalidi di guerra (Gand, 14-22 aprile 1923) e la partecipazione italiana*, Roma, Tip. Garroni, 1923.

<sup>22</sup> Chevalley, *Technical Re-education in Italy*, cit., p. 145.

<sup>23</sup> State Archives of Milan, *Prefettura di Milano, Gabinetto*, Serie I, file. 371. See also *Agli invalidi della guerra*, ed. Opera nazionale per la protezione e l'assistenza degli invalidi della Guerra, Roma, Tip. Bardi, 1918.

<sup>24</sup> Galeazzi, *L'Italia provvede ai suoi figli mutilati in guerra*, cit., pp. 9-11; Id., *La rieducazione professionale dei lavoratori mutilati in guerra*, cit., p. 26.

straight after the mutilation, in fact, depression attacked the amputee. It was mandatory to fight it, which was possible by living together with other mutilated soldiers, whose success was visible. Hence permanence in hospitals had to be reduced to the minimum, then maimed soldiers had to be compulsory shifted to Industrial Schools, where the best teachers were veterans. Through work and thanks to the example of other veterans, it would be possible to overcome the horror of the mutilation. Sharing the same sorrow and efforts would make the maimed soldiers brothers in a deep sense: the Retraining School was «a truly human school, because it respects the principle of social equality, that brings close the weak and the strong in a brotherly harmony [...] with the active cooperation of millions of citizens»<sup>25</sup>.

Galeazzi advocated military discipline in the Retraining Schools, but he also insisted on the necessity of opening many Schools, in order to let the mutilated be as near their families as possible. He thought it would be desirable to reintegrate them in the working society, and to let them stay with healthy people, whose gratitude would be a moral comfort. They also had to be free to leave the School to go to the cinema and to have some entertainment. The amputated had to be seen: no shame or pity for them, but pride<sup>26</sup>. It is worth remembering that this attitude was not so diffused in Europe, for others feared that the impact of the sight of a mutilated soldier – let alone a disfigured one – could produce revulsion towards the war rather than encouragement to join the army. There was no fear of defeatism in Galeazzi, an ardent patriot who kept insisting on the moral duty of society towards maimed soldiers. Indeed Italy followed this model in many Schools for Occupational Re-education, spread throughout the country, thanks to the involvement of citizens and local boards, institutions, local authorities and State financing. Galeazzi's system of "moral re-education" and his School, the very first to be scientifically organized in Italy, were presented as models for all Italy by the medical captain Giovanni Selvi in 1916<sup>27</sup>. Galeazzi also stressed the importance of a female presence in hospital in the figure of the nurse: women had a particularly developed sense of mercy that could effuse a sense of peace in highly distressed souls of men far from their families<sup>28</sup>.

As mentioned above, Galeazzi thought that work was necessary not only to give economic independence, but to restore human dignity. Indeed he asked immediately for mutilated veterans to be provided with an invalidity pension

<sup>25</sup> Galeazzi, *L'Italia provvede ai suoi figli mutilati in guerra*, cit., p. 11.

<sup>26</sup> Galeazzi, *La rieducazione professionale dei lavoratori mutilati in guerra*, cit., pp. CII-CV.

<sup>27</sup> G. Selvi, *Il problema dei mutilati ed invalidi di guerra e le attuali provvidenze statali*, Roma, Cassa Nazionale d'Assicurazione per gli infortuni degli operai sul lavoro, 1916, p. 5. To be seen for the pension system for disabled before the law of 1917.

<sup>28</sup> Galeazzi, *Come si rieducano i soldati mutilati*, cit., p. 13. On the role of support personnel, among whom nuns, see E.R. Mayhew (ed.), *Wounded: the long journey home from the Great War*, London, Vintage Books, 2014, on the role of women S. Kienitz, *Beschädigte Helden: Kriegsinvalidität und Körperbilder 1914-1923*, Paderborn, Ferdinand Schöningh Verlag, 2008, pp. 249-253.

as soon as possible, before the prosthesis was ready, and also to be provided with work training as well and given a job in State administration and offices. He often referred to his “*Sofia Carmine Speroni*”, Industrial Home and School for lame, mutilated and paralytic children as an example. Here the orthopaedist advised which kind of job young cripples could learn, on the basis both of the body’s capacities and problems and of the children’s character and psychology. As for those war invalids, whose conditions were so severe, that independent living was impossible, occupational retraining was nonetheless to be done. Even if they could not earn enough to live on, they had not to be deprived of work and its moral value, as Galeazzi had already argued for disabled civilians. All disabled had to be granted both a pension and the chance to work. Again, Galeazzi clearly saw the importance of assisting the mutilated veterans and of respecting them: they should not be reduced to the status of beggars or closed up in Homes and Almshouses. He advocated the State welfare, as well as social philanthropy: citizens too had to be involved. This position was near to the one put forward by Salvatore Galgano, professor of civil law in the University of Naples, who in 1919 stressed the importance of making the war disabled able to help themselves (with microcredit, cooperatives of mutilated, payment facilities for buying far or work tools, etc.). Not perpetual welfare for them, but rather “back to work” as a motto<sup>29</sup>. For Galeazzi and Galgano the State, civil society and the disabled themselves should cooperate. Deborah Cohen has shown how in England it was the civil philanthropy, not the State, that care for the invalid veterans, who remained loyal to the Nation, and how the Weimar republic vice versa established an efficient welfare system, but by rejecting private philanthropy and avoiding public expressions of gratitude made a gap between society and war disabled, who turned against the Weimar State<sup>30</sup>. The cooperation between State, philanthropy and war invalids purposed by Galeazzi and Galgano, which Italy partially realized, as we shall see in par. 3, managed to maintain an active social and political role to war invalids.

Compared with the views of other European leading colleagues, like Biesalski or Jones, Galeazzi’s idea of work as a powerful re-training tool was similar but not equal, since he kept insisting on the moral value of work, more than on economic impact (Jones, for instance, emphasized the orthopaedic and curative value of work aside the economic one, and identified wounded patients as wage-earners instead of helpless dependents; Biesalski insisted of making the maimed servicemen capable of being taxpayers)<sup>31</sup>.

<sup>29</sup> S. Galgano, *La protezione interalleata degli invalidi e dei mutilati di guerra e la legislazione internazionale del lavoro*, Roma, Nuova Antologia, 1919, p. 8.

<sup>30</sup> D. Cohen, *The War come Home. Disabled Veterans in Britain and Germany, 1914-1939*, Berkely [u.a.], California University Press, 2010, first ed. 2001, pp. 15-97.

<sup>31</sup> Reznick, *Healing the Nation*, cit., pp. 121-122. See also J.S. Reznick, *Work-Therapy and the Disabled English Soldier in Great Britain in the First World War: the case of Sheperd’s Bush Military Hospital*, London, in D.A. Gerber (ed.), *Disabled veterans in history*, Ann Arbor, Univ.

Galeazzi also set up the local Committee for the assistance of mutilated soldiers and was made responsible for the occupational retraining schools; he published many scientific works on artificial limbs, prostheses and rehabilitation and held many conferences with military physicians about artificial limbs and rehabilitation; he cooperated with Lavinia Mondolfo, who in Milan took care of the blind veterans and their occupational retraining and upheld their rights<sup>32</sup>. In 1916 the Prime minister appointed Galeazzi a member of the Royal Board which had to study assistance and re-education of mutilated, crippled and blinded soldiers. During the war, he was member of the executive board of the ONIG (National Institution for War Disabled)<sup>33</sup>. Galeazzi was also often heard as an expert in the special committee of the Chamber of Deputies in Rome. He was appointed in the editorial board of the *Revue Interalliee pour l'Etude des Questions Interessant les Mutilés de la Guerre* (1918-22), where also J. Galsworthy sat<sup>34</sup>. On February 19 1918 Galeazzi chaired the National Congress for assistance to mutilated soldiers, which asked the Government to employ disabled servicemen in State and local offices and in charity institutions by-passing the required competition<sup>35</sup>. His activity was crowned in the same year by the chairmanship of the IX Congress of the Italian Society of Orthopaedics, once again held in Milan.

After the war Galeazzi was appointed a member of the Inter-allied Conference on the after-care of disabled men: he took an active part in the conferences in Paris and London and in 1920 chaired the conferences in Lisbon, Rome and Brussels. In Paris he was finally hailed as honorary chairman<sup>36</sup>. In 1923 the prestigious American review *The Journal of Bone & Joint Surgery* named the Pious Institute in Milan as one the best of Europe, as well as Bologna's Rizzoli Hospital<sup>37</sup>.

In 1921 the Ottolenghi Refuge in Gorla, having ended its mission, ceased to function. In 1924 the *Casa di lavoro Ottolenghi* for civil invalids could be reactivated, as originally planned. The question of the war mutilated was now a social and political one – the surgical and rehabilitative urgency had ceased.

of Michigan Press, 2012, first ed. 2000, pp. 185-203.

<sup>32</sup> Italy was advanced in the re-education of blind veterans, with the Colosimo School of Naples and the School of Milan, directed by Lavinia Mondolfo.

<sup>33</sup> Unfortunately, the documents of the Milanese sections of ONIG 1917-1981 cannot be consulted by scholars, since all the 392 records were deposited in the State Archives of Milan in 1995 but no inventory has been provided yet: <<http://www.lombardiabeniculturali.it/archivi/complessi-archivistici/MIBA002C7A/>> (last accessed: August 13<sup>th</sup>, 2016).

<sup>34</sup> On Galsworthy's involvement for disabled soldiers see J.S. Reznick, *John Galsworthy and Disabled Soldiers of the Great War*, Manchester, Manchester University Press, 2009.

<sup>35</sup> State Archives of Milan, *Prefettura di Milano, Gabinetto*, Serie I, file 371.

<sup>36</sup> These and many other official appointments in Galeazzi, *Curriculum Vitae*, cit.

<sup>37</sup> A. Steindler, *A visit to some of the orthopaedic clinics of Europe*, «JB&JS (Journal of Bone & Joint Surgery)», vol. 5, 1923, pp. 127-34; H. Platt, *Orthopaedics in continental Europe. 1900-1950. The changing pattern*, «JB&JS», vol. 4, 1950, pp. 576-79, considered Galeazzi and especially Putti the two leading orthopaedists of the time and Milan and Bologna Institutes among the best in Europe and in the world. The same says LeVay, *The History of Orthopaedics*, cit., pp. 286-292.

### 3. Assistance to soldier amputees

In Italy local participation was high and committees for the assistance to the veterans spread everywhere in 1915-16, until on March 25 1917 the Law n. 481 unified them in the ONIG and on April 29 the disabled veterans themselves founded their own association (ANMIG, Associazione Nazionale Mutilati e Invalidi di Guerra) in Milan, which in 1918 counted 20,000 members, and soon after 30,000<sup>38</sup>. The 1917 Law gave the ONIG also the task of facilitating the reinsertion of disabled veterans into the world of work, but it was only with Law n. 1312 of 1920 August 21 that public services were compelled to employ war invalids<sup>39</sup>. The War had caused in Italy circa 450,000 invalids<sup>40</sup>. As late as 1956 the number of the First World War veterans receiving a pension (141, 433 including those injured in the war in Libya) was nearly half the number of Second World War ones (313, 632)<sup>41</sup>.

Aim of ANMIG was to support economic and social requests in favour of the war disabled, but also to help them to go back to work through rehabilitation programmes. ANMIG arose from the Milanese interventionist wing and, after the severe Italian defeat at Caporetto (*Karfreit*) in 1917, carried out a strong patriotic campaign. Mutilated veterans, guided by the leader of the Association, Carlo Delcroix, who had lost both his hands and his eyes, spoke to soldiers to encourage them to resist. Though the sight of maimed veterans did not actually prompt the military ardour of soldiers, the firm action of the ANMIG in supporting the government and the Nation helped reassure the mutilated and society in general about the sense of their sacrifice. Differently from England, in 1918 Italy commemorated its entrance into the war with celebrations in which many mutilated took part. ANMIG had overridden the socialist and pacifist associations of war mutilated and strongly fought to reassure the war disabled about the value of their sacrifice. Propaganda both during and after the war depicted the wounded body as the most dignified. Children were explained the

<sup>38</sup> M. Salvante, *Italian Disabled Veterans between Experience and Representation*, in S. McVeigh, N. Cooper (edd.), *Men After War*, London, Routledge, 2013, pp. 111-129; Bracco, *La patria ferita*, cit., pp. 111-114, 138-181. See also *Opera nazionale per la protezione ed assistenza degli invalidi della guerra. L'opera svolta in Italia: 1915-1919*, Roma, Tipografia dell'Unione Editrice, 1919.

<sup>39</sup> One every ten, if there was a competition, or 10-20% if there was no competition. G. Fumi, *Politiche del lavoro e portatori di handicap: il collocamento obbligatorio (1917-1968)*, in S. Zaninelli, M. Taccolini (edd.), *Il lavoro come fattore produttivo e come risorsa nella storia economica italiana*, Milano, Vita e Pensiero, 2002, pp. 73-77.

<sup>40</sup> The pensions granted for war invalidity at the end of the war were 451,645 according to Ministero della guerra, ufficio statistico, *La forza dell'esercito: statistica dello sforzo militare italiano nella guerra mondiale*, Roma, Provveditorato generale dello Stato, 1927, p. XIV; they rose to 463,000 according to *Il Decennale. X Anniversario della vittoria*, Associazione nazionale volontari di guerra ed., Firenze, Vallecchi, 1929, pp. 173-74.

<sup>41</sup> ONIG, *Quarant'anni di Assistenza agli invalidi di Guerra (1917-1957)*, Roma, 1957, p. 18.

nobility of being deprived of a limb and having sacrificed themselves for the Motherland both at school and in children's literature<sup>42</sup>.

Mussolini then used this argument and improved war pensions thus gaining support from the veterans<sup>43</sup>. In 1922 the ANMIG counted nearly half a million of members, spread in all Italy, so it had a political influence that Mussolini cunningly managed to use. Whereas in other European countries the honour paid to mutilated ex-servicemen tended to fade with the years, Fascism kept alive the memory of the sacrifice of Italian soldiers, who gave their lives or part of their bodies to the mother country<sup>44</sup>. In 1924 Delcroix, president of ANMIG, was elected member of the Chamber of Deputies and was reelected in the following two legislatures. He backed Mussolini until the Second World War, when he did not approve of the alliance with Germany<sup>45</sup>.

#### 4. Maimed soldiers in the propaganda

The enormous number of war invalids in Europe meant that cripples could no longer be seen as morally guilty and deceitful by birth, as they were traditionally. In Germany, the usage of the word crippled (*Krüppel*) for war invalid (*Kriegskrüppel*) bore difficulties, since the word *Krüppel* was perceived as a negative one, «with a hideous sound», a swearword in South Germany, so much that Biesalski turned to other European languages and used more neutral words, like *Kriegsgeschädigt* (war-damaged) or *Kriegsinvalide*. The change was not easy, so that Biesalski and Würtz decided to reverse the meaning, altering

<sup>42</sup> A. Gibelli, *Il popolo bambino. Infanzia e nazione dalla Grande Guerra a Salò*, Torino, Einaudi, 2005, pp. 56-61.

<sup>43</sup> Bracco, *La patria ferita*, cit., pp. 170-90. F. Zavatti, *Mutilati ed invalidi di guerra: una storia politica. Il caso modenese*, Milano, Unicopli, 2011, reconstructed the history of ANMIG of Modena 1917-1948, using archival sources.

<sup>44</sup> On English, French and German ways to deal with the memory of the fallen see J. Winter, *Sites of memory, sites of mourning, The Great War in European cultural history*, Cambridge, Cambridge University Press, 2014, first ed. 1995; Id., *Remembering war. The Great War between memory and history in the twentieth century*, New Haven [u.a.], Yale University Press, 2006. J. Winter, E. Sivan (edd.), *War and remembrance in the twentieth century*, Cambridge, Cambridge University Press, 1999 and 2000, deals also with Israel, Russia and USA. But see also G.L. Mosse, *The nationalization of the masses: political symbolism and mass movements in Germany from Napoleonic Wars through the Third Reich*, Ithaca, Cornell University Press, 1991, first ed. 1975. For the Italian model see Gibelli, *L'officina della Guerra*, cit.; E. Gentile, *Il culto del littorio: la sacralizzazione della politica nell'Italia fascista*, Roma-Bari, Laterza, 2008, first ed. 1993; M. Isnenghi (ed.), *I luoghi della memoria: Simboli e miti dell'Italia unita*, Roma, Bari, Laterza, 1996.

<sup>45</sup> In 1943 he was arrested by Fascist police. He then joined the monarchic party and was elected again in the chamber of Deputies in 1953. *Dizionario Biografico degli italiani*, Roma, Enciclopedia Treccani, 1988), s.v. "Delcroix, Carlo" (by A. Vittoria), <[http://www.treccani.it/enciclopedia/carlo-delcroix\\_\(Dizionario-Biografico\)/](http://www.treccani.it/enciclopedia/carlo-delcroix_(Dizionario-Biografico)/)> (last accessed: August, 13<sup>th</sup>, 2016).

the perception of the word *Krüppel* and making it a positive one. Whereas the concept of deformed man was associated to being unable to work and being a beggar, possibly with a nasty soul, it had now to remind people of an heroic attitude, iron will, and ability to go back to work: it had to become an name of honour<sup>46</sup>. This view of Biesalski and Würtz was shared in Italy by Galeazzi, as above said.

A mental shift was needed to make people consider deformity as a sign of moral greatness. It has been rightly noted that dead war heroes were represented as young and beautiful, forever fixed in the supreme act of heroism. Their death and bodies were aesthetically represented<sup>47</sup>, but the war mutilated were deformed, scary and horrid (suffice it to think to the soldiers who had their face disfigured<sup>48</sup>). To accept them as heroes was much more difficult, and a huge effort of propaganda was needed.

Sabine Kienitz has carried out a refined analysis of the shifts in the meaning of the concept of war mutilated in Germany, questioning Deborah Cohen's interpretation. Cohen does not distinguish the two meaning of the German word *Opfer*: victim and sacrifice. The war mutilated were considered passive victims (of a senseless atrocity) and therefore used by socialist propaganda; but when they were depicted as sacrifice, they gained a religious halo: they had deliberately chosen to donate their body to the Nation. That gave them a sense of recognition. After the war, insistence on asking for economic compensation made war invalids in the Weimar Republic to be seen again as victims instead of as heroes<sup>49</sup>.

Deformity became a visible sign of patriotism that compelled the government to intervene to help war invalids<sup>50</sup>. As H.-J. Stiker has pointed out, the war-injured took the place of the disabled, and the image of disability became one of a deficiency to eradicate, thanks to rehabilitation, a notion that was gradually extended to all the disabled<sup>51</sup>. This change in attitude was not swift or easy (new forms of support co-existed with traditional bias and scorn), but the Great War was nonetheless a turning point in mental attitude and in social and legislative provisions. Vocational teachers and officers helped the veterans to find the job and the training most suitable for them<sup>52</sup>. «For good or ill, the

<sup>46</sup> Kienitz, *Beschädigte Helden*, cit., pp. 113-20.

<sup>47</sup> *Ibid.*, pp. 79-84.

<sup>48</sup> J. Winter, *Forms of kinship and remembrance in the aftermath of the Great War*, in Winter, Sivan (edd.), *War and Remembrance in the Twentieth Century*, cit., pp. 48-51.

<sup>49</sup> Kienitz, *Beschädigte Helden*, cit., pp. 94-109; Cohen, *The War come Home*, cit., pp. 88-97.

<sup>50</sup> Actually, not all States helped invalid servicemen, see A. Magowska, *The Unwanted Heroes: War Invalids in Poland after World War I*, «Journal of the History of Medicine and Allied Sciences», vol. 69, n. 2, 2014, pp. 185-220.

<sup>51</sup> H.-J. Stiker, *A History of Disability*, Ann Arbor, The Univ. of Michigan Press, 1999, original edition Paris 1997, pp. 124-25.

<sup>52</sup> See Galeazzi, *L'Esposizione interalleata dei lavori degli invalidi di guerra*, cit. Italy was advanced in the re-education of blind veterans, with the Colosimo School of Naples and the School of Milan, directed by Lavinia Mondolfo.

disabled were exceptions and stood for exceptionality, otherness; now that they have become ordinary, they have to be returned to ordinary life, to ordinary work. They no longer represented anything that is other, [...] they have simply become “different”». But this may hid the attempt to negate the difference and to assimilate the disabled, in a cultural perspective that tends to homologation, rather than to respect of differences<sup>53</sup>.

In this respect, the rush to build prostheses had also a symbolic aspect: science could re-make men. Many amputees preferred to use their stump, rather than that the artificial limb, but in order to make men functional again, different artificial limbs were produced, some of which replaced the lost hand with just mechanical tools. Different amputation techniques were experimented with and nationalistic feelings conditioned also the choice of the type of prosthesis: German orthopaedists disagreed about the American Carnes arm: considered the best artificial arm by many, it was contested by others as expensive and produced by the enemy; Italians, as already mentioned, preferred the Vanghetti hand<sup>54</sup>.

The improvements in orthopaedic surgery and technology were widespread. This advancement in science was a sort of compensation for the destruction and sorrow caused by the war. The photographic descriptions of the time in fact stressed not only the catastrophic effects of the war on the human body and life, but especially the modern medicine progress. Medicine and sciences were strongly emphasized in their ability to repair the war damages, particularly thanks to the relevant development in surgery, in the techniques of amputation and in the research about prostheses. For the first time, the modern medicine tools were presented not only to the specialists but also to every reader, testifying the innovative and impressive possibilities of science. Galeazzi's booklets and the illustrated brochures of the National Prosthesis Workshop of Gorla were parts of this process that popularized the success of orthopaedics<sup>55</sup> (Pic. 1).

Moreover, in Italy the maimed soldiers heroism was usually not illustrated in a perturbing and unpleasant way. Bloody or cruel pictures were avoided in journals or postcards, while images with no signs of distress and pain were preferred (Pic. 2). Pictures should describe comfortable situations, thus reassuring people about the care provided to the wounded thanks to science. Photographs usually showed men engaged in works activities, following their social rehabilitation through vocational training<sup>56</sup>.

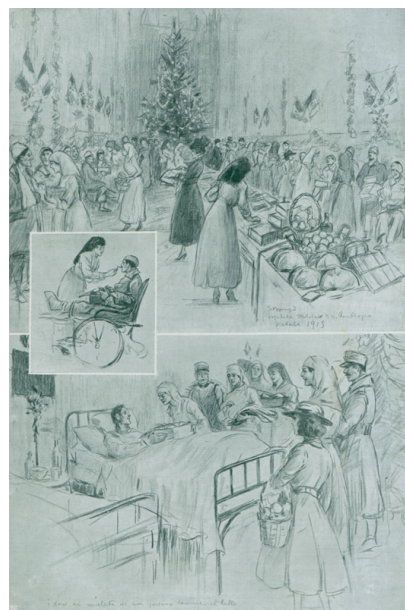
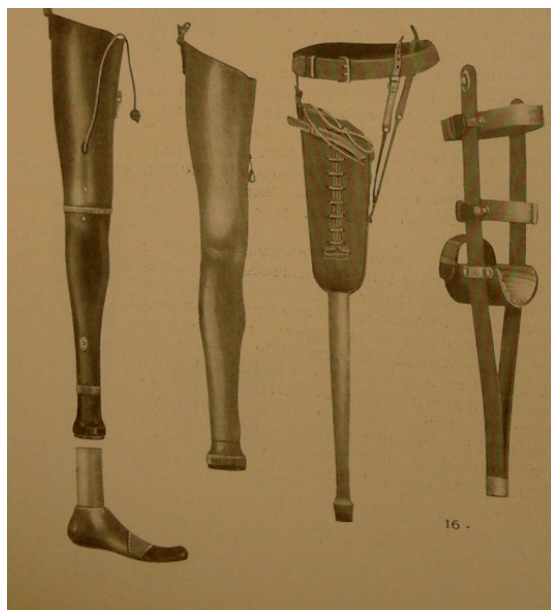
<sup>53</sup> Stikers, *A History of Disability*, cit., pp. 128-38 on this question.

<sup>54</sup> On this topic see the detailed pages of Kienitz, *Beschädigte Helden*, cit., pp. 156-94.

<sup>55</sup> See Galeazzi's works quoted in footnote 7 and *Officina nazionale di protesi per mutilati in guerra in Gorla*, cit.

<sup>56</sup> Bracco, *La patria ferita. I corpi dei soldati italiani e la Grande*, cit., pp. 200-203. See also B. Bracco, *Il mutilato di guerra in Italia: polisemie di un luogo crudele*, «Memoria e ricerca», 38, 2011, pp. 17-19; A. Gibelli, *La nazione in armi. Grande guerra e organizzazione del consenso*, in G. De Luna, G. Dautilia, L. Criscenti (edd.), *L'Italia del Novecento. Le fotografie e la storia*, Torino, Einaudi, 2005, vol. I, pp. 38-70.





Pic. 1. (left) Prostheses produced in the National Prosthesis Workshop of Gorla, in *Officina nazionale di protesi per mutilati in guerra in Gorla, Milano, Alfieri & Lacroix* [1917], p. 16.  
 Pic.2. (right) Wounded soldiers represented in the hospitals of Milan during Christmas time, «*L'Illustrazione Italiana*», vol. 1, 1916, p. 4.



Pic. 3. Achille Beltrame illustration in Galeazzi's scientific review «*Archivio d'ortopedia*», vol. 33, 1916, p. 28.

Also in Italy assistance to mutilated soldiers and their inclusion in society as working men, rather than invalids, was mandatory. As Galeazzi had immediately claimed, it was a moral duty of the State towards its wounded defenders, as well as an economic and social question. War cripples, as above said, had to be persuaded they could and should be active again, even if they had a pension. Propaganda in favour of the mutilated soldiers was produced, both depicting them as heroes and encouraging them to go back to work. In a beautiful drawing of the illustrator Achille Beltrame, for instance, an angel-shaped Italy is supporting a war invalid, whose leg is presumably amputated, but one just sees the crutches, so that the image is not violent. The woman-angel that personifies Italy and looks like a Greek goddess, points at smoky factories, encouraging the invalid to work in them. The text that accompanies the pictures was by Giovanni Bertacchi and rhetorically praised the soldiers («Repair, Italy, war offences in brave veterans, bring them back to peace and to jobs for life; no whole is more sacred than this flesh, wounded while heroically unlocking roads to native soil»)<sup>57</sup>. The picture was re-printed in the pages of Galeazzi's scientific review *Archivio d'ortopedia* and indeed well portrayed his ideas (Pic. 3).

After the War, Italy itself was depicted by the propaganda, particularly the nationalistic one, as crippled by the allies' greed: newspapers, intellectuals and politicians spoke of «mutilated victory». The mutilated soldiers thus embodied their mourning Motherland. The term «mutilated victory»<sup>58</sup> was created by the poet Gabriele D'Annunzio, vehement interventionist, aviator, who lost an eye but refused to stop flying and fighting, carrying out famous war actions. He himself was depicted as «the one-eyed clairvoyant», a definition that suggested an echo of Homer and Tiresias.

Already during the war but particularly after the tragic defeat at Caporetto (24-26 October 1917), the amputated body had become the symbol of a national sacrifice and hence of a moral regeneration. Mutilated veterans on posters and in propaganda were presented as symbol of a nation fighting for victory<sup>59</sup>. Kienitz's analysis on the meaning of the word "victim" is pertinent for the Italian case, too: those, like D'Annunzio o Delcroix, who stressed the voluntary act of donating one's own life or body to the nation, asked not for pity, but for a social recognition of their heroic act. They were not passive in front of the horror of the war, but rather faced it bravely.

The propaganda illustration of the Italian soldiers aimed to emphasize the Fatherland defenders' sacrifices. Indeed the pictures depicted in journals, postcards and school exercise books covers presented heroic wounded soldiers,

<sup>57</sup> *Archivio di ortopedia*, speech at the Lombard Society of medical and biological sciences, held on January 15 1915, «Archivio di ortopedia», vol. XXXIII, 1916, p. 28.

<sup>58</sup> G. Sabbatucci, *La vittoria mutilata*, in G. Belardelli et al., *Miti e storia dell'Italia unita*, Bologna, il Mulino, 1999, pp. 101-106.

<sup>59</sup> B. Bracco, *Da soldati a reduci*, in M. De Nicolò (ed.), *Dalla trincea alla piazza. L'irruzione dei giovani nel Novecento*, Roma, Viella, 2011, pp. 93-105.



Pic. 4. (left) “National Loan. My eyes for the Mother country. Your money for the Mother country”. Poster illustrated by Alfredo Ortelli [1918]; <<http://www.14-18.it/manifesto/RML0194258?bt=europeanaapi>> (last access: 13.08.2016). Pic. 5. (right) Enrico Toti illustrated by Beltrame on the cover page of «La Domenica del Corriere», 24 September-1 October 1916.

whom deformity and mutilations were visible signs of patriotism and military value. In this kind of propaganda, heroism, willpower and dignity were the dominant themes. The limb absence was no more considered a statement of loss and vulnerability, but it represented the personal sacrifice and courage. Consequently, pictures did not hide the soldiers mutilations, underlining, on the opposite, the maimed veterans’ capability of being the conflict protagonist, even though their injuries, for the Nation sake. As Galeazzi had argued, disabled veterans had to be seen and honoured, not to be hidden.

Besides, the mutilation symbolized a resource for the fund-raising campaign in favor of the Italian military participation to the First World War: Italian citizens were prompted to make voluntary subscriptions, in order to support the mutilated soldiers who had given more than money, having donated a part of themselves to the victory cause<sup>60</sup> (Pic. 4).

<sup>60</sup> B. Bracco, *Il corpo e la guerra tra iconografia e politica*, in *Annali della Fondazione Ugo La Malfa. Storia e politica*, Roma, Gangemi editore, 2013, pp. 303-20 and also Gibelli, *Il popolo bambino*, cit., pp. 55-57.



Pic. 6. Enrico Toti illustrated by Domenico Natoli on a school exercise book cover (1933). Source: University of Macerata, Centre for documentation and research on the history of schoolbooks and children's literature – Fondo Ricca.

*Corriere*, published on its cover a representation of the hero, illustrated by Beltrame, while he was throwing his crutch against the enemies, just before dying (Pic. 5). Toti was considered an example of patriotism and his courage was used to incite Italians to fight for the Nation victory and success. His sacrifice was also remembered in the years following the war, especially by the Fascist propaganda, and his bravery was frequently proposed as a life model. For instance, Toti's representation was laid as a school exercise book covers, in order not to forget his sacrifice and to establish the example in children's minds<sup>62</sup>. Significantly, Beltrame's picture was copied and reproduced, even on exercise book covers, so that Toti's death became an icon of soldiers amputees heroism (Pic. 6).

The heroism of maimed soldiers was embodied by the figure of Enrico Toti, an invalid man who became a legend after his death on the frontline. He was employed as stoker for the Italian railways and lost his left leg in an accident at work. Refusing his disability, he decided to do a worldwide tour by bicycle. Returned in Italy after one year, he tried to join the army as a volunteer. Rejected several times for his impairment, he managed to enlist as an unregistered soldier. He died on August 6 1916, during an Italian attack against the Austrians near the town of Monfalcone. Toti ignored fear and pain despite the fact he did not have a leg. He was awarded, few days after his death, the Gold Medal of Military Valor<sup>61</sup>.

Enrico Toti's life story was strongly utilized by the public media to enhance the self-sacrifice for the benefit of the Fatherland. Indeed, less than two months after Toti's death, the most diffuse Italian popular magazine, *La Domenica del*

<sup>61</sup> Salvante, *Italian Disabled Veterans between Experience and Representation*, cit., pp. 113-117.

<sup>62</sup> For a more in depth study about Enrico Toti see also E. Toti, *Lettere: raccolte ed ordinate da Tomaso Sillani*, Firenze, R. Bemporad e figlio, 1924; L. Fabi, *Enrico Toti: una storia tra mito e realtà*, Cremona, Persico, 2005.

## Conclusions

The devastating experience of the Great war was indeed a crucial moment in the history of orthopaedic, but also in that of special education. As had already happened in the Napoleonic wars, the world conflict, with mass armies and trench warfare, produced great progresses in surgery and particularly in the techniques of amputation, as well as in research into prostheses. The opposition of general surgeons to an autonomous orthopaedic surgery, still present at the beginning of the war, was soon set apart, and governments on both sides realized the compelling need for orthopaedic hospitals<sup>63</sup>.

More lives were saved, but a huge numbers of young adults ended up permanently disabled, so that the nations had to face the great difficulty of integrating into society many men who had served their country. This posed problems of welfare and, more generally, stimulated a humanitarian attitude towards the cripples, even if this attitude was not immediate or widespread everywhere: England preferred to hide her maimed soldiers in homes, and many Germans came to resent those disabled in war, who during the terrible inflation of Weimar Republic years managed to survive better than other people, thanks to their pensions or the job they were allowed to keep. In Italy, maimed soldiers were supported by local committees, by ONIG and by their own association ANMIG and managed to have their rights fairly recognized after the war. The interventionist and nationalistic spirit overwhelmed the pacifist and socialist one in the propaganda for mutilated soldiers, but it has to be remembered that the nationalistic vision gave a sense, even a sacral one, to a sacrifice otherwise difficult to bear. Many war invalid shared a nationalistic view, from D'Annunzio to Delcroix. Mussolini insisted on his war injuries, to link himself to the disabled veterans.

Galeazzi was a patriot and a nationalist. His ideas, thanks to his role and his recognized scientific authority exerted a strong influence on re-educating soldier amputees. Milan, with Bologna, was the leading centre for prosthesis making and for vocational training. Galeazzi's scientific activity and his indefatigable engagement with boards, associations, committees, public speeches, conferences and writings made him a leading figure. His ideas about re-education were founded not only in his deep knowledge of international institutes, but rather on his previous experience on educating young people who were lame, mutilated, and paralytic. For him training them to work meant giving them the chance to get economic independence, but, most of all, respecting them. He did not equate citizenship with being a tax-payer, as Biesalski did. Men or women who could not earn enough to support themselves, who needed care and financial aid,

<sup>63</sup> *How Canada is caring for her crippled soldiers*, «Editorial JB&JS», 1917, pp. 547-551; R.B. Osgood, *The orthopaedic centres of Great Britain and their American medical officers*, «JB&JS», 1918, pp. 132-140. On the topic see Cooter, *Surgery and society in peace and war*, cit.

were not to pity, but to respect. Like Biesalski he refused religious mercy. Work was the lay way to recognize the dignity of the invalid person, whether born so or crippled in war. Rather than a Christian brotherhood, he believed in a lay fraternity within the mother country.

This paper has pointed out Galeazzi's role and has described his activities for maimed soldiers, linking them with his previous educational care for young cripples, and has sketched some landmarks in Italian assistance and propaganda, that depicted soldiers amputees as heroes. Toti's story and its use as propaganda are somehow connected to Galeazzi's stamp: a civil invalid who carries on working, who rides a bike with one leg, who volunteers, who never surrenders, not even in face of death. Science was necessary, but without the maimed cooperation re-education was not possible: it was the power of the disabled's will, in the end, that could overcome every obstacle, as Würtz had claimed<sup>64</sup>. This propagandistic view accentuated Galeazzi's more realistic opinion about the need of a wide social collaboration: policy, science, technology, civil organizations and the single amputee should work together.

<sup>64</sup> H. Würtz, *Der Wille siegt!*, «Kriegsbeschädigten-Fürsorge in Niedersachsen», 23 Dec. 1916, pp. 329-331.

# Between the recovery of abandoned children and vocational training: the Italian training-ships between the Nineteenth and Twentieth century

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**ABSTRACT:** This essay aims to reconstruct the history of training-ships, educational institutions for abandoned children appeared in Italy between the second-half of the 19<sup>th</sup> and the first half of the 20<sup>th</sup> century. Once introduced in Italy, following the English model, the training-ships received little consideration from the Italian political world so that they continued to exist only thanks to the support of philanthropists and individuals. Later, training-ships started to have also other aims such as the professional training for sailors and fishermen and in particular, the military training during the Fascist regime.

**EET/TEE KEYWORDS:** Abandoned children; popular education; Education and formation of workers; Italy, XIX<sup>th</sup>-XX<sup>th</sup> Centuries.

## 1. *At the origins of the training ships: Jessie White Mario's and Pasquale Villari's proposals*

The historiography on abandoned children in Italy between the modern and the contemporary age has seen, in recent decades, the publication of numerous and qualified studies. They traced the historical evolution of the legislation in the field of abandoned children and their recovery and of the institutions committed in their care and presented the figures of the educators who most distinguished themselves in this battle of civilization. The history of the training-ships, which covers the period between the liberal age and the fascist period, represents an original and interesting part of this broader history, though it

remains still today a little known experience for the historical-educational research. Only brief remarks on the activities of the training ships appear, in fact, in some general studies while, in recent times, this educational experience has been described in some publications and photo exhibitions in the form of memoirs<sup>1</sup>. But, although that experience gave results below the expectations of their patrons, who had the dream of creating a vast network of training-ships in the major Italian coastal cities, it is essential to understand a part of the cultural history of a young State that, emerged from the Risorgimento wars, was trying with great difficulties to follow the road of the civil progress looking at the best practices of a major European country such as the UK.

The first to write this story was a woman, perhaps not coincidentally of English origin, Jessie White Mario, wife of the Mazzinian Alberto Mario, former nurse in Garibaldi's military campaigns and leading figure in the Risorgimento and then in the democratic movement of post-unitary Italy. White Mario, accepting the invitation of the Neapolitan historian Pasquale Villari, who in 1875 had published his famous *Lettere Meridionali* that opened the debate on what was later called the «southern problem», personally went to Naples to understand the problems of the Neapolitan working classes.

Villari, in fact, had asked the intellectuals of the new Italy to closely study the problems of the southern regions, burdened by economic backwardness, laxity of the ruling classes, illiteracy and crime<sup>2</sup>. His proposal, as he himself remembered, «raised a lively debate» on the newspapers of the time, some of which accused him of not knowing Naples because of his long absence and of not knowing the «great misery of London, much worse than that in Naples»<sup>3</sup>.

The journalistic investigation by Jessie White Mario, born into a family of wealthy British ship owners, was published serially in 1876 in the Neapolitan periodical «Il pungolo», and then collected in a single volume the following year, with the significant title *La Miseria in Napoli (The Poor of Naples)*. It was a first-hand journalistic investigation carried out in the poorest areas that analyzed, from a socio-political point of view, the conditions of the Neapolitan

<sup>1</sup> On the training-ship Garaventa of Genoa see: C. Peirano, E. Garaventa Cazzulo, *La nave scuola Garaventa: una scuola di vita*, Genova, De Ferrari, 2004. Hints in N. D'Amico, *Storia della formazione professionale in Italia*, Milano, FrancoAngeli, 2015, p. 229. On the training-ship Caracciolo of Naples see A. Mussari, M.A. Selvaggio (edd.), *Da scugnizzi a marinaretti: l'esperienza della nave asilo Caracciolo, 1913-1928: mostra foto-documentaria*, Napoli, Edizioni scientifiche e artistiche, 2010. For an introduction on the phenomenon of abandoned children in the first years of the XX century in Italy, see: F. Cambi, S. Olivieri, *Storia dell'infanzia nell'Italia liberale*, Firenze, La Nuova Italia, 1994. For a history of the English training ships see: P. Carradice, *Nautical Training Ships: An Illustrated History*, Stroud, Amberley Publishing 2009.

<sup>2</sup> Villari's articles were published on the Roman cultural periodical «L'Opinione», and then collected in a volume by Le Monnier in 1878. A new widened edition was published in 1884 with the title *Lettere meridionali ed altri scritti sulla questione sociale in Italia*.

<sup>3</sup> Letter by Pasquale Villari to Jessie White Mario with the date 30<sup>th</sup> May 1876 and published in J. White Mario, *La Miseria in Napoli*, Firenze, Successori Le Monnier, 1877, p. 11.



people and of the public and private institutions committed in finding the right remedies for those problems. The English writer complained about the local political class that, although aware of the widespread misery, preferred to deny the problems and not to awaken the conscience of a people reduced to resignation and passivity. White Mario, describing one of the institutions dedicated to abandoned children, the Annunziata Orphanage of Naples, stressed its limits that were to «create a class of idlers and consequently of depraved men at the expense of the society»<sup>4</sup>. The boys who were given to the cares of the pious institution, in particular, were almost all «entrusted to a nanny», i.e. to some families who rarely gave them back if they could benefit from their work. If they were returned to the Orphanage, they were entrusted, after the age of seven years old, to the so-called Home for the Poor, thus condemning them to abandonment, vagrancy and begging. The English writer claimed that, in order to remedy this problem, the institution would have to supervise them at least up to a certain age, forcing the family that adopted them to send them to school and to teach them a profession. So, White Mario, in order to find practical and operational solutions, came to propose the establishment of training ships on the example of the Anglo-Saxon ones:

It is particularly evident the usefulness of the *training ships*, or ships used as schools, to educate sailors for the future of this country, the future, and only, rival in Europe of England at sea. If you think that the State, for its safety, is forced to house, keep, feed and clothe all its children once they are guilty, it is strange indeed that it does not care about them when they are innocent and can become useful and honest citizens<sup>5</sup>.

The writer, to support her theory, reported the positive results (social recovery, increased discipline, growth of the spirit of solidarity between comrades, improvement of young people) obtained by some English training ships. White Mario, citing the reports published by some inspectors who had visited some of those schools, wrote:

One of the Inspectors of the training ships *Chichester and Arethusa*, where 400 cabin boys were educated, writes that in a year every guy had gained on average 7 kg in weight, 15 cm in height and 20 cm in width of the chest. It is estimated that every guy in England costs 500 pounds a year, while in Italy only 300. When, in January, two of these ships caught fire, the *Goliath* and the *Warspite* (the latter at night), these boys were so disciplined, brave and calm that there was not a cry of dismay; the salvation boats were lowered, and the older boys, on these boats or swimming like fish, helped the little ones, all or nearly all were saved, and the country, struck by admiration for this noble conduct, soon repaid for these damages with a private subscription<sup>6</sup>.

<sup>4</sup> *Ibid.*, p. 98.

<sup>5</sup> *Ibid.*, p. 99.

<sup>6</sup> *Ibid.*, pp. 260-261.

The proposal of the English writer took the form of an invitation to the City of Naples to find as soon as possible an agreement with the Ministry of the Navy in order to obtain «one or two anchored ships in Naples», and with the Ministries of Trade and Agriculture, and of Education to found the necessary schools on them. At the same time, the State should cease the indiscriminate dismantling of the old vessels for the mere recovery of materials and choose some ships to accommodate the new training ships for the recovery of children in need. The validity of this proposal, concluded the wife of the Italian patriot, was also economic: in fact, the cost of the new training ships would be less than that necessary for the building of new prisons. White Mario wrote:

Now let's think to begin to gather 400 children in Naples from the districts of Porto, Mercato, Pendino, Montecalvario – from nine to sixteen years; and to gather the sailors who are entitled to a pension, in order to educate them to this job; and the teachers of the municipal schools, to give them primary education – within five years there will certainly be 400 boys less destined to prison and 400 more that will carry proudly the name of the Italian merchant ships, and even of the Royal Navy, around the world. And the expense for this installation can not be an element to be objected. The cost for the new prisons is of about 103 million: it is right to spend a little money to adapt the old ships to schools for cabin boys, and then, in the future, the Ministry should really intervene in the administration of the pious institutions in Naples, in order to find assets for the education of poor children, assets that are now used in a totally different way respect to their real purpose<sup>7</sup>.

Villari, in March 1878, reviewing the book of the English writer on the columns of the Florentine periodic «La Rassegna settimanale», although emphasizing the author's philanthropic and humanitarian spirit, considered the investigation she carried out in Naples weak under certain aspects. He appreciated, however, the proposal to establish some training ships on the Anglo-Saxon model, wishing their rapid spread, though imagining the difficulties of such a project due to the indifference of the Italian ruling class that did not seem prepared to introduce social measures in favour of the working classes. In this regard, he wrote:

What she said about the training ships, ships on which a lot of abandoned children are gathered in England, thus creating a valuable school of cabin boys, seems to be very appropriate. We certainly could do the same without difficulty, if ... if the government of Italy was not made by the rich people and for the rich people. This is the true nature of the parliamentary system in almost all fields; but woe betide the rich people who do not know all their duties! The day when they have been taught will come. The history of France proves this. Meanwhile, free elementary schools for millionaires, yes; technical schools and high school and almost free university, financed by the State, yes; but also an Institute for poor

<sup>7</sup> *Ibid.*, p. 261.

people at the expense of the State, such as the industrial schools in London, or training ships subsidized by the State: this would be something too *English*, contrary to the true principles of public economy. That this science was born, developed, applied in England is ... another question<sup>8</sup>.

Villari, in September of the same year on «La Rassegna settimanale», proposed again the idea of the training ships, also in the light of other recently published documents that were specifically mentioned: a report by «Mr. Catalani, appointed to the Italian Legation in London», and Sir Charles Trevelyan's documents<sup>9</sup>. The Neapolitan historian opened his article with a comparison between the English and the Italian law in the field of the struggle against poverty, stressing that in England it was guaranteed by the principle according to which the State, by means of a special tax, should help «a man who, without his own fault, has no means to support himself». Thanks to this legislation, Villari argued, institutions like the almshouses or workhouses and the reformatories were financed, institutions undoubtedly useful but not totally without limits: the children in the workhouses, «spending their time with idlers, became idle and lazy too», while in the reformatories, «staying with vagrants and criminals, they not always [became] hardworking and honest». The historian underlined that, in order to solve this problem, a law was passed in England in 1866, the *Industrial Schools Act*, which, in addition to found the industrial schools, some with a boarding school, gave the possibility to every citizen that found an abandoned child to take him to a magistrate to enroll him in an industrial school or in a *reformatory*, according to his behaviour, paying or for free, depending on the conditions of the family. The main advantage of this law was the separation of the children from those already committed to crime and from their families, if they had not been able to give them education. Villari noted that the *training ships*, adopting the same principle, were a very useful educational means:

The children are separated from the society, and put on ships, that became schools, in which they receive elementary education and a perfect nautical training, thus becoming excellent cabin boys and sailors. They learn all that is necessary to lead a merchant ship or a warship, including the gun handling; they are educated to the life of the sea and of navigation. Teachers, educators, military instructors, everything is in the vessel in which they live<sup>10</sup>.

Villari continued his speech stating that in England in 1874 there were already fifteen training ships, on which there were 3,511 pupils. More specifically, three ships were reformatories, who housed pupils who deserved correction and punishment, while eight were industrial schools, i.e. schools that housed

<sup>8</sup> [P. Villari], *La miseria in Napoli*, «La rassegna settimanale», n. 1, 3<sup>rd</sup> March 1878, pp. 146-148.

<sup>9</sup> [Id.], *Una proposta utile*, «La rassegna settimanale», n. 9, 9<sup>th</sup> September 1878, pp. 137-138.

<sup>10</sup> *Ibid.*, p. 138.

students that needed education and to be kept away «from bad company». Four ships, finally, were independent ships and welcomed only students able to pay. If the former were mainly supported by the State, the latter were financed at the expense of both the State and private charity. The historian then passed to analyze the system of one of these ships, the *Cumberland*. It was established in 1869, and had already received 1,213 pupils until 1876. The study course was divided into four years, during which the pupils learnt to read and to write, they studied arithmetic and geography and read the Bible. Most of the time was devoted to practical education and sailor exercises. Despite the advantages offered by the training ships were clear, Villari bitterly concluded his article showing his low confidence in the Italian government from which he did not expect particularly brave laws to fight the poverty and misery of the working classes.

## 2. *Niccolò Garaventa and the establishment of the first Italian training ship in Genoa*

As expected by the Italian historian, the Italian government was not concretely interested in the introduction of the English model of the *training ships*. This indifference was also criticized by Augusto Pierantoni, senator from Abruzzo, left-wing representative, former soldier in Garibaldi's arm and secretary in the Ministry of Public Education during the dictatorship in Naples. Pierantoni, in a Senate debate on the kindergartens in December 1887, remembered White Mario and Villari's recent requests for the creation of floating schools and recalled an early example of Italian training ship built in Napoli in the summer of 1860, during the brief months of Garibaldi's dictatorship:

The usefulness of these foundations was understood in Naples during the dictatorship. I remember that the Neapolitan navy, which remained loyal to the homeland disdaining the Austrian waters on the evening of the 6<sup>th</sup> of September 1860 and refusing to follow the Bourbon chased by the national revolution, gathered on an old ship a lot of abandoned children in the streets of Naples to educate them to be good cabin boys. That was a provident institution. I asked some years ago, what were the consequences of that first experiment; I was told that the floating nursery school had been abandoned because it had not given good results. What happened in England had to happen in Naples, too. At the beginning, a lot of people despaired and threw themselves into the sea, due to the military rudeness. But England knows how to be strong and tenacious, and kept the useful institution. The Italian administration, instead, got tired at the first difficulty<sup>11</sup>.

<sup>11</sup> See *Atti parlamentari. Senato del Regno. Legislatura XVI, seconda sessione 1887. Discussioni. Tornata del 16 dicembre 1887*, p. 185.

Given the disinterest of the State, the first real Italian training-ship was born thanks to a private initiative, that of the Genoese Niccolò Garaventa<sup>12</sup>. After his mathematical studies and having obtained the degree of Bachelor in 1867 at the University of Genoa, Garaventa started his teaching career in various municipal and State institutions, until he obtained the chair in the Technical School Usodimare. During the seventies, the Ligurian philanthropist was committed in carrying out educational initiatives in favour of the working class: in 1873, he created some free schools for merchants and, in 1878, those for adults which, then, turned into evening school for peasants and labourers, reaching the number of about two hundred enrolled students<sup>13</sup>. It was in the autumn of 1883, as he narrated in some of his memories, that the idea of doing something for the poor and abandoned children seized him. One morning, in the September of that year, on his way to school, crossing the Valley of Secca, near Cremeno, a barefoot and dirty boy of about eight years, clothed with rags, approached and asked him some bread in dialect. After a first moment in which it was tempted to send the boy away, Garaventa asked him about his parents. He then discovered that both were hospitalized and that he, the oldest of six children, after the school in the morning, begged for some bread for himself and his brothers. Struck by so much misery, Garaventa firstly asked information to the child's teacher, and then began looking for children in similar conditions in the Portoria district to enroll them in the new school he had decided to establish of his own initiative. It was called Scuola Officina-Redenzione (School-Workshop-Redemption) and had the purpose to gather young people under the age of sixteen years already «with criminal record or about to have it» and «children of troubled parents or delinquents, abandoned to themselves». The school system was organized in a preliminary course, where the illiterate children started learning to read and write, a common course, where they attended Italian, geography, calligraphy, music, religion lessons, and they carried out rowing and military exercises and swimming activities, and, finally, two professional courses: one for engine-drivers and one for cabin boys. The institution, after an initial phase of distrust that resulted in negative comments about Garaventa – considered a «vain», a «swindler», a «charlatan» and even a «madman»<sup>14</sup>, accused to be Republican, anarchist and also a «paolotto» – managed to obtain, thanks to the Prefect of Genoa, subsidies from the government and the Town Hall. His project of recovery of abandoned childhood was finally completed when, along with the school, a ship was established, following the example of the English *training ships*, in which the young people who had had problems with

<sup>12</sup> See A. Molinari, *Garaventa Niccolò*, in G. Chiosso, R. Sani (edd.), *DBE: Dizionario biografico dell'educazione (1800-2000)*, 2 voll., Milano, Bibliografica, 2013, Vol. I, pp. 615-616.

<sup>13</sup> See *Niccolò Garaventa fondatore e direttore della Scuola-Officina Redenzione in Genova*, Genova, Stabilimento Fratelli Pagano, 1886, p. 6.

<sup>14</sup> *Scuola Officina Redenzione fondata e diretta dal prof. Niccolò Garaventa Genova con sezione di Milano*, Genova, Tipografia Genovese, 1892, p. 10.

the law or who had suffered social problems could be re-educate. According to his pedagogical view, this hard work was made possible «by the effect of the sea», which could «purify» the minds of these complicated guys, better than the houses of correction, in which there were frequent escapes, brawls and behaviour problems. So the Italian journalist Luigi Arnaldo Vassallo, under the pseudonym of «Gandolin», wrote:

These guys – already so troubled and prepared to crime – found in the sea the hygiene, not only of the body, but also of the souls. I saw them – returning back from the police station or the prison – weakened in their limbs and spirit, with their grim and restless eyes, pale, dirty, emaciated, miserable inside and outside: and then I saw them colourful, strong, tanned by the sun, with joyful eyes, the teenage smile and singing the sailor songs, working happily on the ships, like old sea dogs<sup>15</sup>.

The creation of the Genoese teacher – who in 1885 received from the State, under the initiative of the Minister of Marine, Benedetto Brin, an abandoned ship, the Cappellini<sup>16</sup>, and in 1893 a more modern vessel bought thanks to public charity – began to arouse the interest in the Genoese judicial circles. The Deputy Prosecutor Cesare Colombo, for example, opening the legal year in Genoa, on the 7<sup>th</sup> of January 1885, praised the example set by Garaventa in the recovery and rehabilitation of «little criminals»<sup>17</sup>. His counterpart, Count Ettore Macola, opening the judicial year in January 1892, reminded the «important advantages» of the Genoese training ship<sup>18</sup>. In those years, the debate of the pedagogical and criminal sciences began to give attention to Garaventa's experience: in 1892, Ildebrando Bencivenni, a positivist professor of education, dealing with the theme of abandoned childhood in his book *Fanciulli infelici*, also spoke about the institution created by the teacher; other references appeared in «Rivista Penale», directed by Lucchini and printed in Bologna, and in the magazine «Rivista di Discipline Carcerarie», directed by Beltrami-Scalia. Even the Inspector of public security in the port of Genoa, Cavalier Natale Malnate, in a pamphlet entitled *I minorenni delinquenti e la Scuola Officina Redenzione fondata in Genova il 1° Dicembre del 1883 dal Prof. Niccolò Garaventa*, wondering about the cause of the «adolescent's criminality» wrote: It is due to the government, as the same old socialist theorists affirmed, who want an absolute, all-knowing, all-provident and providential government. And the government, in my opinion, is partly responsible: because it wanted and promoted a legislation, even if for an honest desire, that deceives and deludes. What the government could not and did not want to give is left

<sup>15</sup> *Scuola Officina Redenzione fondata e diretta dal prof. Niccolò Garaventa Genova con sezione di Milano*, cit., p. 39.

<sup>16</sup> Peirano, Garaventa Cazzulo, *La nave scuola Garaventa*, cit., p. 25.

<sup>17</sup> *Scuola Officina Redenzione fondata e diretta dal prof. Niccolò Garaventa Genova con sezione di Milano*, cit., p. 43.

<sup>18</sup> *Ibid.*, p. 50.

to private initiative [...]. The noble task to provide shelter, correct, educate, remove from the bad road and give a work to the young delinquents was given not to the magistrature or the police, but to the private initiative, to the virtues of figures like Vincenzo de' Paoli<sup>19</sup>. Even «Critica Sociale», the magazine of the Italian socialism, had to recognize the scientific value of the Scuola Officina Redenzione- even if they harshly criticized the professor Garaventa for the communication style with which he had illustrated the characteristics of his school in a lecture at the Teatro dei Filodrammatici in Milan, so that they defined him a «true theater actor» that, in order to arouse the interest of the middle class, necessary for the establishment of his institution, did not hesitate to behave like a «buffoon», inventing stories like that of the gift of a lot of money by a banker or that of the poor child found in a brothel where he «had the bed in a closet»<sup>20</sup>. In the opinion of the Socialist periodical, the main merit of this school is that it demonstrated the importance of the environment in the education and rehabilitation of children, against the then prevailing anthropological deterministic theories. The columnist of «Critica Sociale» wrote in this regard:

But his efforts may have a high value as a psychological-social experiment. It can demolish the fatalistic theories of certain anthropologists, who deny any kind of power of the environment and attribute almost all evils to education and the unkind nature and fate. The importance of Garaventa's institute is not only in the philanthropic, but also in the scientific field. But, in order for this importance to be perfectly clear, it is necessary that its founder gives us real objective studies. His guys are a precious material to study the modifying action of his system. A clever man as he is, an observer as he may be, can draw real treasures of experimental science from them. Only in this way, he will succeed in arousing the interest of more serious and difficult people. In other words, after a lecture-theatre to amuse the half-wits, he should prepare a serious speech to persuade the judicious people<sup>21</sup>.

It is clear that the magazine referred to the positions expressed by the members of the criminal anthropological school: it is not a case that the founding father of these theories, Cesare Lombroso, expressed a stern judgment on Garaventa's work, whose training ship he considered no more than a «private prison» while the Genoese teacher was defined as a «wild-eyed man» and an «apostle»<sup>22</sup>. As you can guess, the clash arose from the two intellectuals' different vision of the actual chances of recovery and rehabilitation of young delinquents, urchins and vagrants: an impossible task, for Lombroso, that considered the hereditary defect deterministic, unlike the Genoese professor who was confident in the social and moral recovery of these young people.

<sup>19</sup> *Ibid.*, pp. 36-37.

<sup>20</sup> Qualcuno, *L'istituzione Garaventa*, «Critica sociale. Rivista quindicinale di Studi sociali, politici, filosofici e letterari», n. 10, 16<sup>th</sup> may 1892, pp. 158-159.

<sup>21</sup> *Ibid.*

<sup>22</sup> «Lombroso a porté un jugement sévère sur Garaventa (*un allucinato o un apostolo*, voilà ce qu'il est en Italie pour beaucoup de gens compétents)», «Archives d'anthropologie criminelle, de médecine légale et de psychologie normale et pathologique», 1888, pp. 370.

The already mentioned «Rivista di Discipline Carcerarie» also intervened, in 1887, in the Garaventa-Lombroso controversy, siding with the former. One of its editors, Giuseppe Barini, saying he was interested in learning about Garaventa's reform school against which, he said, «the distinguished prof. Cesare Lombroso had proudly said and wrote», commissioned Cesare Verdelli to inspect the Genoese ship and to write a report to be published in its journal. This report was a quite objective analysis where the positive and negative aspects of Garaventa's institution were described. Verdelli wrote:

Scuola-Officina-Redenzione (School-Workshop-Redemption). The name is very pompous! Is there school? – Yes. A workshop? – No. Redemption? – It would seem impossible, but there is and it is complete [...] Garaventa's institution had many enemies, and perhaps rightly. It was established in a place where the urchins can easily evade the vigilance and flee, bringing confusion, anger and fear among peaceful citizens. But now that those little urchins are isolated and harmless, there are no more complaints. The police itself, which perfectly understand the sad effects of prison, makes use of the School-Workshop-Redemption<sup>23</sup>.

Garaventa carried on his work until his death in 1917. In the meantime, new scenarios were opened thanks to the multifaceted work of the biologist and Venetian philanthropist David Levi Morenos, which was supported by a very important politician of the Giolitti period as Luigi Luzzatti, so representing a turning point in the history of the movement of the training ships.

### 3. *Levi Morenos and the revival of the movement of the training ships*

Born in Venice in 1863, from a family of traders of Spanish-Jewish origin, David Levi Morenos had completed scientific studies, graduating in Natural Sciences<sup>24</sup>. He carried out his studies in the years of positivism, so that he acquired a worldview inspired by rationalism and pragmatism and confidence in the ability of science to change the reality for the better. His first analysis, focused on the problems of the Adriatic Sea and the fish fauna, was then extended to the whole social universe of the communities of the Venetian lagoon, so that reflections came to include also social issues. This interest had led Levi Morenos to wonder about very widespread problems among the working classes of the maritime cities, such as alcoholism, care of the orphans

<sup>23</sup> *La Scuola-Officina-Redenzione in Genova*, in «Rivista di Discipline Carcerarie», vol. XVII, 1887, pp. 615-616.

<sup>24</sup> For Levi Morenos' biography and hints on the training ship «Scilla» see L. Montecchi, «Un'esperienza di istruzione rurale integrale». *David Levi Morenos e le Colonie dei Giovani Lavoratori*, «History of Education & Children's Literature», vol. VI, n. 2, 2011, pp. 115-139. The same essay is published in L. Montecchi, *I contadini a scuola La scuola rurale in Italia dall'Unità alla caduta del fascismo*, Macerata, eum, 2015, pp. 267-296.



of sailors and aid to abandoned children. In the wake of a humanitarianism that, at the end of the century, inspired the creation of similar initiatives arisen in other areas of Italy, Levi Morenos had so raised the issue of how to educate the derelict children in the upper Adriatic coast, providing them with primary education, practical knowledge to work as a sailor and, above all, making them «good and free people», to use the words of the Venetian scholar used in a letter to his friend Sibilla Aleramo<sup>25</sup>.

Levi Morenos' early efforts in education dated back to the nineties of the nineteenth century. In that decade, in fact, the Free People's School (1894) was established, with the aim of spreading cultural elements in the lower classes, through regular conferences on topics of general culture, trips and conventions. For the same purpose, he founded in the same year in Venice the «Unione Morale», an association with which he intended to go beyond the limits of the traditional nineteenth-century associations, in order to contribute to the growth of a spirit of brotherhood which transcends the barriers of political parties and social classes. This association was also endowed with a newspaper, entitled «Cronache del rinascimento etico-sociale».

In the same period the Venetian scholar gave birth to some initiatives to foster the cooperation and education of the poor sailors of the Venetian lagoon, «ignorant and prejudiced people»: they were the «Società regionale veneta per la pesca e l'acquicoltura» (1892-93), the first charitable association for sailors, and a cooperative for fishermen (1896). Other attempts saw the establishment, in 1897-98, of the first itinerant course for sea anglers, held in Chioggia, Pallestrina, Murano, Venice, Caorle and Marano Lagunare. Meanwhile, in 1899, Levi Morenos, participating in the National Congress of fishing, proposed the creation of an institution that, four years later, would be born with the name of «Scuola veneta di pesca». It began to work by promoting the first courses and holding the first conferences, but it still lacked a clear educational system and a suitable location: in the meeting on the 3<sup>rd</sup> of April 1903 the Supervision Commission removed any doubt, taking the road of the institution of a training ship. On that occasion, the Commission, after having heard the report of the Director, Levi Morenos, approved an agenda which authorized the institution of a training ship and sanctioned the starting of «the practices to obtain by government the use of an abandoned ship in which to establish the headquarters of the School of fishing and aquaculture, a laboratory and a kindergarten»<sup>26</sup>.

The work of the Venetian philanthropist would not have been possible without Luigi Luzzati's political support: he was one of his personal friends and

<sup>25</sup> Istituto Fondazione Gramsci (hereafter IFG), Archivio Sibilla Aleramo (hereafter ASA), *Corrispondenza*, f. 313, n. 157, David Levi Morenos' letter to Sibilla Aleramo of the 16<sup>th</sup> October 1908.

<sup>26</sup> G. Squarciapino, *...coi remi e con le vele. Le "Navi-Asilo" e l'educazione marinaresca in Italia*, estratto da «La Scuola di Roma. Bollettino della direzione didattica centrale», f. III, 1914, Rome, Tip. Coop. Sociale, 1914, p. 16.

former Minister of Finance in two Di Rudini's governments and, in that moment, again holder of the same ministry in the second Giolitti Cabinet. Just a few months after the approval of the agenda, Levi Morenos was called by Luzzatti to participate in the committee for the study of fishing matters in connection with the renewal of commercial treaties with Austria-Hungary. On the 1<sup>st</sup> of July 1904 the Chamber of Deputies approved the bill entitled «Measures for fishing and fishermen», which included some of the Venetian scholar's proposals. It was established, with the art. 5, that the Ministry of the Navy would give the abandoned ship Scilla to the «Società veneta per la pesca e l'acquicoltura, to make it the headquarters of the fishing school in Venice, and in order to establish, with the assistance of the local authorities of the Adriatic coast, a kindergarten for the fishermen's children to be educated in their fathers' profession». It was also established the free assignment of a building called «Caserma dei Cappuccini», owned by the State, to the municipality of Chioggia with the obligation to make it the headquarters of the «shelter for the poor widows of sailors and fishermen». The delivery of the ship took place in 1905 and the kindergarten was opened in July 1906, with no initial capital and no aid from the State, but only subsidies from private initiatives and charities. At first, the Scilla housed the orphans of the sailors assigned to fishing and traffic, but soon had to accommodate even the fishermen's children and the sailors' ones, of the workers of the port and the abandoned children, in general, with the survivors of the earthquake in Messina and Calabria in 1908. The kindergarten inevitably changed its purposes: not only a preparation for the fishermen, but also a technical education for the lower grades of merchant marine and a preparation for the schools of cabin boys and specialists of the Royal Navy. Students not less than seven years and not more than eleven were allowed, and they could stay up to sixteen. The elementary course was activated on the Scilla, and in the school year 1911-12 it came to be complete, that is, it consisted of six classes. In all classes the teaching program was that provided by the Ministry of Education: it was only adapted to the time and the environment, removing all the parts considered superfluous and adding knowledge of marine life. Most of the day was devoted to vocational education, with ordinary on-board services, tutorials and seafaring works. The original school furniture, donated by the municipality, was replaced because it was in poor condition: in its place benches «of the type invented by the teacher Nardelli», were installed, respecting the hygiene standards and more adapted to the needs of the training ships. On board, there was also a small library. Physical education was particularly cured with daily exercises of rowing, swimming, washing, military exercises (walking, games, free exercises).

The early years of the century, those in which there was the revival of the movement of the training ships, were years of feverish work for the Venetian professor who had at his side a valuable collaborator, his wife Elvira. Thanks to a network of friendships with intellectuals such as the writer Sibilla, the poets Giovanni Cena and Vincenzo Cardarelli, the writer for children Paola

Lombroso, the experience of «Scilla» acquired an immediate fame<sup>27</sup>. Elvira, in a letter to Aleramo asking for her collaboration, wrote:

Then, you and Cena, be prepared to do us another favour. [...] You have to talk about the school to all the artistic, literary and bank celebrities you know. In short, you have to promote the kindergarten as much as you can. Then you have to – we do not admit refusal – so you absolutely have to help us in the creation of a unique number *I figli del mare* that we will sell to collect money for the school. So we expect from you two brief writings, a thought, some lines, etc., in short, what you and Cena will consider more appropriate to be published in an issue that will have a lot of collaborators and little available space<sup>28</sup>.

David and Elvira's correspondence with Aleramo, which covers a time span extending from 1904 until 1913, provides us with important information about Levi Morenos' early years of work as educator. The resulting image is that of a man inspired by strong humanitarian reasons, despite the incumbencies which forced him to recurring journeys between Rome and Venice and the barriers due to ministerial bureaucracy. He believed sincerely in his project aimed at improving the conditions of children in need<sup>29</sup>. The letters also show that the link with Aleramo and the intellectual world, from which the experience of the Schools for farmers in Agro Romano originated, was essential for Levi Morenos, as it is clear from his letter of December 1908:

I received – much later, perhaps after two months from its sending – the moving report of your schools [...] I wanted to and had to immediately write and thank you. I would say that reading some parts of the report moved me, and that my thoughts many times followed you in the Roman countryside and got excited admiring your and Cena's good work and the good teachers who give the best part of their soul to this great propaganda of Humanity, for the abandoned humble people.

<sup>27</sup> See, for example: M. Bersano Begey, *I marinaretti dello "Scilla"*, «Primavera: pubblicazione mensile per i fanciulli», vol. II, n. 8, August 1912, pp. 623-628; P. Lombroso, *Un orfanotrofio galleggiante*, «Emporium: rivista mensile illustrata d'arte, letteratura, scienze e varietà», n. 158, February 1908, pp. 140-152.

<sup>28</sup> IFG, ASA, *Corrispondenza*, f. 303, n. 17, Lettera di Elvira Levi Morenos a Sibilla Aleramo, s.d. [1904-1906].

<sup>29</sup> He wrote in a letter to Aleramo: «There are "financial" difficulties for my coming to Rome in December. The Ministry of Agriculture has sent me away from the Consultative Commission for fishing. It is my fault; I published [...] burning issues and this displeased the high bureaucracy that dismissed me. Peace to them; but meanwhile I am deprived of the famous daily allowance, I can not come to Rome with my Elvira, even if I had to go there for other assignments». (IFG, ASA, *Correspondence*, f. 313, n. 157, David Levi Morenos' letter to Sibilla Aleramo, 16<sup>th</sup> October 1908). In another letter of 1912 he wrote: «I have been at the Ministry for the Navy for the last six months. My Elvira remained in Rome. I am between Venice, Rome and Naples. I work for the new training ship "Caracciolo". I am leaving tomorrow; my life is almost all in the railway. I'll stay in Rome a couple of days to say goodbye to my Elvira, and then I'll go to Venice». (IFG, ASA, *Corrispondenza*, f. 352, n. 225, David Levi Morenos' letter to Sibilla Aleramo, 9<sup>th</sup> September 1912).

I intend to do a little lesson to my children of the Scilla about your students of the Roman countryside, thus arousing a sense of brotherhood for their unknown brothers. You should have some photographs of the Schools of Agro for your conference in Milan on the life in the Roman Countryside (how about doing it also in Venice?). Could you give me some of them?<sup>30</sup>

In the early years of the century, Levi Morenos pursued the educational objective to make abandoned and deviated children «good and free men», inspiring in them goodness and selflessness as a «spiritual father» at the head of an extended family. The same humanitarianism can be found in the aid given to children during the famous Messina earthquake of 1908, during which the Venetian professor, helped needy children, bringing some of them in Venice and hospitalizing them in the «Scilla»<sup>31</sup>. The episode is narrated in a letter sent by Elvira to Aleramo:

Davide returned to Rome on Tuesday after twelve days of stay in Reggio and Messina. When he arrived in Reggio he did not find the orphans he had fetched. However, he was able to do some good actions there and this rewarded him for the material distress suffered. Today the Charitable Institution should give us seven orphans currently hospitalized at Porto d'Anzio. If all goes well we will leave tomorrow night with the little caravan.

4. *The turning point of the '10s: the training ship «Caracciolo» of Naples and the establishment of the Opera di Patronato (Action of Patronage)*

The arrival at the Premiership of Luzzatti, the great patron of the «Scilla» and of Levi Morenos' initiatives – in March 1910 after the crisis of Sonnino's government – represented a turning point in the history of the movement of the training ships. The Venetian philanthropist did not lose the favorable opportunity to extend his initiative to other areas outside of Veneto. He elaborated, in fact, a project which included the creation of another training ship, to be set up in Naples, and prepared the text of a law to subsidize the two training ships with state funds.

The law was ready when there was the crisis of government: the parliamentary work was then continued by the new Minister of the Marine, Leonardi Cattolica, and the law was approved on the 13<sup>rd</sup> of July, 1911. The city of Naples was given the «Caracciolo», a steam corvette no longer part of the military fleet. The «Consorzio pro nave-asilo Caracciolo» was established in Naples, too: an association to promote the creation of the new institute. Levi Morenos' work

<sup>30</sup> IFG, ASA, *Corrispondenza*, f. 313, n. 157, David Levi Morenos' letter to Sibilla Aleramo of the 16<sup>th</sup> October 1908.

<sup>31</sup> IFG, ASA, *Corrispondenza*, f. 317, n. 53, Elvira Levi Morenos' letter to Sibilla Aleramo of the 13<sup>th</sup> February 1909.

proved to be essential: he, summoned to Rome by the Minister Leonardi, was able to work on the new project. We find an echo of the feverish work of the Venetian scholar in a letter of 1912 to Sibilla Aleramo:

I have been at the Ministry of the Navy for six months. My Elvira remained in Rome. I am between Venice, Rome and Naples. I am working for the new training ship “Caracciolo”. I am leaving tomorrow; my life is almost all in the railway. I’ll stay in Rome a couple of days to say goodbye to my Elvira, and then I’ll go to Venice<sup>32</sup>.

Levi Morenos followed the activities of the «Caracciolo» only in the biennium 1913-1914, and then passed the direction to Giulia Civita Franceschi, an educator who led it up to her expulsion decreed by Fascism<sup>33</sup>.

Meanwhile, after starting the Neapolitan experience, Levi Morenos played a leading role in the fortunes of the Italian movement of the training ships. In 1913, in fact, the Action of Patronage of the training ships was established thanks to his fundamental contribution and to the initiative of the Italian Union of National Education. The Minister of the Navy became its effective president and Giovanni Giolitti was the honorary president. The members of the council were: Mrs. Enrica Chiaraviglio Giolitti on behalf of the Italian Union of popular education; Luigi Luzzatti representing the training ship «Scilla»; David Levi Morenos representing the training ship «Caracciolo»; Pietro Lanza di Scalea representing the National orphanage for fishermen’s orphans of Porto d’Anzio; the former Minister of the Navy, Giovanni Bettolo, representing the Navy League<sup>34</sup>.

In June 1914, the Action of Patronage was legally recognized when the Parliament approved a new law, the No. 576, to which the Venetian philanthropist substantially contributed<sup>35</sup>.

The new law, on the one hand, was an official State recognition of the private initiative promoted in the previous decade by philanthropists and politicians sensitive to the problem, on the other, it aspired to create a national body that would promote and co-ordinate a wide network of similar institutions in

<sup>32</sup> Istituto Fondazione Gramsci, Archivio Sibilla Aleramo, *Corrispondenza*, f. 352, n. 225, David Levi Morenos’ letter to Sibilla, 9<sup>th</sup> September 1912).

<sup>33</sup> On this reality see the volume edited by Mussari and Selvaggio, *Da scugnizzi a marinaretti*. On the educator see M. Valeriano, *Biografia di Giulia Civita Franceschi*, in Mussari, Selvaggio, *Da scugnizzi a marinaretti*, cit., pp. 70-90.

<sup>34</sup> See Squarciapino, *...coi remi e con le vele, ...coi remi e con le vele. Le “Navi-Asilo” e l’educazione marinaresca in Italia*, cit., p. 35.

<sup>35</sup> «The Opera di Patronato (Action of Patronage) was established in 1913, thanks to the Unione Italiana dell’educazione popolare [...] Now, with the new law, it became a legal institute (See *Relazione della Commissione della Camera dei Deputati composta dagli onorevoli Luzzatti (presidente), Dentice (segretario e relatore), Chiaraviglio, Nunziante, Mondello, Nuvoloni, Tosti, Congiù, Alfredo Giovannelli*, in D. Levi Morenos, *L’Opera nazionale di Patronato per le Navi Asilo nel 1915*, Roma, Offic. Tip. Bodoni, 1916, p. 32. It met for the first time as an association without the State recognition, in June 1913. See *Navi-asilo per fanciulli abbandonati*, in «I diritti della scuola», 22<sup>nd</sup> June 1913, n. 37, p. 424.

other maritime cities. But its main limitation consisted in the limited economic resources that the state offered: 40,000 lire in the first year, 60, 000 lire in the second year and 80, 000 lire for the third year. A limit that the MP Francesco Perrone publicly criticized during the discussion of the bill approved in the House of Representatives on the 29<sup>th</sup> of May, 1914. On that occasion, in fact, Perrone, while approving the initiative, pointed out how the allocated sums were just enough «for the maintenance of a couple of ships». So, the deputy affirmed:

A few years ago in Venice, for the first time, groups of children were taken away from the street and vice; then this example was imitated in the city of Naples, so that in the maritime cities of the Kingdom a desire sprang, to establish new training-ships. There was no reason for the precedence of Venice or Naples, and it was necessary that even Genoa, Taranto, Spezia, Livorno, Palermo, Messina could have these training-ships<sup>36</sup>.

The law, which consists of a few items, established that the Council of the Action was formed by the Minister of the Navy, who was also the President; two delegates, one from the Home Office and one from the Ministry of Education; one delegate of each legally recognized training-ship; and by those extraordinary members that could be appointed by decree, on a proposal of the Minister of the Navy. These procedures demanded time, but at the end of November 1914 all the appointments had been made and on the 2<sup>nd</sup> of December the council met for the first time<sup>37</sup>. It approved the program for the year 1915, but had to cope with the first problems caused by the European war, hospitalizing some orphans of fishermen of Fano who had died due to the outbreak of some loose cannons that the Austrians had scattered in the Adriatic<sup>38</sup>. After the entry of Italy into the conflict, the need to provide for the orphans of war became more urgent.

Meanwhile, attempts were made to extend the network of ships to other cities: even before the law of 1914, in fact, non-profit organizations of Genoa, La Spezia, Livorno, Civitavecchia, Taranto, Bari, Messina, Palermo and Cagliari sent requests to the Ministry to obtain abandoned ships. The directors of the Institution, so, tried to create a new training ship in Livorno.

Around the same years, the Committee of the seaside and mountain holiday camps for poor students of municipal schools of Rome showed its interest in the model of training ships, hypothesizing the creation of a summer camp for scrofulous children on an old abandoned ship<sup>39</sup>. This idea, already shown for the first time at the International Congress of Social Hygiene, held in Rome in 1912, was the subject of an assessment by a medical commission (formed by professors

<sup>36</sup> See *Atti Parlamentari. Camera dei Deputati. Legislatura XXIV. Prima sessione. Discussioni. Tornata del 29 maggio 1914*, p. 3434.

<sup>37</sup> Levi Morenos, *L'Opera nazionale di Patronato per le Navi Asilo nel 1915*, cit., p. 7.

<sup>38</sup> *Ibid.*, p. 8.

<sup>39</sup> The fact is reported in F. Di Donato, *Una nave sanatorio per fanciulli*, «I diritti della scuola», n. 38, 29<sup>th</sup> June 1913, pp. 58-59.

D'Anna, Romanelli, Zannelli, Silvestri, D'Ermo, Melis and Vecchi), who approved it, arguing that it responded «perfectly to the modern concepts of hygiene and therapy». A positive assessment came even from some clinicians and hygienists including professor Murri and the doctors Quirico and Badaloni. Some doubts were, instead, expressed by the professors Santori, Lustig, Sclavus and Gualdi.

5. *The training ships in the 10's and 20's: the prevalence of military education until the assimilation to the Opera Balilla*

In the middle of the second decade of the century, the movement of the training ships was receiving a new life but it was moving away from its original path, i.e. the Anglo-Saxon model of training ships that had found a substantial emulation in Garaventa's ship. In this experience, the re-education of corrupted young people with criminal record or of abandoned children without means of subsistence was fundamental. Now, instead, the focus was on the young people's military education, so that they were appropriately selected to become the new fleet of a strongly nationalist, imperialist and militarist State. It should be considered, in fact, that the law of the 21<sup>st</sup> of June, 1914 was issued in the same period of the Libyan war and of the outbreak of the Great War, two circumstances that had obliged the Italian ruling class to face other priorities. A contemporary, Giuseppe Squarciapino, noticed this aspect and, tracing a historical profile of the movement of the training ships, wrote in 1914:

If from a *pedagogical* point of view, these institutions seem to be complete; if for the purpose of the socialization of the educational process and of the vocational culture, they [...] represent the school-types to which [...] other social forms of school have to adapt, if they want to fulfill their aim; the training ships have also their weak side, that we must point out in the hope that those who orgainse them, are persuaded to repair. It is true that the interest of the State is the representation of the real needs of the citizens; but it has given a unilateral address to the institution; that better responded to the interests of the State [...] This is testified by the content and the tone of the opening speech for the training ship «Caracciolo» by the then Minister of Marine, who expressed the conviction to adopt military organization for those schools<sup>40</sup>.

Some clear demonstrations of this fact were, according to Squarciapino, the exclusion from the training ships of the most difficult guys, the non-nationalization of Garaventa's ship «Redenzione» and the poor integration of the training ships with other similar institutions. A consequence of all this, added the scholar, was not only the disregarding of the social recovery of difficult

<sup>40</sup> Squarciapino, ...*coi remi e con le vele. Le "Navi-Asilo" e l'educazione marinaresca in Italia*, cit., p. 39.

young people, but also of another aspect very important for Levi Morenos: the training of future fishermen. Squarciapino wrote:

This exclusion was underlined also by the prof. Levi Morenos, who tried to remedy it. In fact, in the report he read during the first session of the Federal Council of the National Patronage of training ships and related institutions (25<sup>th</sup> May 1913), he proposed: a) to use the national Orphanage «V. E. III» for the fishermen's orphans in Porto d'Anzio [...]; b) to use the National kindergarten for the Italian sailors' orphans in Florence as an institution for the selection of all those orphans who, despite being seafarers' sons, had not the physical abilities and moral dispositions to follow their father's profession [...] But the proposal, as you can see, is for now an exclusively personal effort by prof. Levi Morenos to give the institution a varied character, more appropriate to pupils' individual attitudes, as it was at the beginning<sup>41</sup>.

It was not a coincidence that a few years later, in November 1916, the Venetian professor, participating in the popular education congress in Milan, presented the first project for the creation of a new institution committed in the establishment and co-ordination of schools for the seafarers' professional training: in this way, the «Consorzio delle Scuole Professionali per le Maestranze Marittima» was established, become moral institute by the decree in 1920. Objectives of the new institute were the promotion and coordination of preparatory elementary schools for illiterate adults and popular schools for the workers, as well as special courses for minors to prepare them to obtain the license for motorboats<sup>42</sup>.

It should be added that, a few years later, also the «Scilla» was accused of over-militarization. Such accusations, however, did not come from pedagogical environments, but from a politician. In the autumn of 1920, in fact, the anarchist from Campania, recently moved into the area of Chioggia<sup>43</sup>, Arturo Celentano, denounced the alleged mistreatment of young sailors, a fact which pushed the director of the «Scilla», Mamerto Camuffo, to publish an article on the local press in which he strongly denied any wrongdoing and called for the establishment of a commission of inquiry, composed of personalities of the city government (appointed by the Prefect, the Royal Commissioner of the City, by the Commander in chief of the maritime activities, the Federation of the workers of the sea and the National Institution of Patronage for the civil and religious care of the orphans of the sea), to protect the name of the school and its leaders<sup>44</sup>.

Meanwhile, at the beginning of the twenties there was legislative news: the topic of the training ships was reorganized by the decree no. 1085 of the 8<sup>th</sup>

<sup>41</sup> *Ibid.*, p. 40.

<sup>42</sup> *Il Consorzio delle Scuole Professionali per la maestranza marittima*, Roma, Cooperativa Tipografica «Castaldi», 1924, p. 3.

<sup>43</sup> Archivio Centrale dello Stato, Ministero dell'Interno, *Casellario politico centrale*, b. 1231.

<sup>44</sup> A copy of the article, entitled *Per la tutela del decoro della nave "Scilla"*, can be found in the correspondence sent by Mamerto Camuffo to Luigi Luzzatti, preserved in the Istituto Veneto di Scienze, Lettere e Arti di Venezia, Archivio Luigi Luzzatti, *Corrispondenza*, Fascicoli per corrispondenti.



June 1919 and its Regulation approved by Decree no. 129 of 15<sup>th</sup> January 1925. After a new legislative intervention, the decree 664 of the 15<sup>th</sup> of April 1925, they took the name of School Ships Marinaretti. Everything was about to change with the totalitarian grasp of the fascist regime in the second half of the twenties. The training ships became object of interest for the Opera Nazionale Balilla (ONB) and its leader, Renato Ricci, who had already fixed his eye on rural schools<sup>45</sup>.

So, in 1928 took place the training ships Marinaretti and the maritime Orphanage of Anzio Vittorio Emanuele III passed to ONB. The characters who had linked its name to the most important training ships were dead or driven out of the government. David Levi Morenos had disappeared in 1925, but before he changed his political feelings that from the initial liberal democratic positions had become nationalistic and then fascists. Giulia Civita Franceschi was removed from her office in 1928, shortly before the decree, one of her correspondent, the writer Vittorio Augusto Vecchi, known under the pseudonym Jack la Bolina, wrote to her concerned about «the bad impression» he had for the transfer of the training ships to the ONB, the result of a politics of every kind of assimilation of a centralizing state<sup>46</sup>.

The last act before the fall of Fascism was the Law of the 1<sup>st</sup> of July 1940 which suppressed the training ships and established in Sabaudia the Maritime School Caracciolo of the Italian Youth of the Littorio.

<sup>45</sup> See C. Betti, *L'Opera nazionale Balilla e l'educazione fascista*, Firenze, La Nuova Italia, 1984, p. 136.

<sup>46</sup> Letter of the 21<sup>st</sup> August 1928 quoted in Valeriano, *Biografia di Giulia Civita Franceschi*, cit., p. 85.



# Music as the Educational Mean in the Making of the «Socialist Man»: Music Education in Primary Schools of Croatia (1945-1965)\*

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**ABSTRACT:** The task of education and the school system in the first two post-war decades of the Communist Party rule in Croatia was to create “all-round developed socialist men” who would suit the community’s interests by their characteristics. The whole teaching process should have been synchronised to the politics of the ruling class, and to transmit by the school system the ideological principles to younger generations and thus guarantee the implementation of party directives. The curricula in primary teaching proscribed the realisation of very ambitious aims and tasks. A new concert public belonging to the widest working layers of people should have been educated by music teaching, music should have been made a cultural need for all citizens of the country. Such a projection was hardly achievable. The discrepancy between high art and wider layers of society, also visible in the area of music education, could not have been surpassed quickly and easily. The few and insufficiently professionally trained and competent teachers’ personnel did not succeed to adapt quickly enough to ambitious curricula and the educated public’s demands. Enthusiasm and belief in new art’s tasks helped a great effort to be put in the attempt to bring music closer to the young, but despite all the anticipated music education results were humbler than expected. Based on the curricula and cultural and pedagogical magazines texts, this article has offered an insight into the aims and tasks of music education and by using archives documentation and personal testimonies it has considered the results of their implementation in the teaching process.

**EET/TEE KEYWORDS:** Primary School; Teaching process; Musical education; Socialism; Communist Party; Croatia; XX<sup>th</sup> Century.

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After the end of the Second World War, the first years of the Communist Party (further on: CP) in Croatia<sup>1</sup> were characterised by the establishment of the new order based on the rule of the working people. The conception of the construction of socialism excluded the possibility of a multi-party system and the division of power which was held in the hands of Josip Broz Tito and the Politburo of the Central Committee of the Yugoslav Communist Party. The CP created the whole political strategy, from the internal, external, economic to the cultural policy. The aim of the construction of socialism was the transformation of the society based on Marx's theoretical principles of historical materialism and the historical experience acquired in the National Liberation War (further on: NLW) and revolution.

To achieve the goal of forming a better and more just society, the people's awareness should have been changed and their habits reformed. The desirable man, who would by its characteristics suit the community's interests<sup>2</sup>, was tried to be created through educational and cultural institutions. The educational politics task was «[...] education of an all-round developed socialist person, built up in the spirit of our new social ethics, patriotic and freedom-loving, physically developed and strong, with a developed working consciousness and abilities»<sup>3</sup>. The monopoly it had over decision making in all fields of social life enabled the CP to define a new educational concept in line with its own vision and the control and guidance of the educational system transformation process.

The changes in the society structures resulted in changes of aims, tasks, contents, organisation and methods of the teaching profession. The teaching process should have been suffused by the 'new spirit', the Marxist-Leninist ideology which would generate the future common conscience of the world's inhabitants<sup>4</sup>.

Since only young persons from wealthy urban families were educated in the pre war period, the new authority encouraged the education of children from less opulent families, workers and villagers – «ideologically and professionally shod future socialist people»<sup>5</sup>. «Methods of dogmatic lecturing, typical for the old,

<sup>1</sup> Croatia was a republic of the federally organised Yugoslav state – Federal National Republic of Yugoslavia, consisting of six socialistic republics and two socialistic autonomous regions.

<sup>2</sup> I. Hofman, *Osnovno i srednje obrazovanje u Jugoslaviji 1945-1952* [Primary and Secondary Education in Yugoslavia 1945-1952], in B. Doknić (ed.), *Kulturna politika Jugoslavije: 1945-1952* [Yugoslav Cultural Politics: 1945-1952], Beograd, Arhiv Jugoslavije, 2009, p. 68.

<sup>3</sup> S. Pataki, *Uvod u op u pedagogiju* [Introduction to General Pedagogy], Zagreb, 1949, p. 37.

<sup>4</sup> M. Najbar-Agičić, D. Agičić, *Nastava povijesti u Republici Hrvatskoj i njezina zlouporaba* [The use and misuse of history teaching in 1990's Croatia], in S.P. Ramet, D. Matić (edd.), *Demokratska tranzicija u Hrvatskoj: transformacije vrijednosti, obrazovanje, mediji* [Democratic Transition in Croatia. Value Transformation, Education, Media], Zagreb, Alineja, 2006, p. 173.

<sup>5</sup> T. Šarić, *Đački domovi u Narodnoj Republici Hrvatskoj 1945-1954 – prosvjetne i odgojne ustanove ili 'azili za prebranu i noćenje'?* [Pupil's dorms in the People's Republic of Croatia from 1945 to 1954 – educational institutions or 'food and bed asylums?'], «Časopis za suvremenu povijest», n. 3, 2013, p. 442.

bourgeois school» should have been surpassed and replaced by new methods of acquiring teaching materials by observing facts and based on the experience of life inside a society<sup>6</sup>.

However, the starting points for the educational work were very unfavourable. The percentage of illiterate inhabitants was high and the schools network undeveloped. That is why general educational courses were organised throughout the country, while schools, national universities and pupils' dorms were opened. The number of teachers was meagre and they were insufficiently educated to teach. Their work was arbitrated by state organs and they were expected to have a powerful and strong ideological and political orientation<sup>7</sup>.

The basic pedagogical categories which represented the guarantee for carrying out the party's directives were the socialist idea and the political aspect of the teaching process. Teachers should not have only been lecturers, but social workers and educators. Their work meant the transfer of knowledge in which most of the contemporary social norms and values were redefined: educationalists should have educated the young generations in the spirit of the Yugoslav socialist patriotism, love toward the country and its people, in the spirit of internationalism. Education should have put an end to chauvinism, national and racial intolerance and discrimination, and act in the spirit of collectivism and a healthy, true friendship among people, proclaim the ideas of fraternity and union among Yugoslav nations and nationalities, the respect of equality and freedom<sup>8</sup>. The young generation should have been raised in the spirit of loyalty to the socialist homeland, included in the group of politically aware citizens, loyal to the ideological values of the political system.

The educational politics promoted the attitude according to which there were not apolitical school subjects devoid of ideas, but that each had its specific ideal and educational possibilities which should be learned and applied in working with pupils<sup>9</sup>. Although all subjects were expected to make a contribution to the concept of the socialist idea and the political aspect of the teaching process, a group of national subjects, including the mother tongue, history and geography, but also music education – had a particularly important role<sup>10</sup>.

In the first two post-war decades the strings between the spheres of music education in primary schools and ideologies were very strong and undisguised. The educational politics actors used curricula to place the ideas and attitudes

<sup>6</sup> D. Franković, *Bitna obilježja socijalističke idejnosti i političnosti nastave* [Important Characteristics of the Socialist Idea and the Political Aspect of the Teaching process], Zagreb, Pedagoško-književni zbor, 1977, p. 12.

<sup>7</sup> Hofman, *Osnovno i srednje obrazovanje u Jugoslaviji 1945-1952* [Primary and Secondary Education in Yugoslavia 1945-1952], cit., p. 81.

<sup>8</sup> *Ibid.*, p. 69.

<sup>9</sup> Franković, *Bitna obilježja socijalističke idejnosti i političnosti nastave* [Important Characteristics of the Socialist Idea and the Political Aspect of the Teaching process], cit., p. 155.

<sup>10</sup> S. Koren, *Politika povijesti u Jugoslaviji* [Politics of History in Yugoslavia (1945-1960)], Zagreb, Srednja Europa, 2012, p. 68.

about the music education aims and tasks. Their efforts were supported by texts published in pedagogical and cultural magazines<sup>11</sup> of the time. The articles explained details from the curricula, the aesthetic basis of music education typical for the new, socialist man were formulated, the educational role of the school was interpreted and the advancement of education stimulated. The contemporary archives materials which have been treasured consisted of numerous letters, reports, meeting minutes, seminars and papers, and they are valuable documents of that time which have enabled the insight in the situation occurring in schools in different parts of Croatia, as well as in the results and consequences of the implementation of new policies in music education.

The insight in the archival materials, curricula and articles from reviews and magazines has been complemented in this paper using oral history and the narrators'<sup>12</sup> personal experience whose testimonials indicate a variety of experiences and memories about the music education during socialism.

### *The role, aims and tasks of music education*

The political imperative in the socialism's formative years (1945-55) was a strong institutionalisation of all forms of artistic creativity and national enlightenment. The control and guidance of the whole intellectual creativity, culture and school system, including music activities, was conducted by the Agitprop – Department for the Agitation and Propaganda – in line with the obligatory political and party line. The Agitprop was part of the Central Committee of the Yugoslav Communist Party<sup>13</sup>.

<sup>11</sup> Articles from the magazine «Muzičke novine» (1946), «Kulturni radnik» (1951-1965) and «Muzika i škola» (1956-1965) were used in this paper.

<sup>12</sup> Ten narrators took part in the research who attended school in the two first post-war decades in different parts of Croatia. The region of their origin has been noted down in references. Their names and the names of towns and villages they were talking about are withheld by mutual agreement.

<sup>13</sup> Through its bodies (Commission for Schools, the Department for the Ideological-Educational Work and the Department of Education), the Agitprop formulated and gave direction to the educational politics. The Ministries of Education and the educational departments of the National Boards dealt with its implementation and objectification. More on Agitprop see: T. Šarić, *Djelovanje Agitpropa prema književnom radu i izdavaštvu u NRH 1945-1952* [Activity of the Agitprop in Regard to Literary Work and Publishing in the People's Republic of Croatia in 1945-1952], «Radovi – Zavod za hrvatsku povijest», n. 42, 2010, pp. 387-423; Lj. Dimić, *Agitprop kultura. Agitpropovska faza kulturne politike u Srbiji* [Agitprop culture. The Agitprop Phase of the Serbian Cultural Politics], Beograd, Rad, 1988; B. Kašić, *Marxizam-lenjinizam i KPJ 1945-1950 (Između programatskog htijenja i ideologijske funkcije)* [Marxism-Leninism and the CPY 1945-1950 (Between the programmatic Volition and the Ideological Function)], «Povijesni prilozi», vol. 6, n. 6, 1987, pp. 139-215; S. Koren *Politika povijesti u Jugoslaviji* [Politics of History in Yugoslavia (1945-1960)], Zagreb, Srednja Europa, 2012; M. Najbar-Agičić, *Kultura*,

The new society's task in the field of culture and art was to create authentic, socialistic culture and art products, adequate to the form of social and political system based on the authority of the working people. Art should have served the young's education and the renewal and construction of the homeland, as well as be accessible to wider consumers' circles.

The socialistic culture's programme was established at all levels in line with the socialist realism pattern. Its concept had the imperative demand from artists to concretely describe social reality and evaluate social occurrences in line with the party's needs. Art, including music, had an active role in the formation of the new society as a mass educational mean for the aims of the political thoughts sphere. Its function was to agitate, educate, and its aim was to transfer the ideological discourse into the artistic language<sup>14</sup>. Special attention was paid to vocal music, that is any music which could successfully awake with its content the national conscience or evoke memories of the NLW.

One of the cultural politics' priorities in the field of music was education. The tendency of the post-war cultural politics' was to stop being only a prerogative of wealthy citizens' 'noble education'. Music should have been brought closer to the children and the young, especially to those belonging to poorer, worker's families with a relatively low cultural standard. Quality resources of art creations should have been made accessible to everyone, music should have been the part of the cultural growth of each educated man, and all should, regardless of their predispositions, have the right to develop their artistic talents<sup>15</sup>.

Music education started in the first grade of primary school<sup>16</sup>. In the first post-war years, the music education's aim in primary schools was to develop hearing, voice and pronunciation and to train pupils for solo and chorus singing, to stimulate young people's interest for music and to develop aesthetic and social components of their personalities. The curricula anticipated mostly unison singing, and where possible two-part singing, of national and battle songs. Songs were learned 'by ear', while students were encouraged to create their own melodies for adequate children, national and battle textual patterns. In

*znanost, ideologija: Prilozi istraživanju politike komunističkih vlasti u Hrvatskoj od 1945 do 1960 na polju kulture i znanosti* [Culture, science, ideology. Contributions to the Research of the Policy of the Communist Government in Croatia from 1945<sup>th</sup> to 1960<sup>th</sup> in the Field of Culture and Science], Zagreb, Matica hrvatska, 2013.

<sup>14</sup> More about the role of music in the Croatian post-war society in E. Krpan (ed.), *Hrvatsko društvo skladatelja, 60 godina* [Croatian Composers' Society, 60 years], Zagreb, Hrvatsko društvo skladatelja i Cantus d.o.o., 2005; T. Tomažić, *Opasne veze: glazba i politika u Zagrebu od 1941 do 1952* [Dangerous relationships: Music and Politics in Zagreb from 1941 to 1952], in E. Sedak (ed.), *Između moderne i avangarde. Hrvatska glazba 1910-1960* [Between the Modern and the Avant-garde: Croatian music 1910-1960], Zagreb, Hrvatsko muzikološko društvo, 2004., pp. 71-84.

<sup>15</sup> N. Hercigonja, *Napisi o muzici* [Inscriptions about Music], Beograd, Umetnička akademija u Beogradu, 1972, p. 308.

<sup>16</sup> In the first post-war years music education in primary school was conducted with the title «Singing». In the 1951 Curriculum the subject's name changed in higher grades into «Music Education».

1948 quite ambitious demands of elementary music education were introduced in music education already in the third grade. Pupils were introduced to the notion of staff, differentiating the duration of notes, their tonality, and different measures<sup>17</sup>.

After the introduction of the mandatory eight-year school system in 1951<sup>18</sup>, all the usual music-educational areas<sup>19</sup> were present in teaching programmes along with singing and developing literacy. Those areas included: listening to music led «according to possibilities» owned by a certain educational institution, creativity and the acquisition of various concepts linked to music culture. In the first three grades, the emphasis of music education was on singing, music perception and the application of the perceived. If possible, dictations and creative activities were introduced in the fourth grade, while in schools where teachers were not sufficiently trained, such contents were replaced by singing adequate national and patriotic songs<sup>20</sup>. Occasional listening to records, radio broadcasts<sup>21</sup> or concerts, as well as the development of literacy were envisioned in the fifth grade. Pupils should have been taught about solmisation, the alphabet, major and minor scales, recognising intervals by listening, etc. The Tonic-Solfa method, the numerical method (Galín Paris Chev  system), modulators and phonomimics<sup>22</sup> were envisaged as a help to the acquisition of new music knowledge.

In line with the new political orientation directed toward worker self-management and social management, state administration was reorganised in the fifties, and thus was education, culture and science management. School

<sup>17</sup> *Nastavni plan i program za osnovne škole* [Primary Schools Curriculum], Zagreb, Ministarstvo prosvjete NRH, 1948, pp. 59-63; *Nastavni plan i program za osmogodišnje škole i niže razrede gimnazije, osnovne škole i produžene tečajeve* [Curriculum for Eight Year Schools and Lower Grades of Grammar Schools, Primary Schools and Extended Courses], Zagreb, Ministarstvo prosvjete NRH, 1950, pp. 89-62 and 89-90.

<sup>18</sup> After a gradual growth of six-year schools into eight-year ones, this curriculum came into force only in the 1954/1955 school year. The transfer to eight-year schools was gradual and different: four-year schools gradually grow into eight-year ones, lower grammar school was abolished and it joined eight-year schools. In few occasions curricula were made for the needs of the transformed eight-year school.

<sup>19</sup> Except playing instruments which was introduced by the 1958 Curriculum.

<sup>20</sup> Music education was taught by teachers in both lower and higher grades of primary school.

<sup>21</sup> Through the *School Radio*, Radio Zagreb was broadcasting programme cycles the aim of which was to bring songs closer to pupils and help them in their rehearsals with their class teacher or with the music education teacher.

<sup>22</sup> Tonika – do [Tonic-Solfa] is a method for mastering intonation developed in Germany by Agnes Hundoeegger. Phonomimics is a helping mean for imaging scale grades and tone intervals. It is based on the ancient and medieval technique of visualizing songs' lines by arm movements (Cheironomy). *Nastavni plan i program za osmogodišnje škole i niže razrede gimnazija* [Curriculum of the Eight-Year Schools and Lower Grades of Grammar Schools], Zagreb, Ministarstvo prosvjete NRH, Odjel za školstvo, Školska knjiga, 1951, pp. 158-165; *Nastavni plan i program za narodne četverogodišnje škole i niže razrede osnovne škole* [Curriculum of National Four-Year Schools and Lower Grades of Primary Schools], Zagreb, Savjet za prosvjetu, nauku i kulturu NRH, Školska knjiga, 1954, pp. 80-83.



boards were founded in primary schools – they were social management organs, with the aim of including not only teachers, to whom education was a professional duty, but citizens and political organisations in the formation of better working conditions in schools. Since 1956, after the abolition of the Agitprop apparatus, the work in the field of science, culture, art and education in Croatia was guided by the Ideological Committee of the Central Committee of the League of Communists of Yugoslavia.

Unlike the first post-war curricula in which professional terminology was mostly used in a way that was hardly understandable, while aims and tasks were changed year after year, by the end of the fifties education politics creators detected critical places, corrected the music education aims and revised the tasks of music education teachers in line with the newly gained experiences and needs. In 1958 the drawing of the music education concept in primary schools was created on a national level, and it resulted in the curriculum implemented in 1960.

Along with all the fields of which the old curriculum consisted of, in the new curriculum the discipline of instruments playing was introduced for the first time<sup>23</sup>. In the first three grades of primary school «Music Education» was based on listening, singing, playing on children's school instrumentation and on creative work. From the fourth to the sixth grade pupils' music perception was 'awaken', music education thus consisting of the education of hearing, education of taste and education of independent expression. The music education focus in the seventh and eighth grade was the acquisition of instrumental music basis through meeting musical instruments and listening to music (gramophone records, radio, concerts, operas, etc.). The teaching material belonging to former grades was expanded by listening perception, learning about new instruments, types and forms of music, as well as music professions, personalities, institutions, organisation of music performances, etc.<sup>24</sup> Special attention was paid to the cultural-educational school's activity: the organisation of school celebrations and concerts, choirs and instrumental bands festivals, music excursions, competitions, editing school music magazines, encouraging the mutual visits of schools' music groups, etc.<sup>25</sup>

In the second, revised issue of the 1964 curriculum and the third 1965 one, teaching materials and music activities were divided into three stages. In the first two stages (from the first to the third grade and from the fourth to the seventh grade) the music education central element was singing songs which were adequate to children's developmental ages regarding range, text and aesthetic experience. In the final stage the emphasis was placed on singing songs of a

<sup>23</sup> *Odgojno-obrazovna struktura. Osnovna škola* [Educational Structure. Primary School], Zagreb, Savjet za prosvjetu NRH, 1960, pp. 184-197.

<sup>24</sup> *Osnovna škola – Odgojno-obrazovna struktura* [Primary School. Educational Structure], Zagreb, 1960, p. 26, pp. 184-197.

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

socially engaged content, including the republican and state anthem and other songs of a ceremonial character. The area of creativity implied work on creative activities at all stages. Teachers were suggested to link them to movement, miming and visual arts, to use oral improvisations, as well as tone improvisations on percussion instruments, text improvisations, melodies, to compose shorter music units, etc.<sup>26</sup> The area of the development and education of hearing in the first stage was focused on the development of music dispositions of pupils which should have been prepared to awake the sound, rhythm and melodic conceptions and to master music literacy using rhymes, stories, imitating rhythms from the nature and work, recognising noises, voices and tones from the environment, remembering and repeating rhythm and melodic and rhythmic motives and phrases, recognising songs, etc. The second stage started with the development of literacy, basic theoretical knowledge about rhythm and metre was acquired. In the third stage, theoretical knowledge was expanded and complemented with musicological contents<sup>27</sup>.

Music education aims and tasks prescribed by the curricula were additionally explained in texts published in cultural and pedagogical reviews in which prominent musicians, often deputed by the party, gave ideological guidelines about the correct way of teaching. In these texts, the basic symbolic value in the music education discourse was the democratisation of music or its popularization. An unavoidable leitmotif of the music education narratives was the need to surpass the class, gender and intellectual barriers in music education, the criticism of urban culture which considered it a ruling class privilege and the awareness and thankfulness to the new authority which gave everybody the right to develop their music talents. A stress was put on the fact that in old Yugoslavia music education was reduced to expensive private lessons which was usually based on a mercantile basis and that the few music schools were mostly attended by children from wealthier urban circles. Contrary to the earlier music-educational practice in which the taste of musically uneducated users coming from chosen layers of society was being pleased, imposing on music the conservative fences of exclusivity and individualism, the socialist society's aim, it was emphasized, was to change the social structure of the public and professional musicians. Consequently, it demanded a correct «ideal-political reorientation in the spirit of advanced democratic understandings of art and pedagogical activities»<sup>28</sup>.

Music education should have been carefully included into the general educational system. Attention should have been paid not to separate it from the general educational procedure and not to make it an end in itself which would, as it was thought, lead to a premature, artistic professionalism, inadequate to

<sup>26</sup> *Odgojno-obrazovna struktura. Osnovna škola* [Educational Structure. Primary School], Zagreb, Savjet za prosvjetu NRH, 1965, pp. 222-234.

<sup>27</sup> *Ibid.*

<sup>28</sup> B. Kolenc, *Zadaci muzičkog odgoja* [Music Education Tasks], «Muzičke novine», n. 6, 1946, p. 4.

the formation of the new socialist man<sup>29</sup>. Due to the teachers' wish to satisfy their own ambitions by sturdily practicing pretentious programmes, they were guided not to fall into the trap of artism while rehearsing soloist or chorus appearances because eventually it could result in the pupils' repugnance toward the subject and chorus singing<sup>30</sup>. Teachers' attitudes should have been based on the Marxist based discourse about art, that is on conceptions that music was not an isolated phenomenon, departed from the totality of a person's life interests, but that it had always been created under specific circumstances, expressing the opinions and values of the social environment in which it developed. Pupils should have been made aware of the fact that the new authority offered artists exceptional working conditions so to awake the pupils' «...national pride and socialist patriotism for the pupil to realise that the most prominent creators intended to make music a general human good which will not know boundaries among people, thus developing pupils' sense for creative democracy and true internationalism; to let music have such an influence on pupils' positive quality changes which would always adorn their personalities, even later in life, of civilised citizens, aware activists in the formation of a higher standard of our music and cultural future»<sup>31</sup>. By glorifying the new authority's achievements, it was attempted to make its moves the musicians' personal beliefs, as well as the teachers and their pupils' beliefs.

Teachers were suggested to devote equal time to all pupils, both to gifted and those with less developed talent<sup>32</sup>, during music lessons. They were warned to mark pupils regarding their commitment, not predispositions<sup>33</sup>.

A special relationship was founded regarding the music education of young people in religious institutions. The church, as the only institution belonging to the old civil society, offered shelter to those who felt excommunicated because of the programme politics of the new order. In the early post-war years, religious education was allowed in state schools, but was not compulsory, while the authority used different forms of pressure in their anti religious education propaganda, until it was displaced from state schools in 1952<sup>34</sup>. Even primary

<sup>29</sup> Z. Grgošević, *Muzički odgoj djece* [Music Education of Children], «Kulturni radnik», n. 12, 1951, pp. 618-620.

<sup>30</sup> J. Požgaj, *Ličnost muzičkog pedagoga kao dominantni odgojni faktor* [The Figure of the Music Pedagogue as a Dominant Educational Factor], «Muzika i škola», n. 4, 1959, p. 69.

<sup>31</sup> B. Antonić, *Muzički odgoj u predškolskim ustanovama i školama* [Music Education In Preschool Institutions and Schools], «Kulturni radnik», nn. 1-2, 1965, p. 7.

<sup>32</sup> In the half term and end-of-school reports which Primary schools sent to the Ministry of Education it is evident that the average grade did not differ from other subjects' average grades and that usually the grade was good (the middle grade in a grading system from the grade insufficient (1) to excellent (5) HR HDA-291, MPRO NRH, 35, Polugodišnji i godišnji izvještaji o uspjehu (Osnovne škole) *Osnovna škola* [Half Term and End-of-School Reports on Achievement (Primary Schools) Primary School], 1958.

<sup>33</sup> *Osnovna škola – Odgojno-obrazovna struktura* [Primary School – Educational Structure] 1960, p. 194.

<sup>34</sup> M. Akmađža, *Katolička crkva u Hrvatskoj i komunistički režim 1945-1966* [The Catholic

school's pupils going to church, singing in the choir and learning how to play the organ by nuns became undesirable with time. It was thought that by visiting religious institutions children could succumb to beliefs considered backward, reactionary and petty-bourgeois.

*Music teacher – ideologically committed, party minded and fervent musician*

The basic precondition for a well accomplished work by teachers of music education was the true affection for music which they had to pass on to future generations. A music education teacher should have been «[...] by education and culture a serious musician and pedagogue, and by heart a fervent musician who can live out musically even at the level of an 'ordinary man' of good will!»<sup>35</sup>. In the first post-war years, their ideological commitment and party mindedness, the clear expression of social political attitudes were considered criteria for their patriotism, political awareness and personal relations toward their profession.

Music education teachers did not differ from other teachers regarding their social status, they lived modestly and their life standard was relatively low<sup>36</sup>. According to the reports submitted to the Agitprop by the responsible educational inspectors, their social-political engagement was insufficient. They used numerous excuses to avoid the social and political engagement, they avoided political activities and learning on purpose, were indifferent, escaped from all duties which were not directly linked to their profession. They rarely

Church in Croatia and the Communist Regime 1945-1966.], Rijeka, Otokar Keršovani, 2004, pp. 82-93.

<sup>35</sup> Požgaj, *Ličnost muzičkog pedagoga kao dominantni odgojni faktor* [The Figure of the Music Pedagogue as the Dominant Educational Factor], cit., pp. 70-71. In the book *Metodika muzičke nastave*, Jože Požgaj has stated other characteristics which should be owned by a good music education teacher: except for a thorough professional knowledge and pedagogic-methodological qualification, they should nourish the need of listening to good music, of piano improvisations, feel a true elation during conduction so to transfer it to their pupils, they should be aware of the importance of music teaching in schools, introduce beauty and happiness in it, like good pedagogues, see their pupils as human beings, wishing for life, happiness and beauty; in the communication with their pupils they should use a lively and positive tone, have authority over them, but be liked by them, their appearance and behaviour should show their sophisticated aesthetic taste, they should be observing and nice among colleagues teachers, open to older and more experienced teachers' advice. They should keep pace with advances in literature and other art branches, contemporary pedagogy efforts and be familiar with the social-historical problems of their time. More in J. Požgaj, *Metodika muzičke nastave* [Methodology of Music Education Teaching], Zagreb, Nakladni zavod Hrvatske, 1950, pp. 20-21.

<sup>36</sup> HR HDA 1220 CK SKH, Agitprop, 12, *Izveštaji, 1949, Ideološki odgoj prosvjetnih radnika. Ideološko – odgojni rad sa kulturnim radnicima* [likovni umjetnici, muzi ari, književnici] [Reports, 1949, Ideological Education of Educationalists. Ideological and Educational Work with Culture Workers/Visual Artists, Musicians, Writers], *Zapisnik sa sastanka u Ministarstvu prosvjete* [Minutes of the Ministry of Education Meeting].

and unwillingly participated in discussions on party meetings, some of them were not at all familiar with the ideas of dialectic materialism or basis of Marxism and Leninism. Authorities explained their lack of interest by their 'bourgeois origins' and by the fact that they were mostly educated in pre-war years and are thus bearers of old and overcome ideas<sup>37</sup>.

Education instructors and inspectors who were visiting schools found that teaching was not in line with the curricula and educational aims for the socialist society, that teachers were insufficiently familiar with the curricula, thus conducting lessons at their own discretion, and even if they knew them, they did not sufficiently abide by them, but 'redrew' teaching material contents as they thought they should<sup>38</sup>.

Music education was a completely marginal subject, a special school hour was not determined for it in the school timetable, we dealt with it when the teacher wanted to take a break from work and to make us get tired by singing loudly and dancing a country dance (M.L., born in 1943).

To remove these flaws, the Ministry of Education organised different courses in which teachers were taught how to make a connection between what they teach and the social life situation. According to notes from archives documents of this period, it often happened that teachers were seeing ideals in teaching as a separate process, thus missing to explain to pupils the importance of understanding music as a socially conditioned occurrence. They only dealt with proscribed materials without analysing and applying the acquired knowledge which would serve to pupils as a right ideological orientation<sup>39</sup>.

The ignorance in the implementation of ideologies and party ideas was only one of the problems of music education. The main obstacle to its realisation was represented by the lack in personnel. Along with the few educated musicians, the early post-war period education was mostly conducted by unprofessional teachers<sup>40</sup>. In the first post-war years they were educated to a great extent at various shortened courses, one-year schooling where there was no music

<sup>37</sup> *Ibid.*

<sup>38</sup> HR-HDA 1220, 12, Agitprop, 12, Komisija za agitaciju i propagandu 1945-1954. *Izveštaj o školama poslije rezolucije III plenuma CK* [Report on Schools after the Resolution of the Third Plenum of the Central Committee].

<sup>39</sup> For example, in the archives examples have been found of teachers who, after teaching folk music, dedicated time in the same lesson to ideals instead of letting it penetrate the narrative about folklore. HR-HDA 1220, 12, Agitprop, 12, Komisija za agitaciju i propagandu 1945-1954. *Izveštaj o stanju i problemima školstva u 1949.* [Report on the State and Problems in Schools in 1949].

<sup>40</sup> D. Cvetko, *Odgovorni, pedagoški i stručni lik nastavnika muzike i nastavnički odjel kao stvaralac toga lika* [The Educational, Pedagogic and Professional Figure of the Music Teacher and the Teaching Department as the Creator of this Figure], «Muzika i škola», n. 1, 1957, p. 2.

education or it was paid little attention<sup>41</sup>. When accepting candidates at Teacher Schools, neither hearing nor other music abilities were checked<sup>42</sup>.

After coming to the Teacher School of Split, music was a school subject, but the teacher thought that we had some knowledge from primary school... It turned out that he could not rely on our knowledge. However, he did not make a real effort, either, I guess he understood that little could be done. His explanations were fast, he insisted too much on theory to which pupils could not really reply, we had one piano for 100 pupils, we learned a few scales and that was all (M.T., born in 1936).

According to the half term and end-of-year reports which headmasters and school managers submitted to the Ministry of Education, in spite of the regulations, some Croatian schools did not have music education lessons at all, or it was incompletely conducted<sup>43</sup>.

Our teacher did not sing and we did not have music education in today's sense. He tried to teach pupils how to read and write, but neither this was easy because village children were stressed with work in the field and care for the cattle. Even if music education was anticipated by the curriculum – it was completely neglected, I do not remember learning any songs (M.T., born in 1936).

<sup>41</sup> B. Rakijaš, *Muzička nastava u učiteljskim školama* [Music education at Teacher Schools], «Kulturni radnik», nn. 7/8, 1956, pp. 41-42. There were four-year teacher schools in Croatia after the war. In 1952 they became five-year. They educated future general class teachers, and class music teachers for purposes of newly introduced seven-year schools. Special class teachers or music teachers in Croatian primary schools were educated at Schools of Pedagogy, at the theoretical-educational department of the High School of Music in Zagreb and since 1951 at the 7<sup>th</sup> Department of Pedagogy of the Zagreb Music Academy. The 1960 Law on Pedagogic Academies abolished teacher schools and Schools of Pedagogy and introduced instead Pedagogic grammar schools and two-years Pedagogic academies in Zagreb, Split and Pula, followed by other towns. The abolition of secondary teacher schools and the introduction of institutions of higher education in the sixties of the 20<sup>th</sup> century, a dynamic and continuous reform of institutions for teacher trainings began. More in: *Nastavni plan i program za učiteljsku školu* [Curriculum for Teacher Schools], Zagreb, Savjet za prosvjetu, nauku i kulturu NR Hrvatske, 1952; K. Kos, *Muzička akademija u Zagrebu* [The Music Academy of Zagreb], Zagreb, Sveučilište u Zagrebu, 1981, p. 12; *Zakon o pedagoškim akademijama* [Law on Pedagogic Academies], «Prosvjetni vjesnik», vol. 13, 1960; E. Munjiza, M. Lukaš, *Pedagoško-psihološko osposobljavanje učitelja u visokoškolskim ustanovama* [Pedagogic and Psychologic teacher Training in Institutions of Higher Education], «Odgojne znanosti», vol. 8, n. 2, 2006, p. 361.

<sup>42</sup> *Prvi kongres muzičkih pedagoga Jugoslavije* [First congress of Yugoslav music pedagogists], «Muzika i škola», n. 3, 1958, p. 46; Cvetko, *Odgojni, pedagoški i stručni lik nastavnika muzike i nastavnički odjel kao stvaralac toga lika* [The Educational, Pedagogic and Professional Figure of the Music Teacher and the Teaching Department as the Creator of this Figure], cit., p. 2; M. Zuber, *Problemi muzičkog školstva* [The music schools problem], «Kulturni radnik», nn. 3-4, 1956, p. 56.

<sup>43</sup> HR-HDA 1220, 12, Agitprop, 12, Komisija za agitaciju i propagandu 1945-1954. Izvještaj o školama poslije rezolucije III plenuma CK [Report on Schools after the Resolution of the Third Plenum of the Central Committee]; *Nove mjere za stvaranje stručnog muzičkog kadra* [New Measures for the Formation of Professional Music Staff], «Kulturni radnik», n. 2, 1951, p. 477.

The status of music education among other subjects was often considered 'secondary'. Teachers had to cope with the many prejudices, because a lot of parents, especially in villages, were against their children's education, while somewhere they encountered lack of interest and resistance by the sole children:

The young teacher used to say while we were learning notes – who is not interested may go out. She merely uttered the sentence, and we already were – one keeping the goal, the other shooting (Ž.R. born in 1943).

There were not many course books and reference books for teaching<sup>44</sup>. Even the most competent representatives of the profession had contrary opinions about the Tonic-Solfa method which laid a demand on teachers to own specific competences which would represent a help in improving literacy. Some teachers were familiar with it, others were not sufficiently musically literate themselves to understand how to implement such a method<sup>45</sup>, so the implementation of literacy improvement depended on the sole teacher's capabilities.

We did not learn how to write notes, never. Neither could the teacher play something, nor there were any instruments at school (I.B., born in 1942).

We learned notes, but I did not learn any (M.V., born in 1954).

The development of literacy was very humble. We learned about clefs, how to write notes and what the staff looked like, that was all (M.T., born in 1936).

In the music classroom there was a harmonium and a board with staves, we had to have music manuscript books. The teacher would write songs on the board, and we would sing followed by the harmonium. All I learned about music notation, I learned in primary school. The teacher was a real genius, his opinion was very important to all of us. We really put an effort into it (K.M., born in 1948).

Regarding pupils who were more talented and interested in music education, teachers had to cope with a kind of 'competition' which the church directed toward music education at schools. The young from catholic families were learning religious repertoire there, but the communist regime did not show a tendency toward it, in line with its atheistic ideology. The authority was worried by the fact that where children did not have the chance to learn music, they went to the monastery to be taught by abbesses<sup>46</sup>.

<sup>44</sup> Course books and workbooks started to be published at the end of the forties, their authors being music pedagogues, composers and conductors Joža Požgaj, Božo Antonić, Josip Završki and others, but not all schools were supplied with them to a sufficient extent.

<sup>45</sup> HR HDA 1220, Agitprop, 12, Komisija za agitaciju i propagandu 1945-1954. Izvještaj o stanju i problemima školstva na području NR Hrvatske [Report on the State and Problems of the School System of the National Republic of Croatia].

<sup>46</sup> M. Vucković. *Školovanje i raspored. Pomanjkanje nastavnika muzike i zborovoda u našim srednjim učiteljskom školama i KUD-ovima* [Schooling and the Timetable. Lack in Music Teachers and Choir Leaders in our Secondary Teacher School and Folk Ensembles], «Vjesnik», June, 17<sup>th</sup>, 1951, p. 2.

There were no instruments at school. But for us who were music-thirsty there was another side of music education, taking place under the auspices of the church. There we had a piano, the choir, I knew all church songs. Usually the nuns were playing, singing spiritual songs, religion was praised, saints as well (M.T., born in 1936).

I used to visit the church and there we sang a lot, I learned a lot about music there. A lot more than in school, the nuns knew a lot more songs than the teachers, and they could play music. I know I was always asking myself – how come that the paradise virgin is the queen of CROATIANS<sup>47</sup>, where are the others? Why isn't she the queen of other Yugoslav nations – the Serbs, the Macedonians, the Slovene, the Montenegrins... But of course, I did not ask anybody, this was simply not allowed (Ž.R., born in 1943).

Most schools lacked the basic material conditions needed for teaching: not all schools had the tamburitza, the accordion or some other instrument and children's instrumentation, there were no reference books or other teaching literature<sup>48</sup>. The most serious problem was audio means. This made the familiarisation with works of music anticipated in the curricula a lot more difficult. In spite of the popularity of sound reproduction means, not many schools could boast about owning a tape recorder, gramophone, radio receiver and records. In schools which owned them, many pupils met for the first time types of music which were very strange and distant to them:

We had a gramophone at school, the teacher made us listen to classical music records. What should I tell you – it hurt, but you kept your tongue between your teeth and you held on (T.F., born in 1958).

The teacher did not know a thing about classical music literature. I had a gramophone and records at home because my parents were huge music lovers. Once I sang 'Für Elise' to her and she asked me what that was (Ž.R., born in 1943).

A great problem among teachers was represented by personnel management. Music teachers were often employed in more than one institutions, and those more educated and professional wanted to work in larger places, thus opposing working in villages<sup>49</sup>. Head-masters usually thought that music education was the logistics for the organisation of various school celebrations and obligatory performances at the end of the school year, while they were not in the least interested in its educational power. Although the justification of aesthetic education through art disciplines was declaratively one of the assumptions written down in all curricula, teaching education was often looked down on. It was considered that music talent was the privilege of individuals for whom music schools were enough and that music should not have been a general education

<sup>47</sup> The story is about an extremely popular church song *Rajska djevo, kraljice Hrvata* [Paradise Virgin, Queen of Croatsians], its author being the priest Petar Perica.

<sup>48</sup> HR HDA 1598, SP NRH, 145, Zavod za unaprjeđenje školstva. Elaborat o sprovođenju reforme osnovne škole [Elaborate for the Conduction of Primary Schools Reforms] 1963.

<sup>49</sup> HR HDA 1220, CK SKH, Agitprop, 10, Komisija za agitaciju i propagandu 1945-1954. *Podaci o umjetnicima* [Details about Artists].



subject<sup>50</sup>. Sometimes it was reflected in the participation in managing institutions, primary school music teachers were discriminated because of the management and colleagues' ignorance, which meant that they participated in management to a smaller extent than teachers of 'more important' subjects<sup>51</sup>. On the other hand, they were expected to conduct the choir and other extracurricular activities: orchestras, groups of singers, instrumental ensembles, the preparation of pupils for festivals and competitions. Sometimes, such work did not count as teaching hours and was not valorised although it was strenuous and responsible because at every performance the teachers were liable to their colleagues' criticism or the parents' judgement and thus it was avoided by many<sup>52</sup>. School shows were the only cultural manifestation in some smaller places. The participation in formal events, which necessitated practicing of music pieces, was strenuous to pupils and thwarting the conduction of lessons. It also overburdened the already very busy, but few, competent teaching personnel<sup>53</sup>.

Political imperatives imposed that fate and love for the socialist homeland should be a sufficient encouragement for teachers, in spite of all obstacles and financial difficulties, to be ready to perform their vocation with devotion and thus contribute to the construction of the socialist culture<sup>54</sup>. The achievement of this goal proceeded slowly and there were many problems. Despite that, some schools had successful choirs and tamburitza orchestras with numerous membership. In some districts, teachers themselves collected money for the purchase of instruments, records sets used in teaching, they constructed instruments (pipes, rustlers, triangles and other percussion instruments), led choirs, various vocal and instrumental bands performing not only in their central schools, but in various festivals, competitions, etc.<sup>55</sup> Since there was a small

<sup>50</sup> Cvetko, *Odgojni, pedagoški i stručni lik nastavnika muzike i nastavnički odjel kao stvaralac toga lika* [The Educational, Pedagogical and Professional Figure of the Music Teacher and the Music Department as the Creator of this Figure], cit., p. 2.

<sup>51</sup> V. Golob, *Društvena uloga i zadaci muzičkih škola* [Music Schools' Social Role and Tasks], «Kulturni radnik», nn. 1-2, 1965, pp. 32-42.

<sup>52</sup> S. Ećimović, *Muzički odgoj u osnovnoj školi. Vanrazredne i vanškolske aktivnosti nastavnika muzičkog odgoja* [Music Education in Primary Schools. Extracurricular and Out-of-School Activities of Music Education Teachers], «Muzika i škola», n. 3, 1962, p. 71; *Prvo savezno savjetovanje muzičkih pedagoga u Hrvatskoj*, «Muzika i škola», nn. 4-5, 1956, p. 2.

<sup>53</sup> HR HDA 1598, SP NRH 1956-1963, 145, Zavod za unaprjeđenje školstva. Elaborat o sprovođenju reforme osnovne škole 9.7.1963. [The Elaborate about the Conduction of Primary School Reforms, 9 July 1963].

<sup>54</sup> Kolenc, *Zadaci muzičkog odgoja* [Music Education Tasks], cit., p. 4.

<sup>55</sup> HR HDA 1598 SP NRH 1956-1963, 134. *Stanje nastavnog kadra na području kotara Osijek* [The State of Teaching Personnel in the District of Osijek], *Problemi kadrova u odgojno-obrazovnim ustanovama narodnog odbora kotara Rijeka za šk. god. 1961/62* [Personnel Problems in Educational Institutions of the National Board of the District of Rijeka for the School Year 1961/1962]; HR HDA 1598 SP NRH 1956-1964, 145, *Izveštaj upravitelja II Osnovne škole Virovitica na kraju šk. god. 1959/1960* [Report of the Principal of the Second Primary School of Virovitica at the End of the School Year 1959/1962]; *Polugodišnji izvještaj na kraju prvog polugodišta šk. god., 1960/1961*, Osnovna škola Stenjevec Zagreb [Primary School Stenjevec

number of recordings adequate to the children's age, some teachers attempted composing songs for soloists, choirs, etc.

Our teacher was well shod with music knowledge. She was a respected person, a party member, in charge at the district for culture and sport. She was the leader of the school and town's mixed choirs, respected by everybody. When we would practice a new song, the whole village came to listen to it (Z.G., born in 1943).

We had an upright piano in the hall where performances were held, here we had choir rehearsals. Not only did the music teacher play, but other teachers also played the violin, piano, accordion. I guess it was a generation of teachers with an inclination toward music (E.G., born in 1952).

In larger cities some teachers succeeded in their cooperation with theatre houses and other institutions so they held music and stage performances of a narrower extent<sup>56</sup>. However, educational inspectors' reports of the second decade of the socialist rule showed that in some districts, in the second half of the fifties, 70% of the personnel still performed music education unprofessionally<sup>57</sup>. The situation got better at the end of the fifties, especially in the sixties when the first generations of teachers who graduated at music departments of Teachers Colleges started to teach.

*Chorus singing serving the mythologisation of the NLW and the promotion of the idea of collectivism*

The curricula which were effective in the first post-war years showed that since the earliest age, young people were encouraged to empower their political awareness, the feeling of grit, love for the country, work, friendship and the importance of evoking memories of the NLW<sup>58</sup>. In the annual plans, teachers were left with the freedom of choosing songs, but the curriculum suggested a choice of those which could be taught in a certain grade, among which there were many pioneer songs, songs about Josip Broz Tito, the NLW, etc. Thus, for example, in 1948 the songs adequate for singing in lower grades were considered to be, among others: *Oj narode, narode, evo tebi slobode* [Hello, nation, here is

Zagreb]; HR HDA 291, MPRO NRH, 35, *Polugodišnji i godišnji izvještaji o uspjehu* (Osnovne škole) [Half-Term and Annual Reports on Achievement (Primary Schools)].

<sup>56</sup> Such case was, for example, registered in Pula where primary school pupils, in cooperation with the town's musicians, took part in the realisation of operetta performances. L. Duraković, *Ideologija i glazbeni život: Pula 1945-1966* [Ideology and the Musical life: Pula from 1945 to 1966], Zagreb, Hrvatsko muzikološko društvo, 2011.

<sup>57</sup> HR DAPA 829, Arhiv Slavka Zlatica, 3, *Problematika muzičkih kadrova* [Music Personnel Problems]; HR HDA 1598 SP NRH 1956-1963, 134. Izvještaji [Reports].

<sup>58</sup> M. Zuber, *Estetsko-muzički odgoj odraslih* [Aesthetic and Music Education of Adults], «Muzika i škola», nn. 4-5, 1956, p. 11.

your freedom], *Druže Tito ljubičice bijela* [Comrade Tito, white violet], *Mi smo mali pioniri* [We are little pioneers], *Na kordunu grob do groba* [On Kordun long rows of graves], *Drugarska se pjesma ori* [A friendly song is resounding], *Hajd u kolo sada svi partizani* [Let's dance a country dance, partisans], *Budi se Istok i Zapad* [Waking up now East and West], *Padaj silo i nepravdo* [Fall violence and injustice], *Po šumama i gorama* [Trough the forests and mountains], and *Lijepa naša domovino* [Our beautiful homeland], *Ide Tito preko Romanije* [Tito Crosses Romania], *Pjesma mladih graditelja* [Young builders' song] etc.<sup>59</sup>

Later curricula did not suggest teaching particular songs, but it was stated that pupils should have mastered a certain number of ceremonial, mass and commemorative songs such as anthems, the 'Internationale', songs about the Republic, songs about comrade Tito, marches, battle mass songs, mass labour songs, art and folk songs<sup>60</sup>.

These songs had an important and direct role in school shows and celebrations. Manifestations in which pupils performed, being that soloist or chorus performances, were visited by politicians and other important local community representatives, many teachers and parents. Choirs performances, formed by primary school pupils dressed in pioneer<sup>61</sup> uniforms – red scarves and blue (in the first post-war years white) caps, in school halls, adorned with flags and slogans, were mostly held for holidays: on Women's Day, liberation anniversary, Yugoslav national Army Day, Tito's birthday, Republic's Day, Labour Day and on the occasion of other formal events. Instructions on how to mark those days came from the Agitprop and later on from other political structures of authority, while the schools' head-masters had the obligation to deliver the shows' programmes and reports after each manifestation held<sup>62</sup>.

One of the most important characteristics of the narrative about music education in the post-war years was the emphasis put on the idea of collectivism, according to which belonging to the group was recognised and expressed.

<sup>59</sup> *Nastavni plan i program za osnovnu školu* [Primary School Curriculum], 1948.

<sup>60</sup> See, for example *Nastavni plan i program za osmogodišnje škole i niže razrede gimnazija, 1951* [Curriculum for Eight-Year Schools and Lower Grades of Grammar Schools]; *Odgojno-obrazovna struktura. Osnovna škola (1959)* [Educational structure. Primary School (1959)], Zagreb, Savjet za prosvjetu NRH; *Odgojno-obrazovna struktura. Osnovna škola (1960)* [Educational structure. Primary School (1959)], Savjet za prosvjetu NRH, Zagreb.

<sup>61</sup> The Pioneer Union gathered children aged seven to fourteen, strongly contributing to the development of the patriotic feeling and belief in socialism with the youngest. In the post-war period the Union gathered children in actions of renewal, followed even more by various out-of-school activities, manifestations in regard to state holidays and formal events. See I. Duda, *Djeca socijalističke domovine. Izgrađivanje pionirske tradicije u Hrvatskoj 1950-ih godina* [Children of the Socialist Homeland. Creation of the Pioneer Tradition in Croatia in the 1950s], in L. Duraković, A. Matošević (edd.), *Socijalizam na klupi. Jugoslavensko društvo očima nove postjugoslavenske humanistike* [Socialism on the Bench: Yugoslav Society Trough the Lens of the New Post-Yugoslav Humanities], Zagreb, Srednja Europa, 2013, p. 79.

<sup>62</sup> HR HDA 291, MPRO NRH 35, Polugodišnji i godišnji izvještaji o uspjehu (Osnovne škole) [Half-Term and Annual Reports about Achievement (Primary Schools)].

Teaching should have been organised as a collective work, where pupils were getting used to help each other, to coequal friendly relationships, the struggle of thoughts, conscious discipline<sup>63</sup>. All activities bearing elements of socialisation, social character, cooperation, familiarising with the collective, had an educational role, so chorus singing had an important role in primary schools music education. It was assigned the power to remove social, economic and cultural differences among members, the influence in diminishing social inequalities and the power to spread and direct ideas among the masses.<sup>64</sup> Chorus singing was the place where pupils participated in the teaching process 'as active participants' by which music education reinforced education in the spirit of the new ideology. Singing was unison or two-part, depending on the teachers' professionalism and pupils' ability, followed by instruments or a capella<sup>65</sup>.

In the first post-war years, curricula anticipated for all pupils to take part in chorus singing: it was believed that by «proper music education according to the curricula, in time it would be unnecessary to exclude pupils with a so called poorer hearing from public performances»<sup>66</sup>.

Music education was very respected, all shows and anniversaries were accompanied by the school choir, recitals and several solo performances. Everybody sang in the choir. However, if someone had a really bad sense of hearing music, they would be entrusted with other tasks, for example, recitals, so that they would not spoil it. It was important that we all took part in performances (M.P., born in 1947).

The choir was not voluntary, the teacher would say – come singing after school, and you had to come, there was no willy-nilly. The most serious problem were children whose parents thought like – If I did not need school, he does not need it either, so they could not wait for their children to come back from school to send them to pasture with the cattle. According to them, after school chorus singing was a waste of time, so they opposed it a bit, but did not verbalise it, because naturally, they were not allowed to (Ž.R., born in 1943).

We had a choir and we all sang, regardless our hearing. Interestingly, in those post-war years, when I started school, we did not sing to Tito and the party at all, only some children's songs, completely neutral. Maybe the teacher did not know them at all. It was a strange time, everybody feared somebody in the village, everybody was so closed. Just one wrong word and you would find yourself in trouble (M.L., born in 1943).

Advocating the fact that all pupils should be engaged in chorus singing, regardless on the level of their hearing capability, the argument that chorus singing would help the further pupils' engagement in the general social work was beneficial<sup>67</sup>. This suggestion was afterwards revised because the large number of choir performances, thanks to which schools presented themselves in public and

<sup>63</sup> Franković, *Bitna obilježja socijalističke idejnosti i političnosti nastave* [Significant Characteristics of Socialist Idealism and Politics in Teaching], cit., p. 246.

<sup>64</sup> HR DAPA-829, 13, *Društveno politička uloga zborskog pjevanja*, nepotpisano [The Social and Political Role of Chorus Singing, unsigned].

<sup>65</sup> More in the cited curricula.

<sup>66</sup> *Nastavni plan i program za osnovnu školu* [Primary School Curriculum], 1948, p. 62.

<sup>67</sup> Zuber, *Estetsko-muzički odgoj odraslih* [Aesthetic and Music Education of Adults], cit., p. 11.

‘magnified’ the numerous formal manifestations, resulted in the necessity for the selection of pupils who had a correct intonation thus raising the show’s quality<sup>68</sup>. Children usually responded to such common playing in a careless way, without pondering over it, accepting it as a self-understanding part of school duties. Children whose parents were not inclined toward the new authority, in whose homes verses about Tito and the party were mockingly rendered were confused – at school they listened to one story, at home to another, they understood that it was not clever to reproduce what they had heard from their parents, especially outside their home environment.

We had shows where the communist repertoire was performed – *Druže Tito, ljubi ice bijela* and similar. Like all children, we did not pay a great attention to the reason why this repertoire was forced. We did everything we were told, without a lot of questioning. Children were raised in such way once (M.P., born in 1947).

I was singing *Druže Tito, ti naša diko, tebe voli malo i veliko* (Comrade Tito, you are our pride, you are loved by kids and adults), while my friend, a special needs girl, accompanied me as the Imotski ganga is accompanied. As she did not understand a word, and she could not make a sentence, instead of singling the verses, she sang lu-lu-lu-lu-lu-lu. This was heard by a policeman who brought us in for an informative talk regarding insulting Tito and the party. We were only 10 years old. We went by foot for ten kilometres to the first village where its inhabitants informed the national authority representatives about the fact that my friend was ill, while I was harmless to the order (M.T., born in 1936).

We sang ‘battle’ songs, alone, without a conductor. We knew all the songs about Tito and the party, and we also knew, naturally, all the distorted verses we heard at home, from our parents, like *Drug nam Tito otjerao žito, sad se guza oko kukuruza* (Comrade Tito drove our grain away, now he is bending over the corn), *Đed mi steko, a dado sačuvo, ja budala u zadrugu zgruvo* (My grandpa procured, my dad kept it, I fool, boomed it in the cooperative). These were not anti-state songs, they were against the abuse of the village and economic pressure<sup>69</sup> (I.B., born in 1942).

Keeping memories about the past and teaching younger generations about the partisans’ heroism was a paradigmatic art project of the socialist country with the purpose of legitimating the new social circumstances. Singing patriotic songs contributed to the harmonious atmosphere as the embodiment of a happy and bright future. They were part of political rituals, organised so that war and

<sup>68</sup> There were two types of chorus singing in schools: class chorus singing (the class choir was formed of all the class pupils) and school chorus singing (the school choir was formed by pupils who were chosen by the teacher according to their music predispositions). V. Prica, *Nejasna shvatanja o nastavi muzičkog odgoja* [Ambiguous understandings of music education], «Pedagoški rad», n. 9, 1952, pp. 252-255.

<sup>69</sup> Changes in proprietary relationships were one of the first communist authority’s tasks in Yugoslavia after the end of the war. By a line of laws and provisions, a change of proprietorship over property was conducted during and immediately after the war (confiscation, nationalisation, collectivisation). The transfer of property in the state’s authority meant the automatic end of its former owner to dispose of it. That is why unsatisfied villagers complained in the rendered verses that Tito’s authority took their agricultural products (grain and corn) and nationalised their fields which had been their family’s property for generations.

labour victories and all other important events were marked as ceremonially and solemnly as possible. Significant events and figures from the military past were enwreathed with a mythic aureole. Mass songs about Tito, 'brotherhood and unity' and the revolution heritage sang at school and on various manifestations and shows taught «how to love and defend the homeland» while their lyrics were permeated with the binary matrix of the battle between right and wrong, truth and lies, light and darkness, justice and injustice. Commemorative acts and practices, patriotic songs being a part of it, served the purpose of making opinions homogeneous and the socialist community symbolic. The norms and values of the socialist society were passed on by them, support was offered to the existing system and its legitimacy.

\* \* \*

In their revolutionary enthusiasm, the creators of educational politics expected that the historical negative heritage and the objective problems coming out of ignorance and poverty would be removed in a short period of time. Music education aims should have been matched to the basic political paradigms about brotherhood and unity, improvement, growth and development in the spirit of socialism. Curricula accompanied changes in the party line – from the Soviet models, the establishment of the 'Yugoslav way into socialism' to the self-managing orientation. In the area of music education, the realisation of very ambitious aims and tasks was proscribed. Music education and the development of literacy should have raised a new public of the widest working layers of people. It should have created a new social structure of the music audience, making it thus a cultural need for every socialist man.

Such a projection was hardly achievable, the lack of harmony between educational authorities' wishes and the curricula creators and the possibilities that the teachers' personnel and pupils offered was great. The formation of the 'socialist figure' based on the 'transformation of personalities', that is, its harmonisation with certain desirable characteristics was a long-lasting process which needed a high level of systematisation and continuity.

The discrepancy between high art and wider layers of society, visible in the area of music education, could not have been surpassed quickly and easily. The few and insufficiently professionally trained teachers' personnel did not have the ability to adapt sufficiently enough to the ambitious curricula and educational politics' demands.

The anticipated music education results were thus humbler than what was expected. Pupils did not have the chance to familiarise with classical music by attending concerts because such were not held in many, especially smaller places. The kind of music which they had to meet in school curricula was strange and distant. There were few audio materials, as well as instruments on which teachers could demonstrate the theoretical part of teaching materials. Good results were

obtained with pupils who were especially interested and motivated, who learned to play an instrument out of school or had better possibilities to get to know music in their parental home.

The political prescription could not have changed the teachers' personnel physiognomy and separated music education from the people who carried it out, each of them having their own view of the world and social reality. The relation of teachers toward the implementation of 'party mindedness' and 'ideological commitment' in the teaching process was, thus, different. Some teachers probably opposed the new authority's directives, others were indifferent toward them, but among the well-meaning and benevolent there were many who simply did not know how to practically apply the political prerogatives of music education.

In spite of the paternal party interventions (or thanks to them), in the first two post-war decades, great effort was put in bringing music closer to the young, and that was done enthusiastically and with a belief in new art's tasks. The work done on music education brought many positive moves. Ideological messages passed on at school shows and other manifestations closely linked to music education became more and more anachronistic, while saturation with war and political themes was reduced. Chorus singing and participation in instrumental ensembles and vocal groups resulted in numerous young people joining cultural artistic societies. The interest for attending music schools, which started to exist throughout Croatia, was raised. All this resulted in the establishment of high education music studies which have been educating future music teachers up to the present day.

Metaphorically described as «...the cultural good in the service of human happiness»<sup>70</sup>, music teaching confirmed many humanistic values which are today largely devalued: enriching a young person's inner life, the non-competitive spirit and the cooperation ideals of reciprocity and friendship.

### *List of abbreviations*

HR HDA – Hrvatski državni arhiv, Zagreb [Croatian State Archives, Zagreb]

HR DAPA – Državni arhiv Pazin [State archive Pazin]

MPRO NRH – Ministarstvo prosvjete Narodne Republike Hrvatske [Ministry of Education of the national Republic of Croatia]

CK SKH – Centralni komitet Saveza komunista Hrvatske [Central committee of the League of Communists of Croatia]

SP NRH – Savjet za prosvjetu Narodne Republike Hrvatske [Education Council of the national Republic of Croatia]

<sup>70</sup> Požgaj, *Ličnost muzičkog pedagoga kao dominantni odgojni faktor* [The Figure of the Music Pedagogue as the Dominant Educational Factor], cit., pp. 70-71.

NOB – Narodnooslobodilačka borba [National Liberation Battle]  
 CK KPJ – Centralni komitet Komunističke partije Jugoslavije [Central Committee of the Yugoslav Communist Party]  
 NOO – Narodnooslobodilački odbori [National Liberation Boards]  
 NOB – [National Liberation War]  
 CK SKJ – Centralni komitet Saveza komunista Jugoslavije [Central Committee of the League of Communists of Yugoslavia]

*Archival materials:*

*Croatian State Archives, Zagreb:*

HR HDA 291, MPRO NRH, 35, *Polugodišnji i godišnji izvještaji o uspjehu* (Osnovne škole).

HR HDA 1220, CK SKH, Agitprop, 12, Komisija za agitaciju i propagandu 1945-1954. *Ideološki odgoj prosvjetnih radnika. Ideološko -odgojni rad sa kulturnim radnicima/likovni umjetnici, muzičari, književnici*, Zapisnik sa sastanka u Ministarstvu prosvjete; *Izvještaj o školama poslije rezolucije III plenuma CK; Izvještaj o stanju i problemima školstva na području NR Hrvatske; Izvještaj o stanju i problemima školstva u 1949.*

HR HDA 1220, CK SKH, Agitprop, 10, Komisija za agitaciju i propagandu 1945-1954. *Podaci o umjetnicima.*

HR HDA 1598, SP NRH, 145, Zavod za unaprjeđenje školstva. *Elaborat o sprovođenju reforme osnovne škole 1963; Izvještaj upravitelja II Osnovne škole Virovitica na kraju šk. god. 1959/ 1960; Polugodišnji izvještaj na kraju prvog polugodišta šk. god., 1960/1961, Osnovna škola Stenjevec Zagreb.*

HR HDA 1598, SP NRH, 134, *Stanje nastavnog kadra na području kotara Osijek; Problemi kadrova u odgojno-obrazovnim ustanovama narodnog odbora kotara Rijeka za šk. god. 1961/62.*

*State Archives, Pazin:*

HR DAPA-829, Arhiv Slavka Zlatića K 13; 2. 4.12; 2.4.12.7, *Društveno politička uloga zbornog pjevanja*, nepotpisano.

HR DAPA-829, Arhiv Slavka Zlatića, K 3,.2.1., 2.1.1. referat *Problematika muzičkih kadrova*, autor Slavko Zlatić.



*Narrators:*

- M.L., village in Lika (born in 1943)
- M.T., village in middle Dalmatia (born in 1936)
- Ž. R., town in the Kvarner bay (born in 1943)
- M.V., town in Slavonija (born in 1954)
- K.M., town in Posavina (born in 1948)
- T.F., town in Istria (born in 1958)
- Z.G., village in Međimurje (born in 1943)
- E.G., town in Zagorje (born in 1952)
- M.P., village in Baranja (born in 1947)
- I. B., village in Slavonija (born in 1942)



# China and the World: Children's Literature Studies as a Discipline and its Development\*

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**ABSTRACT:** Children's literature studies as a discipline established itself in the west in the late 1960s, and has been enjoying a fast development in the last two decades. Its history of development can be roughly divided into four stages and is now flourishing especially in theme studies and national studies. Graduate programs of children's literature research have been established in some top universities around the world, and have produced a number of experts in the field. In China, children's literature studies, as well as graduate programs, is still in its beginning period with a slow pace, but changes have been taken place under governmental encouragements. This article delineates the developments of children's literature studies in the west and in China since its establishment, analyzes its trends, and reiterates the necessity and significance of children's literature studies.

**EET/TEE KEYWORDS:** Children's literature; Curriculum; Literary studies; China; XX<sup>th</sup> Century.

The burgeoning of children's book market has a long history. It is often dated back to the legendary John Newbery in eighteen-century England, and reached its peak in the golden age during Queen Victoria's reign. Though it was interrupted and affected by the world wars and the great depression, it returned

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to its fast lane of development quickly. Academic studies of children's literature started in the 1960s<sup>1</sup>, and have been thriving in the last twenty years in Europe and North America, as well as in Eastern Asian countries. According to as yet incomplete statistics, currently there are seven major international children's literature associations in the world, nearly thirty international journals which are exclusively devoted to publishing critical papers on children's literature, among which four have been indexed by A&HCI, and one by SSCI. This flourishing in the study of children's literature has influenced Chinese academic circle, and attracted Chinese scholars to enter the new field. One of the most noteworthy changes is that China National Social Science Fund, the most recognized and prestigious Chinese funding body for humanities and social sciences, included the study of children's literature and theory in its application guideline in 2011, which marked the highest governmental recognition of the new research field and its determination to promote its development.

### 1. *Children's literature research in the west*

As a new branch of study, the study of children's literature emerged as a new direction in popular culture studies in postwar western universities, and «has gained a substantial foothold in academia in terms of having their own undergraduate and postgraduate degree courses, textbooks, conferences, and academic teaching and research posts»<sup>2</sup>. Now children's literature studies have covered nearly every critical approach, from close reading, psychoanalysis, gender studies, ethnic studies, postcolonialism, archetypal criticism, to culture studies, media studies, etc. Scholars from other disciplines, such as library science, education, psychology, sociology and history, also pay enthusiastic attention to the study of children's literature, either to draw materials for their own work from children's literature, or directly engage in the field of children's literature studies from their own perspective. This expansion of analytic tools and perspectives brings forth positive diversity and conflicts, leading to more productive communications and negotiations. The renowned scholar Peter Hunt invited an unprecedented large group of 116 contributors for his second edition of *International Companion Encyclopedia of Children's Literature*, which is a case in point for the current richness of research methodology and scope. M. O. Grenby, editor of *Cambridge Children's Literature*, also pointed out in the preface that «[S]uch diversity is cause for both celebration and consternation»<sup>3</sup>.

<sup>1</sup> M.O. Grenby, *Children's Literature*, Edinburgh, Edinburgh UP, 2008, p. 200.

<sup>2</sup> K. Lesnik-Oberstein, *Children's Literature: New Approaches*, Hampshire, Palgrave Macmillan, 2004, p. 1.

<sup>3</sup> Grenby, *Children's Literature*, cit., p. VI.

Western children's literature research has undergone the following stages of development. The 1960s and 1970s is the germinal stage, proposing to treat children's literature critically and seriously. James Steel Smith's *A Critical Approach to Children's Literature* (1967) is such an attempt to accommodate the study of children's literature in the academia. In 1969 Oxford University Press published Gordon T. Sheila Egoff and Ralph Ashley Stubbs's *Only Connect: Readings on Children's Literature*, which was enormously popular in English-speaking countries and Japan. In the preface to its third edition, the editors expressed their hope of linking librarians, child writers, critics, parents and children's literature<sup>4</sup>. Scholars made extensive use of theories from other disciplines and greatly expanded the realm of research, which laid a solid foundation for future developments.

The 1980s was a period of rapid development. Refined researches were conducted on the features of children's literature at different historical periods and their social and historical contexts. S. F. Pickering studied the influence of Locke's philosophy and educational thoughts on the eighteenth-century English children's literature, which was still pioneering at the time but now is accepted as a common understanding. Generally speaking, the defining feature of research at this stage is the expansion and refining of research contents and methods, whose achievements have been pointed out in the preface to *Routledge Companion to Children's Literature* «[C]hildren's Literature Studies has seen remarkable progress since the 1980s, when it was very much a minority interest»<sup>5</sup>.

The two initial stages were low in their pace and output, but the 1990s witnessed the burgeoning of children's literature studies. According to incomplete statistics of the author of this article, there are five monographs written during the 1970s that are still often cited today, ten monographs during the 1980s often cited today, and forty seven during the 1990s. Though these figures are somewhat subjective (in judging their frequency of citation) and incomplete, yet they reflect the characteristics and accomplishments of the period. One example is that *Poetics Today* set up a special column for children's literature in 1992. The following table shows the focuses of research at this stage:

Table 1. Focuses of research of children's literature in the 1990s<sup>6</sup>

Focuses	Books
Anthology of children's literature	3
Cultural studies	3

<sup>4</sup> S. Egoff, T. Gordon, R.A. Stubbs, *Preface*, in Id. (edd.), *Only Connect: Readings on Children's Literature*, Canada, Oxford University Press, 1969, p. 1.

<sup>5</sup> D. Rudd, *Editor's Instruction*, in Id. (ed.), *Routledge Companion to Children's Literature*, London, Routledge, 2010, p. 1.

<sup>6</sup> The data in table 1 and 2 are collected from search results from the Library of Congress (USA) and Google Books, which may not be fully exhaustive but are representative enough to show the trends.

Period studies	3
Gender studies	1
Generic studies	2
Picture studies	2
Internet studies	2
Myth studies	1
Ethnic studies	2
Reading process studies	3
Reader's response studies	1
Studies on single works	4
Children's literature and teaching	2
Theories of children's literature	10
Translation studies	1
Biographical studies	1
Narrative studies	1
General	5
Total	47

The above table shows the following trends:

1. There was a strong emphasis on the editing of primary literature. Authoritative and reliable editions are the foundation for any scholarly work, and this period published three anthologies of children's literature.
2. Research content was further refined, and there was an emphasis on period research.
3. With the deepening and maturing of children's literature studies, monographs on a single work began to appear. This was commonplace for general literary studies, but a hallmark for children's literature studies. Previous research was devoted to building the frameworks of the field and was too busy to confine itself within particular works. Now it was possible to focus on more specific works.
4. There were three obvious focuses of research: an ideological trend in the area, the emergence of studies on nontraditional media children's literature (Internet children's literature) and the application of narrative theory in the study of children's literature.

The practice of applying ideological approach in children's literature obviously had a lot to do with the same trend in literary criticism in the 1980s, when a considerable number of scholars turned to the social and historical context of text and «regarded text solely as a political phenomenon»<sup>7</sup>. This trend almost became a homogeny in critical power. Out of the ten books on theories of children's literature, four adopt from ideological perspective.

<sup>7</sup> S. Dan, *On the exclusiveness and supplementation of contemporary critical theories*, «Journal of Peking University (Social Science Edition) », n. 4, 2000, p. 200.

The Internet was popular and became in wide use in the 1990s and a lot of printed works were posted on the Internet, often with illustrations and sometimes even with music. Other authors directly published their works online. This trend provided a new media and a new way of writing for children's literature. Some scholars soon sensitively felt the emergence of this new trend and turned their critical attention to children's literature in the Internet age, researching the difference between traditional works and the new Internet children's literature. At the same time, the flourishing discipline of narrative studies also provided a new possible analytic tool. This was also the time when classical narrative theory gradually developed into postclassical narrative theories, with the appearance of feminist narrative theory, cognitive narrative theory, rhetorical narrative theory, and so on. These new theories were more adapted to dealing with particular types of texts and began to make their appearances in children's literature research.

In the twenty-first century, research in the field has kept its high speed of development. During the first ten years, there were altogether ninety four books, surpassing the total of the last few decades.

Table 2. Focuses of research of children's literature in the 2010s

Focus	Books
Anthologies of children's literature	2
Childhood	4
Gender studies	5
Film studies	1
Generic studies	8
Internet studies	1
Myth studies	1
National studies	9
Period studies	9
Picture studies	7
Publishing	2
Ethnic studies	4
Reading studies	2
Studies on single works	3
Children's literature and teaching	1
Theme studies	12
Theories of children's literature	3
Translation studies	4
Biographical studies	5
Total	94

The above table shows that:

1. Research focus has shifted from ideological studies to national, generic and period studies. An example that can demonstrate the vast national scope is *International Companion Encyclopedia of Children's Literature*, which discusses children's literature from forty one countries and regions, such as Hungary, Mongolia, Slovenia, and Turkey. Generic studies are typically represented by Jack Zipes' focused studies on fairy tales. Period studies mainly span from the eighteenth century to the twentieth century, with an obvious concentration on the nineteenth century.
2. There are new research perspectives: translation and theme studies. Translation studies have gained its prominence also in the last two decades, and have made its timely appearance in the study of children's literature. The earliest research was M. Drott-Huth Barbro's *Bringing Children's Literature Home from Abroad: The Translation of Children's Books from Swedish to English*, published by California University Press. Theme studies are the hottest area of development, with various discussions on heroic images, animals, Utopia, food, the Holocaust, and others, and will probably keep its developing momentum in the next few years.

Overview on the development of children's literature studies shows that after establishing its position in the academia the discipline is beginning to flourish in a comprehensive and profound way in the following aspects: the specialization of research contents in specific historic periods which study features of children's literature at different historic periods, and the attention paid to the influences of national and regional cultures on the features of children's literature. The two aspects are sometimes combined, such as in Heather Scutter's *Displaced Fictions: Contemporary Australian Fiction for Teenagers and Young Adults*. Together with this trend of specialization is the trend of encyclopedic collections which include chapters on different historical periods and different national children's literature, typically represented by Peter Hunt's *International Companion Encyclopedia to Children's Literature* with one hundred and sixteen contributors, one hundred and twelve chapters and one thousand two hundred and eighty pages. Other collections in the same category include Victor Watson's *The Cambridge Guide to Children's Books in English*, Bernice E. Cullinan and Diane Goetz Person's *The Continuum Encyclopedia of Children's Literature*, and Jack David Zipes's *The Oxford Encyclopedia of Children's Literature*.



## *2. Development of children's literature graduate programs in western universities*

The curriculum of children's literature in western universities and M.A. and doctoral degrees began in the latter part of the twentieth century, though scholars began their research in this field much earlier. The first university to offer an M.A. degree in children's literature was Reading University in the year 1984. Its graduate program is quite comprehensive, including core courses composed of critical theories and cultural studies and optional courses of children's literature on different historical periods. Since then, other famous universities, such as Cambridge University, also began their graduate programs of masters and doctors degrees on children's literature, usually in the department of education and English. One of the most famous is the Faculty of Education at the University of Cambridge, which is now chaired by the renowned scholar Maria Nikolajeva, who formerly taught at Stockholm University. The faculty has been widely recognized by the world for its excellent master and doctor programs and its holding of various top International academic meetings, and has attracted a lot of visiting scholars. In the US, ivy-leagues and many top public universities also host scholars of children's literature and offer courses in the field, such as Harvard University, Yale University, University of Chicago, University of Florida, University of Minnesota, etc. It is also available in universities in Canada, Britain and Australia. Besides, some of them have also set up centers for children's literature research. It can now be safely concluded that the subject of children's literature has established itself firmly as an academic discipline. Its flourishing produces continuous academic output and more qualified experts in the field, providing solid support for creative writing of children's literature, as well as editing, publishing, and research of children's literature.

## *3. Children's literature research in China*

Compared with the history of children's literature studies in the west, its beginning in China was not too late, but suffered an extremely slow pace due to the common neglect of children's literature. According to one of the most pioneering and famous scholars, professor Fang Weiping from Zhejiang Normal University, it can be dated back to a joint meeting «National Forum on the Publishing of Children's and Youth's Books», which was held by seven governmental bodies in Lushan in October, 1978 (including the National Press Bureau, Ministry of Education, Ministry of Culture, Central Committee of the Youth League, Women's Union, Writer's Union, and the National Association of Science). The meeting in a sense justified the research of children's literature and therefore marked the beginning of subject. One year later, Zhejiang Normal

University (then named Zhejiang Normal College) resumed its optional courses on children's literature which were offered since its establishment in 1956. It also set up a research center for children's literature and offered master program in children's literature. Now almost forty years has passed, but there are only four universities in China that have graduate program in children's literature: Beijing Normal University, Zhejiang Normal University, Shanghai Normal University and Ocean University of China<sup>8</sup>. Beijing Normal University's master's program in children's literature is independent, but its doctoral program is still a sub-branch of the doctoral program of modern Chinese literature. The graduate programs in the other three universities are all contained in the graduate program of modern Chinese literature and do not have their independent quotas to enroll students. The current condition and setup of the graduate program to a certain degree reflect the lagging behind of the development of the discipline in China. Presently there are four university research centers of children's literature, which are Chinese Children's Literature Institute in Beijing Normal University, Research Institute of Children's Literature in Zhejiang Normal University, Research Institute of Children's Literature in Shanghai Normal University, and Research Institute of Children's Literature in Ocean University of China.

In terms of academic output, there are two different kinds: research of Chinese children's literature and that of western children's literature. This paper only concerns itself with the latter, which includes monographs, literary histories, and translated academic works. There are more than twenty monographs, which are mainly focused on fairy tales and works from the nineteenth century, while paying little attention to other genres and other historical periods. The first children's literature history is Wei Wei's *Brief History of Foreign Children's Literature* (1986), and now there are altogether seven histories, covering countries of Britain, Germany and others. These histories serve as good reference books and introduction to children's literature in the west. However, there are two drawbacks regarding these literary histories. First, most of them are largely listing various authors and works, their plots and characters, while paying insufficient attention to more profound changes in literary history such as changes of taste, readership, and literary conventions. They introduce children's literature well, but cannot provide an insightful view of the intangible history. Second, some authors of these books lack rigorous academic training and do not acknowledge their sources all the time nor give a reference. The most rapid developing area is the introduction of western research of children's literature, most of which come in two series. Professor Wang Quangen from Beijing Normal University has edited *Contemporary Western Children's Literature Criticism Translation Series* (of ten books). Professor Wang Quangen is in

<sup>8</sup> It should be noted that of the four universities mentioned here, three are normal universities that have a natural tie to child-related degrees and only the last one is not, having a nationally renowned scholar of children's literature as its chair of the School of Literature and Journalism.

close touch and good cooperation with international scholars and has invited scholars such as Maria Nikolajeva to give lectures in China. Another series is *Hyacinth Children's Literature Criticism Translation Series*, edited by Professor Fang Weiping, who is on the international editorial board of the journal *History of Education and Children's Literature*. These two series include some of the most well-known international scholars' important works, such as John Stephens (*Language and Ideology in Children's Fiction*), Perry Nodelman (*The Pleasure of Reading Children's Literature*), Maria Nikolajeva (*The Rhetoric of Characters in Children's Literature*), Peter Hunt (*Understanding Children's Literature*), and others. These translated works play an indispensable role in introducing the most pioneering research in the field to China and showcase the great diversity in research contents and methods. However, when the editors planned the series, they only included the most representative works by the most famous scholars in the field, all of which are results of highly specialized research and do not start from the scratch, making it quite difficult for those readers who do not have a clear idea of the present assumptions, understandings and methodologies in the field. The lack of introduction of more referential, textbook-like, encyclopedic works means only those who are already an expert have the ability to read them. This, in turn, result from a division of department of children's research in China. Those who engage in the research are mainly from the Chinese department and the English department. The former is more internationalized and familiar with western critical trend, while the latter is largely unfamiliar with research achievements in the west. This situation lead to the phenomenon that the research field in China is divided into two distinct schools, each with little understanding of the other and with different methodologies, which slows down the pace of the development of children's literature research. The result is the common superficial treatment of diverse topic in a single book, which are characterized by discursiveness in terms of argument and structure, or by a starting effort to apply western critical approaches, and in some other cases, by the impressionistic way of commenting children's literature.

Research output in China is more fully embodied in journal papers than in monographs. According to the largest journal database in China, from the year of 2000 to 2015, the number of journal articles containing «children's literature» as one of their keywords and having been index by Chinese Social Science Citation Index (CSSCI) is 607, while the number for the period from 1980 to 1999 is only 102, demonstrating the rapid development in the research field in the recent dozen years. Out of the 607 articles, 545 of them research on Chinese children's literature, and only 133 articles on western children's literature, displaying a strong emphasis in the study of national children's literature and at the same time a general neglect in the study of western children's literature. If we compare this contrast of figures with the popularity of western children's books in China's children's book market, we can see that

there is a strong government-led research enthusiasm in the study of Chinese children's literature. The articles on western children's literature usually pay more attention to themes, writing techniques and comparison of eastern and western cultures, and very few of them have adopted more mature and updated critical approaches in their research. The result is most of these articles tend to compare themes and topic superficially, lacking solid textual foundation and theoretical depth.

In terms of research funds and endowments, the most recognized ones in China are National Social Science Fund (NSSF) and Ministry of Education Humanities and Social Science Fund (MoEHSSF). From the year 1995 to the year 2015, there are four projects being funded by NSSF and five by MoEHSSF. The earliest such fund was in 1998. Among these, three funds are on fairy tales, two on the translation of children's literature, and two on comparison of Chinese and western children's literature, and these nine projects have produced a total of twenty six articles indexed by China Social Science Citation Index (CSSCI). It shows a concentration on the more mature research area of fairy tales and calls for more critical attention to the hitherto vast neglected area of other genres. The most productive fund is «Research of Modern and Contemporary British Fairy Tales», which was carried out by Professor Shu Wei from Tianjin Institute of Technology. Professor Shu began his studies of children's literature in 2001 and since then has done in-depth research on nineteenth century British fairy tales such as *Alice in Wonderland* and *Wind in the Willows*. From the year of 2009 to 2013 he and his research team published sixteen articles from various perspectives, while other funds have only published a total of ten articles indexed by CSSCI.

#### *4. Development of children's literature graduate programs in Chinese universities*

Compared with western universities, Chinese universities are lagging behind a long way in its children's literature graduate program. There are only four universities that offer such programs in China, and it should be noted that out of the four three are normal universities. Besides, none of these four universities are among the top ten universities in China. The underdevelopment of children's literature graduate programs in China is a reflection of its neglected presence and unrecognized status. In the 1990s, the graduate program «Chinese children's literature» was once rearranged to be a secondary discipline under the major discipline of «literature», but it was cancelled in 1997. This graduate program is now recognized only as a third-level discipline in the above four universities. Due to the fact that children's literature is only a research direction instead of an independent discipline, it is suffering from inadequate enrollment quota,

faculty equipment and financial support<sup>9</sup>. Wang Quangen also pointed out the lack of children's literature faculty members «[C]urrently there are no more than fifteen universities in China that still offer courses on children's literature, and the national total number of faculty members conducting children's literature research (including adjunct professors) is less than fifteen, i.e., there is hardly one faculty member in every two provinces<sup>10</sup>.» This situation became a little bit better after the National Social Science Fund included children's literature in its guideline in 2011, but is still far from satisfactory. Famous scholars of children's literature in China have for many times called for a more serious arrangement of the discipline of children's literature<sup>11</sup>, but their callings have barely been answered.

### 5. *Significance of children's literature studies*

It is necessary to expound first the significance of literature before touching upon the significance of children's literature studies. Literature is an inseparable part of our daily life. We are immersed in literature in our everyday life, from films, television, magazines, to advisements that cannot practically be avoided regardless of one's effort, and these, though by definition not literature proper, have intimate connections with literature. Literature plays a far more profound role in shaping our characters, minds and personalities than we are aware of. The question is that language, the material and embodiment of literature, is not a passive tool similar to a mirror, mechanically reflecting everything in front of it, but is itself a part of our mind, whose mechanism is still for a large part mysterious even to the most pioneering scientists. It affects what we think and how we think. The title of the book *The Prison House of Language*, written by the famous theorist F. Jameson, is a vivid metaphor for the function of language. Language is our means to describe and think about the world; it is the embodiment and channel of mind. It is exactly because of this that language also limits the way we describe and imagine the world. What is beyond language is also beyond our mind. Literature is the traditional material we use to conduct language teaching, and it also affects the way we think about this world by its

<sup>9</sup> Wang Quangen, *On the unreasonableness of literature disciplines arrangement in the ministry of education directory of disciplines*, «Academia», n. 2, 2004, p. 101.

<sup>10</sup> Wang Quangen, *The current worrisome condition of the discipline of Chinese children's literature*, «China Newspaper of Reading», May 30<sup>th</sup>, 2001.

<sup>11</sup> Please refer to W. Quangen, *The current worrisome condition of the discipline of Chinese children's literature*, «China Newspaper of Reading», May 30<sup>th</sup>, 2001; Shu Wei, *Graduate programs of foreign literature should include children's literature research*, «Teaching Studies», n. 4, 2002, pp. 326-329; Z. Ziqiang, *On the subject of Chinese children's literature studies and its development in the transformational period*, «Southern Forum», n. 4, 2009, pp. 38-41.

contents and particular way of expression. It trains our linguistic and intellectual sensibility and conducts the conscious or unconscious ideological education. In this light, children's literature is targeted at our beginning period of language learning and knowledge acquisition and therefore has particular significance for us. Whether it is the English course in the US and UK, or Chinese course in China, or Italian course in Italy, language course in primary school inevitably involves world views, values, and mind patterns. Children acquire much more than what is tangibly stipulated in the curriculum.

In this sense, children's literature has vital significance that it is not only the instrument of language education for children and youths but more importantly affects their minds and ideas in a profound way. What is more, the present condition of children's book market in China gives pressing practical importance to children's literature.

Children's book market has been thriving in China for the last twenty years and will probably continue its developing momentum, but a prominent problem is the domination of foreign works in the market. Western children's literature has a long history and also a long list of classics, not to mention numerous bestsellers in recent years, whereas Chinese children's literature, due to its late beginning, has few recognized classics and is therefore in a fairly inferior position to compete with foreign works. Before the Republic of China, traditional education in China held a concept of childhood similar to the notion of «adult in miniature» as in the west, and did not condescend to produce works that were specially targeted at children and mixed pleasure in reading. Children's literature in the modern sense started in the May 4<sup>th</sup> period (around the 1910s and 1920s), and continued to develop in the 1930s with Ye Shengtao, Bing Xin, Zhang Tianyi and Chen Bochui, whose works composed the major part of the canon of Chinese children's literature. It almost came to a complete stop during the Japanese invasion. After the establishment of People's Republic of China, it gradually recovered and produced major contemporary child writers such as Zheng Yuanjie, Jin Bo, Cao Wenxuan and other few writers, but this list of major writers is also quite short. What should be especially pointed out as its background is the fact that the Ministry of Education issued new curricular standards (New Curricular Standards for Compulsory Education) in 2011, which laid heavy emphasis on reading for primary school students. Five graders and six graders, according to the new standards, are required to read materials more than one million words after class annually<sup>12</sup>. The new Chinese curricular standard provides an appendix of recommended reading list, which, though inexhaustive in itself, lists more foreign works than Chinese works. The dominance of foreign children's literature and the obvious weak

<sup>12</sup> Ministry of Education, *Curricular Standards for the Chinese Course in Compulsory Education* [Yiwu Jiaoyu Yuwen Kecheng Biao zhun], Beijing, Beijing Normal University Press, 2011, p. 41.

position of Chinese national children's literature is not only reflected in the new curricular recommendation reading list, but also more substantially reflected in the current conditions of the book market. Due to the lack of attractive national works, almost every publishing company in China is enthusiastic about all different kinds of book series titled «world children's reading library», and it is a common fact that nearly every Chinese child is extremely familiar with Snow White, Aesop's Fables, Grimm's Fairy Tales, but has very little knowledge of those written by Chinese authors. The problem, of course, is not the problem of children themselves. A demonstrating and quite shocking fact is that, according to one of the top three online booksellers Dangdang's «Annual Top Ten Books», the top ten books in 2008 were all foreign books (translated into Chinese), most of which were from the U.S. and Japan, and some from Netherland, France, Sweden. The top ten books in 2009 were also all composed of foreign books. This «Annual Top Ten Books» did not continue since 2010, but anyone who is a frequent visitor of children's books section of online booksellers can easily find out that the situation remains pretty much the same, if not becoming worse. The lack of Chinese child writers and the enthusiasm of publishers in producing collections of foreign children's literature instead of Chinese children's literature thus arouse deep concern of children's literature researchers, educators and the government.

In this light, to conduct and promote children's literature research is not only a need to catch up with international academic trend, but also an urgent need for the cultural education of China's next generation.

### *Conclusion*

Children's literature studies in China began its development in the context of the thriving of the discipline in the west during the last two decades. It has conducted research on Chinese children's literature from May 4<sup>th</sup> period to contemporary works, and has lately started its research on western children's literature. With the driving force of the national research fund and research centers as incubators of field experts, as well as the introduction of the most updated international research achievements, it is accumulating momentum towards a bright future.





# From mother to woman

## The child's socialization in the Italian kindergarten from the 60s to the 90s. Assistance, citizenship and education

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**ABSTRACT:** This article is about the development in the kindergarten through the analysis of the manifesto and the contemporary psycho-pedagogical critics in order to identify the joints that mark the evolution of children's socializing models and the transition from a paradigm of education and socialization informal family and mother based, to a more institutionalized and formalized one. Background to these joints were social, cultural and political transformations which took place in Italy after WWII: the loss of the traditional open family based approach and a new professional support to the parenthood, run by the State or local authorities not depending only on the individual demands. The wide spreading of those services has modified the perception of the woman's social role, being an important feature of women's emancipation and development of a new identity of the childhood which will turn out to be less dependent on the own caretakers and more competent on the social negotiations and multiple identifications.

**EET/TEE KEYWORDS:** Infancy; Women empowerment; Child's socialization; Kindergarten; Italy; XX<sup>th</sup> Century.

The kindergarten<sup>1</sup> – according to its rules and representations of its evolution as social and pedagogical agency – is a precious sign of the evolutionary processes of the family, of the parenthood roles, of the children's socializing models according mostly to the enculturation and learning practices. On the one hand

<sup>1</sup> The *Orientamenti per l'attività educativa nella scuola materna del 1991* report as follows: the term «scuola materna» and «scuola dell'infanzia» [both terms are kindergarten in English – translator's note] are both used together with «scuola del bambino». But «scuola dell'infanzia» can be considered the closest to the evolution to the present situation”.

those elements have certainly influenced the change in the folk pedagogy, which was very widespread in the post war Italian society, in a circular and recurrent way, on the other hand they have freed the female mother-centered model, which used to allow the traditional family's structure to be the social generator being therefore ambivalent.

According to the childhood sociology of the 70s, referring not only to Horkheimer's<sup>2</sup> and Habermas's writings<sup>3</sup>, but also to Ariès<sup>4</sup> and De Mause<sup>5</sup> – the child and the woman, since the modern era on, have been both victims of a clear privatizing process (seen as an expropriation-alienation of vital spaces and personal fulfillment). Saraceno writes:

The more or less aware effect gotten by the almost of exclusive attribution to the mother of the infant care and socialization (even when with the help of other institutions) and mutually the reduction of the woman to the mere role of mother in family isolation, have made her more available to fit herself to the outside expectations of her behavior (maternal) and her offspring and built up in the child such a model<sup>6</sup>.

The effects of the privatising-deprivatising – determined by some other causes like the unhinging of the traditional widened family and of the social informal networks due to the urbanization, the changes in the production model, the migration, internal and external to our country – have led to a further impoverishment, mainly of the middle class, of opportunities for informal education and parental skills, being given to artificial agencies (kindergartens and preschools) – tailored for that purpose – which have spread throughout the territory in the 50s in Italy. Saraceno explains

the gradual professionalization of all the roles around the childhood – included the maternal one – is not only a major and praiseworthy awareness of what the childhood is about. It implies both a stricter definition of the child himself – out of spontaneous intuitions or of

<sup>2</sup> M. Horkheimer *et al.*, *Studien über Autorität und Familie*, Paris, Alcan, 1936, It. transl. *Studi sull'autorità e la famiglia*, Torino, UTET, 1974.

<sup>3</sup> According to Egle Becchi: «The issue of the relationship between parents and children has been studied mainly by the Frankfurt School in particular about the attitude and practices by father and mother toward their children. They built up a theoretical frame about the bourgeois and working class family. The child-son/daughter is the focus of a series of socializing processes where he/she can learn the social authoritarianism through the familiar pedagogical practices, in particular by the father to him/her and the mother. The same society is reproduced in the micro-world of the family and the child can foresee what he will be: an obedient subdued of a little or no free society» (E. Becchi, *Il nostro secolo*, in E. Becchi, D. Julia (edd.), *Storia dell'infanzia. Dal Settecento a oggi*, 2 voll., Roma-Bari, Laterza, 1997, p. 395).

<sup>4</sup> See P. Ariès, *L'enfant et la vie familiale sous l'Ancien Régime*, Paris, Pion, 1960, It. transl. *Padri e figli nell'Europa Medioevale e moderna*, Roma-Bari, Laterza, 1994.

<sup>5</sup> See L. De Mause, *The History of Childhood*, The Psychohistory Press, New York, Souvenir, London, 1974, It. transl. *Storia dell'infanzia*, Milano, Emme, 1983.

<sup>6</sup> C. Saraceno, *La socializzazione infantile come definizione dell'infanzia. La famiglia*, in E. Becchi (ed.), *Il bambino sociale. Privatizzazione e deprivatizzazione dell'infanzia*, Milano, Feltrinelli, 1979, p. 129.

residue of a basic and more or less uncontrolled culture – and a more rigid division of the child's experience through the definition of spaces of contents, and also of roles of adults involved in the relationship with childhood. In other words there is a stricter and stricter programming of child's experience and existence<sup>7</sup>.

A convergent ideological pressure by cultural and economical superstructures has been detected to maintain the *status quo* with strong effects on the quality of life of families (fathers included)<sup>8</sup> and also on the democratic basis since their origin. The psycho-pedagogical theories, developed since the middle of last century – for example by Bowlby to Winnicott – foresaw a socializing model of the child which was based on the symbiotal relation mother-child, a relationship which excluded other social/professional roles of the woman.

An unripe childhood, de-socialized because totally unreal and affection willing, is able to call upon itself all the functions of family and the mother in specific. According to that:

the debate about the work outside the family of the woman-mother has developed through three prejudices corresponding to the ideology of the private family, legitimizing her social function as a private institution. Firstly the basic assumption was that the close relationship mother-child in the early childhood (up to about 3 years) is necessary, indisputable and positive. That dominant relationship would last longer, up to ten years. The work of the woman would therefore result to be rather disturbing and then to be evaluated and corrected it as such: a child whose mother works is anyway deprived. It is a consequence of the belief that a mother is irreplaceable inside the family<sup>9</sup>.

### *Difficulties and prejudices*

As the social reference frame was the one above, it is not hard to believe that the kindergarten has encountered many difficulties in finding its own pedagogical dignity and it has been hindered for a long time up to its final

<sup>7</sup> *Ibid.*, p. 144.

<sup>8</sup> «Therefore the father doesn't turn out to be – according to the classical model of Oedipus – the clarifying element, the one who breaks with the original symbiosis and introduces the law of distinction through which the autonomy can be possible in a male world, but he is actually an element himself of such a hindrance. That was valid for the middle class fathers, who didn't expect any satisfactions or fulfillment inside the family as they got them outside through economical and political relationships, but a symbol of their status quo and power, of their possibility of expression and experience of human values. The fathers of the working class who have sought inside the family the fulfillment of their needs don't find answers through that either. They have been working for the needs of their families as they find a sort of confirmation inside it as a mirror of their identity and reward to their sacrifice. They therefore depend more and more as concerns the affections there is no alternative to being dependent but loved» (*Ibid.*, p. 136).

<sup>9</sup> *Ibid.*, p. 136.

turning autonomous<sup>10</sup>, widespread and legitimated. In Italy for a long time the counter position between family and pre-school education has been used as tool to control the child's (and women's) socializing spaces in the traditional family frame (characterized by informal, merrymaking, loving and depending mood). The Agazzi method enhances the maternal influence in the child's education as if mother and teacher would be almost the same by joining together two antinomies such as the natural education and the right moment. Here is a short text of the 50s by Chizzolini<sup>11</sup> and Agosti<sup>12</sup>:

our technique finds its main inspiration from domestic function and it tends to integrate the maternal work, that is why our Institute gathers all kinds of women-educators according to the following scheme: a) aspiring teachers, b) children's caretakers, c) mothers<sup>13</sup>.

Aldo Agazzi<sup>14</sup> agrees with that, when he comments on the nature of the Italian kindergarten:

the natural environment of the child is the home, the house's coziness warmed by the mother, the space where 'the spirit and the shape of the family' are reborn, where the dimensions of living together can be characterized by different activities, as true work, playing and socializing, that are experienced in tranquility<sup>15</sup>.

Through the fundamental documents about the kindergarten in Italy there is a constant hint to the family as a recall to the pedagogical discourse. In *Programmi* issued by the D.M. 9<sup>th</sup> february 1945 (Minister Vincenzo Arangio Ruiz), we can read: «the mother is the first natural educator of the child. The kindergarten cannot replace the family nor the mother, but it must complement her job and get the child closer to a richer world of experiences. So his world will be oriented by the family and he will absorb the systems of his home education». The report on *Disegno di legge n. 2100* (Minister Guido Gonnella),

<sup>10</sup> See F. Frabboni, *Verso una scuola dell'infanzia maggiorenne: pedagogia e didattica dell'obbligo a cinque anni*, Firenze, La Nuova Italia, 1998.

<sup>11</sup> Educator and catholic pedagogist (born in Brescia Jan 3<sup>rd</sup> 1907 and died there May 24<sup>th</sup> 1984) he has been chief editor of the important pedagogical review «Scuola Italiana Moderna» for half a century.

<sup>12</sup> Educator and catholic pedagogist (born in San Marco Calcinato near Brescia, Dec 23<sup>rd</sup> 1890, and died in Brescia July 29<sup>th</sup> 1983), he was one of the protagonists of the activism movement in Italy – spiritualistic and personalistic wing. With Zammarichi, Tedeschi e Chizzolini he was the catalyst of that pedagogical group of Editrice La Scuola. He has inspired the foundation of (1948), the group *Maestri sperimentatori di Pietralba*.

<sup>13</sup> M. Agosti, V. Chizzolini, *La scuola materna italiana*, Brescia, La Scuola, 1950, p. 21.

<sup>14</sup> Italian pedagogist – from the personalistic wing – (born in Bergamo in 1906 and died in 2000), after being a teacher for 20 years he became Professor of Pedagogy at Catholic University of the Sacred Heart of Milan. He has published intensively, been a consultant of the Ministry and has taken part in the debate about the renovation of the Italian school system.

<sup>15</sup> S.S. Macchietti, «*Etica deve essere l'asse dell'educazione*». *Riflessioni sulla proposta di educazione morale di Aldo Agazzi*, in S.S. Macchietti, G. Serafini, *Educazione morale. Pagine di storia di pedagogia dell'infanzia*, Roma, Armando, 2011, p. 94.

presented at the Parliament on 13<sup>th</sup> July 1951, at the article n. 3 – II recalls the function of the family which has a higher role than the pre-school one:

the kindergarten is recognized as an educational institution linked tightly with the family from which the child is inseparable [...] according to the articles 30 and 34 of the Constitution, the State cannot oblige parents to join the kindergarten for their kids and, in case they want to, the school must be a mirror of the educative habit of the family.

Later on, in *Orientamenti dell'attività educativa della scuola materna*, issued by the DPR 11<sup>th</sup> June 1958, n. 584 (Minister Aldo Moro) it is stated: «the kindergarten educates the child from 3 to 6 going on and integrating the work of the family through intimate collaboration». The law 18<sup>th</sup> March 1968, n. 444, *Ordinamento della scuola materna statale* (Minister Luigi Gui), article 1: «the public kindergarten [...] sets its goals into education, development of the child's personality, assistance and preparation to school through an integration of the efforts of the family». Finally the *Orientamenti per l'attività educativa nella scuola materna statale*, issued by D.P.R. 10<sup>th</sup> September 1969, n. 647 (Minister Mario Ferrari Aggradi), centers on the relationships school-family the third chapter of part I: «a constant relationship school-family is advisable [...]; the kindergarten cannot be considered a family substitute [...], it is an integration and a widening of the parents' job».

As Tadini underlines, all the studied documents recognize, implicitly or explicitly, the primary right of the family to educate the children; it is commonly recognized that school cannot surrogate or substitute the family (or ignore – to become trickily a family substitute). It is recognized that school integrates family. Now the concept of *integration* gathers all the variations which can be noticed in the different documents; as a matter of fact integrate means also «to cooperate», to continue, to operate in agreement it means «to enlarge»<sup>16</sup>. The issue is therefore to see if in the term *integration* (from the school to the family's work) there is also a pro-active political function by the State, that is a moral, educational and pedagogical action (which must be balanced, unconditioning and compensational, too). Aldo Moro agreed with that and declared: «the State complies with the education due to its own moral status when it knows it deserves it. It does not substitute but it integrates the private action and the latter does the same with the public one»<sup>17</sup>. Under the pedagogical view it means that:

<sup>16</sup> F. Tadini, *Scuola materna e famiglia. Necessità della scuola materna nella società attuale*, in *Principi e motivi dei vigenti Orientamenti per la scuola materna*, Brescia, La Scuola, 1970, p. 25.

<sup>17</sup> A. Moro, *Scritti e discorsi. 1940-1947*, Roma, Cinque Lune, 1982, Vol. 1, p. 314.

family and school can integrate mutually according to their missing aspects. The family is not enough for child's intellectual and social development; the school is missing on the affective and partially ethical aspect. Those deficiencies are often interconnected. The tight cooperation grants balance and sometimes mutual correction<sup>18</sup>.

The birth of the kindergarten and all the pre-schooling institutions<sup>19</sup> was given by the active and direct action by the State – or at least the idea of – as a supporting tool to the childhood through a school policy in order to overcome the previous institutional frames (private religious school): that was not a mere subsidiary tool to the already existing agencies<sup>20</sup>.

The kindergarten in particular

was considered by the secular wings and labour parties as a fundamental turning point to renovate all the pre-school through a healthy competition and experimentation on the structures and methods, which had been so far linked to an empirical and approximate tradition<sup>21</sup>.

The public school favored those innovations<sup>22</sup>, and led to the generation of municipal schools, too. That happened mainly in the left-wing run regions where the social government overcame the previous one according to the «alternative pedagogy» model. Malaguzzi<sup>23</sup> writes:

<sup>18</sup> M. Laeng, *La scuola oggi*, Firenze, La Nuova Italia, 1975, p. 33.

<sup>19</sup> See Nadia Gallico Spano's speech at the meeting of the Assemblée Costituente in 1947: «the State must unify the assistance and create institutions to that aim; quarters' nurseries, kindergarten which are often run by private institutions and favor the ones already there in order become more democratic».

<sup>20</sup> See G. Giampietro, *Verso la nuova legislazione scolastica*, «Civiltà Cattolica», vol. II, 1950, p. 381.

<sup>21</sup> D. Bertoni Jovine, C. Ronchi, *Metodi e strutture della scuola materna*, in *Il bambino La famiglia La società*, Atti del 1° Convegno italo-cecoslovacco sui problemi dell'infanzia pre-scolastica. Roma, 19-20 novembre 1966, Roma, s.e., 1968, p. 135.

<sup>22</sup> Sira Serenella Macchietti recalls: «in the decade 1970-1980 that programmatic document was understood and made true through different pedagogies. The debate on the children's school was very pluralist which led the school to have many educational models thanks to the many experiences and they also led to a quality growth» (S.S. Macchietti, *Il dibattito pedagogico fra il 1969 ed il 1991*, in N. Paparella (ed.), *Progetto scuola materna. Commento ai vigenti 'Orientamenti'*, Brescia, La Scuola, 1985, p. 47).

<sup>23</sup> Born in Correggio Feb. 23<sup>rd</sup> 1920, died in Reggio Emilia in 1994. Graduated in Pedagogia at University of Urbino he was first elementary school teacher in 1946. In 1950 he became school psychologist and he founded the *Centro medico psico-pedagogico comunale* of Reggio Emilia where he had worked for over 20 years. Since 1963 he had been cooperating with the Administration to open communal kindergartens. Publicist consultant for the Ministry of Education, director of *Zerosei e Bambini*, in 1980 he founded in Reggio Emilia il *Gruppo Nazionale Nidi Infanzia*. Among his prizes in 1992 Ygdrasil-prize Lego (Denmark) forces works for the childhood. About Malaguzzi see A.H. Planillo, *Loris Malaguzzi. Biografia pedagogica*, Azzano S. Paolo, Edizioni Junior, 2004.

A different vision of knowledge and education have taken place where the old private schemes had been placed by a public and common run as new visions came along. The devolution and democratic management accelerate the end of the authoritarianism, the unique sense of culture, the codified and static shapes, substituted by the creative and main research momentum. A new teacher-pupil relationship becomes a powerful tool of knowledge's socialization<sup>24</sup>.

The social trend of children's education has at least two reasons (under the institutional and alternative pedagogical vision): mingle the family and the society's culture by avoiding narrowed institutions (Focault) and open the school knowledge to the territory reconfiguring the relation between informal and formal knowledge (praxis and theory). As regards the first aspect, the social management and the parents presence should have interrupted the loneliness of the teacher in his/her management and reduced the isolation of the families and mothers in specific<sup>25</sup>. That model criticized the educator's one according to the *Orientamenti* of the time and the idealistic pedagogical model of a child which was unrealistic as it was a-priori, out of history and metaphysical<sup>26</sup>. About the educator there has been a transformation of the typical profile of «the moral idealism, which sees the essential elements of the educational and teacher's profile as social and ethical [...] in order to make it objective and professional according to the universalistic rules»<sup>27</sup>. It is about leaving out the myth of the teacher-mother moved by an ethical call (missionary or a sublimated mother-deputy) – «the educator takes part in children's life with motherly love» (*Orientamenti* '58) – in order to work a professional educator's profile out – as it will be crystal clear in the *Orientamenti* '91. That passage will turn out to be crucial for the child only centered on the family and the new model will be different since the '80s.

<sup>24</sup> L. Malaguzzi, *Contenuti e finalità dell'educazione del bambino nell'esperienza emiliana. Relazione al convegno regionale su "il bambino soggetto e fonte di diritto nella famiglia e nella società, Bologna 21-22 aprile 1975*, in *Pubblicazione a cura dei comitati "scuola e città" delle scuole comunali dell'infanzia di Reggio Emilia*, s.e., 1976, p. 19.

<sup>25</sup> Catarsi writes «in such a context the adult-educator is very far from the traditional one which foresaw an individualistic approach based upon a hierarchical school order. All the adults operating in the school generate the school collective which has to run the educational intervention through cooperation even if that is not its specific goal» (E. Catarsi, *L'infanzia a scuola. L'educazione infantile in Italia dalle sale di custodia alla materna statale*, Bergamo, Juvenilia, 1985, pp. 225-226).

<sup>26</sup> Franco Frabboni, about *Orientamenti* '69, considers «a child with a handy heart and a head on the dole until he's 6. That is a child who should only feed feelings, imagination, with no mind's adventure, no knowledge's scandal» (F. Frabboni, *L'infanzia e la sua scuola*, in *Scienze dell'educazione e scuola dell'infanzia*, Roma, Nis, 1999, p. 29).

<sup>27</sup> C. Scurati, *Esperienza educativa e riflessione pedagogica. Analisi Incontri Commenti Letture*, Brescia, La Scuola, 2007, p. 194.

### *Towards a new child*

As Egle Becchi wrote in 1975:

the latest studies recognize the circularity of the socializing action which takes place interactively between child and adult. They demonstrate as a matter of fact that the child is active and he models actions of his interlocutors, that he is a socializing agent himself, and that the process is an intermingling of questions and answers where no hegemonies, priorities or submissions are allowed<sup>28</sup>.

That kind of recognition highlights a complex of studies and researches (Piaget and after) which reduces the role of the theoretical principles, such as 'egotism', 'childhood animism', 'physiological autism' to widen a widespread communicative competence and an opening of the child to the social relationships and culture. The kindergarten has acted as an exaltation tool for the 'new values' of the childhood such as sociability, cooperation, intellectual curiosity and the use of language<sup>29</sup>. Inside such a context together with obvious values (to be clean, honest, tidy, sociable)<sup>30</sup> attitudes of independence were encouraged, attitudes which helped the child to free himself from the mother underlining therefore the historically determined nature<sup>31</sup>. That has contributed to the shift from mere assistance to a structured educational character<sup>32</sup>. In fact

the widespread of the schooling education through the pre-school is not only due to the grown necessity of a care as an aftermath of mothers' widened activities. It is also due to the rising demand for education, differentiating according to the different social classes, that is linked to a change in the social definition of early childhood. It contributes too to the diffusion of this vision<sup>33</sup>.

<sup>28</sup> E. Becchi, *Introduzione*, in Ead. (ed.), *Il bambino sociale. Privatizzazione e deprivatizzazione dell'infanzia*, cit., p. 19. Similarly Cesare Scurati wrote in 1993: «the image of the child as a valid and active being, true speaker in his relation to the world, to the adult, and the other children, which the modern pedagogy has deepened, is the basic principle of every educational approach being the basis and the common positive heredity of our educational civilization and the future one» (C. Scurati, *Infanzia, famiglia e scuola della comunità europea*, in C. Scurati, H. Wintersberger, G.B. Sgritta, *La voce dei bambini*, Trento, Publiprint, 1993, p. 19).

<sup>29</sup> See C. Saraceno, *Alla scoperta dell'infanzia. La socializzazione del bambino: esperienze e teoria delle "comuni infantili"*, Bari, De Donato, 1978, p. 46.

<sup>30</sup> On order as educational value see M. Mencarelli, *Infanzia e cultura nella scuola materna agazziana*, Brescia, La Scuola, 1984, pp. 56 ss.

<sup>31</sup> Bonetta writes: «the kindergarten at the end of the day will have a primary social function. It will be inserted in the dynamic processes of the modern socialization with children prevailing from the families and giving back a standardized image of the child with homogenous level of growth and ability» (G. Bonetta, *La scuola dell'infanzia*, in G. Cives (ed.), *La scuola italiana dall'Unità ai giorni nostri*, Scandicci, La Nuova Italia, 1990, p. 45).

<sup>32</sup> For a historical vision see 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, E.D.E.S., 1997, pp. 21-56.

<sup>33</sup> J.C. Chamboredon, J. Prévot, *Il mestiere di bambino. Verso una sociologia dello spontaneo*, in Becchi (ed.), *Il bambino sociale. Privatizzazione e deprivatizzazione dell'infanzia*, cit., p. 151.



The kindergarten has become a wider and wider service since the 70s free from the women's issues. It has transformed into a mass service used by the non working mothers' children too<sup>34</sup>. It was based on the children's needs and rights due to their educability's condition which led to the introduction of the disabled children too, through that privileged lab.

So the pedagogical specificity of the kindergarten became gradually the core of a new distinction between family and school roles (think of the difference between propaedeutic and preparatory school).

The aims and functions of the game have played a crucial role for the ecological nature of the *Orientamenti* '91 thanks to that debate and the related question of the continuity/discontinuity of the educational agency for early childhood<sup>35</sup>. It has taken on many aspects during times as the pedagogists had always been praising it as a tailored tool for the child. See what the *Orientamenti* '69 foresaw concerning the spontaneous theory about playfulness

the child must be left free with his playing, alone or with the others. The educator shall not coordinate or rule the individual or collective playing or distract him for more important activities. Playing must be regarded as the most clarifying tool to understand the child's character and to measure his growth, health and emotions. The educator shall look for the causes of some abnormal behaviors and the possible solutions, but not intervene through prejudged idea.

That conception had not only the description of an activity but also its evaluation. Therefore there will be a more or less productive, an obsessive or free, solitary or social game. Play is not only an activity: it involves a theory from which an interpretation, evaluation and diagnosis (indicating a progression)

<sup>34</sup> Other than the kindergarten in the same years there were day cares. The law n. 1044 instituted them and it was brand new when it comes to laws. In particular «it recognizes the social value of motherhood and therefore the right of a mother – worker or not – to have a day care. Moreover it foresees the duty by the State to create social services which led to a new relation between State and citizens through the management of the districts as concerns the planning and through the town halls for the management of the service itself» (E. Catarsi, *L'asilo e la scuola dell'infanzia. Storia della scuola materna e dei suoi programmi dall'Ottocento ai giorni nostri*, Firenze, La Nuova Italia, 1994, p. 303).

<sup>35</sup> The *curriculum* (as didactic organized structure) of the kindergarten has been hindered for long mainly by the Catholic wing. Even within this array, however, there were contradictions. In fact Pazzaglia underlines that during some meetings of the editorial board of Editrice La Scuola, Aldo Agazzi accuses Cesare Scurati, responsible for the commission charged with writing of *Orientamenti* della scuola materna statale, «not to be able to avoid the model of the kindergarten designed in the *Orientamenti* which was similar to a school rather than a place where to live, which was understandable through the use of the words 'campi di esperienza educativa' o 'curricolo' [educational experience camps, *curriculum*]» (L. Pazzaglia, *Profilo biografico di Cesare Scurati*, in A. Antonietti, P. Triani (edd.), *Pensare e rinnovare l'educazione. Scritti in memoria di Cesare Scurati*, Milano, Vita e Pensiero, 2012, p. XXIX).

come. This theory is not known to the child, unlike the ones of the visible pedagogy<sup>36</sup>.

The lightness of the concept of the game has run its own risks of drifting away from the psycho-pedagogical basis of *Orientamenti* '69. Those documents stressed the diagnostics, therapeutical features of the game which was linked to the idea of a weak child to be protected rather than the social, cultural and socio-cognitive characteristics and the counter posed power and organization's dimension of the adulthood<sup>37</sup>. A game is capable to break the ties of the child dependency to become a social organizer far from the adults' schemes. It is therefore characterized by a divergent and creative language and a deconstruction-reconstruction of the reality.

The kindergarten's function has been given the right evaluation thanks to the progressive concept of the game as a child's right (see that right in the ONU declaration in 1959), to the necessity of a specific pedagogically controlled context where the socializing educational processes would take place – though as artificial as the new life conditions of the families and the entire society. That new vision has led to a spendable working time for the child as for the adult. A dedicated playing and learning space/time in a serene environment among peers in cooperation with the family's action. That time is socializing not only for the child but for the mother too who can enjoy the collective rites (take and pick up the children, the integration, the meeting with the educators, the parties, etc) as a mirror of being and performing the motherhood.

### *Conclusions*

The Italian kindergarten has gained a widespread diffusion and a cultural, pedagogical and political value. Scurati<sup>38</sup> wrote in 1993:

<sup>36</sup> See B. Bernestein, *Class and Pedagogies: visibile and invisibles*, Paris, OCDE, 1975.

<sup>37</sup> From the *Orientamenti*: «the educator will inform the family and the institutions concerned about symptoms or disturbances of the child regarding illnesses, irregular growth, intelligence being a responsible cooperater to recovery».

<sup>38</sup> Italian pedagogist (born in Milan in 1937, died there in 2011). He taught in Genova, Parma and then at Catholic University of the Sacred Heart of Milan where he was Professor of Didactics and Pedagogy. He cooperated with the Ministry of Education in the Commissions which reformed the *Programmi* (1985) and the *Orientamenti* (1991) (respectively for elementary and kindergarten school). Director of *Scuola materna* and *Dirigenti Scuola* at Editrice La Scuola of Brescia. He has a variety of research fields such as applied structuralism, pedagogy and media education.

the *Orientamenti* are part of a long tradition of documents – like the ones of 1914, 1958 and 1969 – which have been the basis for that kind of school that is appreciated and recognized also at international level<sup>39</sup>.

That appreciation has made the kindergarten a fundamental step in the child education and literacy, replacing the idea of being not influential or useless. The detachment from the charity services or *salle d'asile*, from the strictly constraining institutions, typical of our utopic collectives of our 1900, has built up the kindergarten as a nursery of human relations<sup>40</sup> contributing to the partial balancing of the huge amount of work on the woman's shoulders which is nowadays heavier as the single family has replaced the paternal based one. The socializing and institutional models for the childhood have shown – in our contemporary age – the proactive element of interaction of the child with the adult:

the children are cooperators, negotiators, producers and reproducers which means that they are not only helpers but also co-producers of their own persona development<sup>41</sup>.

That is to say that the children can build up their own childhood actively through routines, rituals and shared interpretations models. The activity at school «corresponds to the adult's work and it is equally indispensable just like the mature people's one»<sup>42</sup>.

The modern childhood sociology highlights the child's role as a structural one for the community identity and for the change of balance among generations. This meant that especially since the 60s in Italy the circularity of the educational relationship involved the childhood (and its school) making the child (and his teachers – men too) a potential educator of his parents. This occurred through a double movement: the “weaning” of the mothers from the sense of guilt hindering their emancipation (by a “good enough school” – as Winnicott said) and the “inclusion” of the fathers in the practices of child socialization (in the mediation of an institutional structure – the kindergarten – in the related management, and in the institutional working school groups)<sup>43</sup>.

<sup>39</sup> C. Scurati, *Gli Orientamenti per la scuola materna*, «Lettera dall'Italia», vol. 93, n. 8, p. 29.

<sup>40</sup> K.H. Read, *The Nursery School – A human relationships laboratory*, London, Saunders, 1961; It. transl. *La scuola materna. vivaio di relazioni umane*, Roma, Armando 1965.

<sup>41</sup> H. Hengst, H. Zeiher (edd.) *Die Arbeit der Kinder. Kindheitskonzept und Arbeitsteilung zwischen den Generationen*, Weinheim und Munchen, Juventa Verlag, 2000; It. trans. *Per una sociologia dell'infanzia*, Milano, FrancoAngeli, 2004, p. 26.

<sup>42</sup> H. Wintersberger, *Divisione del lavoro e distribuzione delle risorse*, in Hengst, Zeiher (edd.), *Per una sociologia dell'infanzia*, cit., p. 171.

<sup>43</sup> See L. Pati, *La funzione educativa del padre*, Brescia, La Scuola, 1981, especially pp. 167-182.



# Per un'educazione giovanile europea alla lettura: «Il premio europeo Città di Caorle» (1962-1968)

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*For European youth education to read: «The European prize of Caorle City» (1962-1968)*

ABSTRACT: The «European Award City of Caorle» was held from 1962 to 1968 and gave start to a qualified international debate on the children's literature. Giuseppe Flores d'Arcais and Anna Maria Bernardinis, scholars in science of education at the University of Padua, promoted a dialectic debate between scholars from various countries to encourage the best works of youth literature and to offer critic guidelines because they wanted to create an European education for young readers. Based on extensive archival unpublished, the essay reconstructs the developments of the Prize, outlines the relations between international institutions, including the IBBY, in the various editions shows the critical assessments on the literary works. The desire to improve the future of Europe from the literature and the love on reading youth, allowed to structure a network of European cultural studies and the circulation of works. These reasons allowed Italy to overcome self position in literary criticism and they gave a decisive contribution in the development of the epistemological status of children's literature.

EET/TEE KEYWORDS: History of Children's Reading; History of Children's Literature; Literary Criticism; Young Readers; Italy; XX<sup>th</sup> Century.

*Tornare a Caorle*

Città di Caorle, nome carezzevole  
 come il colore delle tue vetuste  
 pietre rosate,  
 l'ore trascorse nel lavoro assiduo  
 si son ritmate sul respiro ondosu  
 del tuo mare dal moto senza posa,  
 sullo stormire lento delle fronde  
 dei tuoi alberi dalla chioma viva  
 nel soffio dello zefiro  
 della brezza, del vento.  
 Un legame invisibile dell'anima  
 a te ci avvince ormai,  
 oggi che a te  
 vicini siamo,  
 domani quando  
 da te saremo lontani,  
 nel ricordo che riaffiora,  
 dolce, e cancella  
 spazio e tempo.  
 E dalla memoria  
 pronuncerà una parola  
 di speranza, di desiderio:  
 tornare, tornare a Caorle, tornare.

Mary, 13 settembre 1964<sup>1</sup>

L'omaggio poetico *Tornare a Caorle* di Mary Tibaldi Chiesa ad Anna Maria Bernardinis<sup>2</sup> a margine del «II Premio Europeo Città di Caorle» restituisce allo

<sup>1</sup> La presente poesia, *Tornare a Caorle*, firmata Mary e manoscritta su un foglio di carta intestata «Mary Tibaldi Chiesa», fa parte del ricco materiale documentario relativo all'attività svolta dalla Sezione di Letteratura Giovanile – Istituto di Pedagogia dell'Università degli Studi di Padova e conservato presso il Dipartimento di Filosofia, Pedagogia e Psicologia applicata dello stesso ateneo. Il lavoro di riordino e di necessaria catalogazione archivistica di tale cospicua documentazione è ora solo in una fase iniziale. Nel presente contributo si indicheranno gli estremi riportati sulle cassette e sui faldoni presi in esame e si è proceduto a numerare i documenti presenti in ciascun faldone rispettando la posizione e la volontà di conservazione trovata, anche là dove si è ravvisata qualche evidente inserzione documentaria cronologicamente posteriore. È gradito e doveroso qui ringraziare sentitamente il Prof. Giuseppe Zago e la Prof.ssa Donatella Lombello per aver generosamente consentito a chi scrive di accedere allo studio di tale documentazione. Archivio «Premio Pier Paolo Vergerio» (d'ora in avanti A PPPV), Cassetta Edizione 1964-1966, Faldone Scrittori, doc. 10, (1 f. fronte) del 13.9.1964.

<sup>2</sup> Per uno sguardo sulla multiforme attività di ricerca svolta da Anna Maria Bernardinis dagli anni Sessanta fino all'inizio del nuovo millennio si rinvia a L. Tellaroli, *Bernardinis Anna Maria, (ad vocem)*, in M. Laeng (ed.), *Enciclopedia pedagogica*, Brescia, La Scuola, 2003, Appendice A-Z, cc. 147-149; W. Bohm (ed.), *Dire, leggere, ascoltare. Saggi in onore di Anna Maria Bernardinis*, «Rassegna di Pedagogia», vol. 66, nn. 1-4, 2008.

studioso di oggi un frammento di relazioni di alto profilo culturale e umano che si sono intessute attorno al progetto di sviluppo della letteratura giovanile in chiave europea avviato nel 1962 dall'Istituto di Pedagogia dell'Università di Padova sotto la presidenza di Giuseppe Flores d'Arcais<sup>3</sup> e portato avanti con dedizione e acume da Anna Maria Bernardinis. Si trattò di un vero e proprio impegno di ricerca scientifica che la giovane Bernardinis, allora non ancora incardinata nell'ateneo patavino, ma già promettente studiosa del settore<sup>4</sup>, coltivò nel solco delle riflessioni sul personalismo attivate dal maestro Flores d'Arcais e intrecciate con la necessità di una rielaborazione critica della cultura del secondo dopoguerra e delle nuove sfide educative nate con la diffusione dei linguaggi cinematografici, radiofonici, televisivi e teatrali.

Mary Tibaldi Chiesa, invitata ai lavori della tavola rotonda come critico letterario<sup>5</sup>, fu figura emblematica e dalle plurime competenze letterarie, musicali e teatrali poste anche al servizio della politica in qualità di deputato nell'Italia Repubblicana. Tuttavia in fondo all'animo manteneva una natura eminentemente poetica in grado di donare nuove sfumature e colori all'appuntamento scientifico di Caorle. Il «lavoro assiduo» cui si fa cenno nei versi poetici, fu l'appuntamento della tavola rotonda, in realtà un convegno dal respiro internazionale europeo al quale parteciparono relatori di alto profilo che attivarono un dibattito a tutto tondo sui temi trattati e favorirono gli interventi di un folto pubblico qualificato di critici letterari del settore e di scrittori per ragazzi appositamente invitati. Ci si aspettava che dalle diverse prospettive di osservazione scaturisse un confronto dialettico costruttivo e linee di indirizzo lungo le quali avrebbero potuto muoversi le ricerche sulla letteratura giovanile in chiave europea. Come pare mostrare la poesia, Mary Tibaldi Chiesa si trovò molto bene in tale consesso internazionale che corrispondeva alla sua cultura letteraria e alla sua padronanza delle lingue straniere ma coincideva anche a una condivisione di vedute con gli organizzatori patavini rispetto all'importanza delle sinergie tra letteratura giovanile e altri media. Già da diversi anni aveva partecipato infatti

<sup>3</sup> Sugli studi approfonditi da Giuseppe Flores d'Arcais e attorno alle linee di ricerca sviluppate dall'Istituto di Pedagogia sotto la sua direzione, si rinvia a W. Bohm, L. Santelli Beccegato, G. Zago (edd.), *Il contributo della scuola padovana allo sviluppo delle scienze pedagogiche e didattiche. Fascicolo monografico*, «Rassegna di Pedagogia», vol. 72, nn. 3-4, 2014. In particolare si veda G. Zago, *Tra pedagogia e biografia. La ricerca storica di Flores d'Arcais*, *ibid.*, pp. 273-298.

<sup>4</sup> A.M. Bernardinis conseguì la libera docenza in Storia della Pedagogia nel 1966 all'età di trentaquattro anni e l'ordinariato nel 1976. Tellaroli, *Bernardinis Anna Maria*, cit., c. 147.

<sup>5</sup> Si ricorda qui di passaggio che il suo manuale sulla letteratura per l'infanzia, pubblicato nel 1944, oltre ad essere il primo con una visione democratica all'apertura della nuova pagina politica della vita del paese, fu anche il primo con una visione della disciplina di portata internazionale. Cfr. M. Tibaldi Chiesa, *La letteratura infantile*, Milano, Garzanti, 1944; S. Fava, *Chiesa Tibaldi Mary*, in G. Chiosso, R. Sani (edd.), *DBE: Dizionario biografico dell'educazione (1800-2000)*, 2 voll., Milano, Bibliografica, 2013, Vol. I, pp. 337-338.

con Giuseppe Flores d'Arcais ai lavori della giuria del Festival internazionale del film per ragazzi nell'ambito della Mostra del Cinema di Venezia<sup>6</sup>.

Al consesso scientifico di Caorle si affiancava la premiazione della migliore opera letteraria per ragazzi rispondente «alle essenziali finalità dell'educazione europea» e scelta da una commissione internazionale all'interno di una vasta gamma di testi inviati da editori dei vari paesi europei.

### 1. *Perché un Premio Europeo sulla letteratura giovanile*

I motivi alla base dell'istituzione nel 1962 del premio e contemporaneamente l'assunzione di una volontà qualificata e duratura di ricerca scientifica nel settore della letteratura per l'infanzia vanno rintracciati nella rinnovata attenzione culturale italiana verso questo ambito del sapere, punto nevralgico delle derive ideologiche sofferte nel ventennio fascista e, anche per questo, luogo di necessario ripensamento dell'educazione dell'uomo nuovo. Durante gli anni della ricostruzione post bellica nell'educazione aveva valore la riflessione espressa da Natalia Ginzburg in *Lessico familiare* dove sottolineava l'esigenza di «ritornare a scegliere le parole, a scrutarle per sentire [...] se avevano vere radici»<sup>7</sup>. Si trattava di dover riformulare un linguaggio e orizzonti di significato capaci non soltanto di occuparsi delle necessità immediate ma molto più per gettare basi prospettiche verso un futuro da costruire attorno a valori condivisi e condivisibili.

Le spinte di innovazione letteraria ed educativa, in un mercato editoriale che all'indomani della guerra viveva una condizione inerziale di prevalente recupero dei migliori successi già in catalogo, piuttosto di rischiosi investimenti in nuovi

<sup>6</sup> Giuseppe Flores d'Arcais fece parte della giuria del Festival del cinema per ragazzi di Venezia dal 1954 al 1964 e Mary Tibaldi Chiesa giunse a tale esperienza a seguito dell'impegno promosso a livello politico tramite un progetto di legge sulla cinematografia per ragazzi presentato nel 1950. Cfr. D. Boero, *All'ombra del proiettore. Il cinema per ragazzi nell'Italia del secondo dopoguerra*, Macerata, eum, 2013, pp. 54 e 113-117. Della comune partecipazione al Festival vi sono diversi riferimenti nelle comunicazioni di ordine organizzativo gravitanti attorno al «Premio Città di Caorle», oltre ad essere conservato un interessante documento del 1964 nel quale si prevedeva l'istituzione del premio «Lampada di Aladino» sotto il patrocinio del Dipartimento di Pedagogia-sezione Letteratura giovanile. Tale premio, che intendeva porsi in collaborazione con la Mostra internazionale cinematografica di Venezia, si proponeva di aprire uno spazio sulla produzione di pellicole non già destinate a un pubblico giovanile ma a lavori che, pur offrendo spaccati sull'infanzia, si rivolgessero agli educatori per favorire la loro riflessività sul mondo del bambino. La giuria prevedeva al suo interno: P. Eugenio Bruno s. j., Michele Gandin, Fernand Rigot, Mary Tibaldi Chiesa, Anna Maria Bernardinis e il premio del 1964 andò a *Bambini senza amore*, film cecoslovacco del regista Kurt Goldberger. APPPV, Cassetta edizione 1964-66, Spese di traduzione e di segreteria, Faldone Premio Lampada di Aladino, doc., 1.

<sup>7</sup> N. Ginzburg, *Lessico familiare*, Torino, Einaudi, 1963, pp. 162-163.



titoli<sup>8</sup>, provennero non marginalmente dai dibattiti culturali e dai convegni promossi attorno alla prima rivista specializzata «Schedario»<sup>9</sup> che Giovanni Calò, a capo del Centro Didattico Nazionale di studi e di Documentazione di Firenze<sup>10</sup>, nel 1953 aveva affidato alla direzione di Enzo Petrini<sup>11</sup>. Il cuore pulsante della rivista e la mente ideativa e organizzativa di Enzo Petrini ma anche di Maria Guaspari Bartolozzi<sup>12</sup> e di Carla Poesio<sup>13</sup>, avevano permesso da subito a Petrini di interfacciarsi con i più autorevoli studiosi della disciplina in ambito internazionale<sup>14</sup> che proprio nel 1953 avevano dato vita all'IBBY (International board on books for young people)<sup>15</sup> e Petrini entrò a far parte

<sup>8</sup> Lo scenario editoriale per ragazzi dell'immediato dopoguerra con le sue secche e posizioni prudentziali è ben tratteggiato negli atti di alcuni convegni nazionali degli anni Cinquanta e inizi del decennio successivo. Cfr. ONAS, (Ordine Nazionale Autori e Scrittori), *Atti del I Convegno nazionale «Cultura e gioventù»*, Milano, Arti Grafiche E. Milli, 1956; *Atti del II convegno nazionale degli scrittori per l'infanzia e la gioventù (Bologna, 15-17 dicembre 1956)* «Schedario», 1957; *Atti del terzo convegno nazionale degli scrittori per la gioventù e l'infanzia*, (Bologna, 28-30 novembre, 1959), Imola, Galeati, 1960; Società Umanitaria, *Letteratura giovanile e cultura popolare in Italia. Atti del Convegno svoltosi a Torino dal 2 al 4 giugno 1961*, Firenze, La Nuova Italia, 1962.

<sup>9</sup> La rivista «Schedario» nacque nel 1953 come supplemento del bollettino «Il Centro» del Centro Didattico Nazionale di Studi e di documentazione di Firenze. Ebbe inizialmente periodicità varia per divenire mensile a partire dal 1956 e proseguì le proprie pubblicazioni fino al 1998 modificando nel tempo la periodicità.

<sup>10</sup> Il ruolo di Giovanni Calò all'interno dell'allora Centro Didattico Nazionale di Studi e di Documentazione (si ricorda che la denominazione cambiò nel tempo: dalla Mostra Didattica Nazionale del 1925 nacque nel 1929 e fino al 1938 il Museo didattico; nel 1939 al museo si affiancò la Biblioteca Nazionale Pedagogica ed entrambi confluirono nel 1942 nel Centro Didattico Nazionale e dal 1953 assunse il nome di CDN di studi e Documentazione; nel 2001 assunse la denominazione di Istituto nazionale di documentazione, innovazione e ricerca educativa – INDIRE – e dal 2007 Agenzia Nazionale per lo sviluppo dell'Autonomia scolastica – ANSAS) è tratteggiato da E. Petrini, *Giovanni Calò (ad vocem)*, in Laeng (ed.), *Enciclopedia pedagogica*, cit., vol. 2, cc. 2123-2131.

<sup>11</sup> Per riferimenti biografici su Enzo Petrini si rinvia a R. Lollo, *Sulla letteratura per l'infanzia*, Brescia, La Scuola, 2003, pp., 232-233.

<sup>12</sup> Per brevi cenni biografici su Maria Bartolozzi Guaspari si veda *ibid.*, p. 235.

<sup>13</sup> Sull'operato di Carla Poesio presso il CDN e successivamente nel 1964 nella nascita della Fiera del Libro per ragazzi di Bologna si veda C. Poesio, *Gli inizi*, in G. Grilli (ed.), *Bologna. Cinquant'anni di libri da tutto il mondo*, Bologna, Bononia, University Press, 2014, p. 51.

<sup>14</sup> Si rivelò fondamentale la conoscenza di Jeanne Cappe, giornalista e docente di letteratura all'Università di Lovanio poiché permise a Petrini di venire a conoscenza con il clima di rinnovamento attorno alla lettura che istituzioni come quella belga, ovvero il *Centre International de littérature de jeunesse*, promuovevano nei paesi francofoni. Lollo, *sulla letteratura per l'infanzia*, cit., p. 234. Si vedano opportunamente i seguenti articoli scritti dalla stessa Jeanne Cappe sull'operato del Centro studi di Bruxelles: J. Cappe, *Le Conseil de littérature de jeunesse*, «International review of education», vol. 2, n. 3, 1956, pp. 382-383.

<sup>15</sup> La nascita dell'IBBY è dovuta all'idea visionaria di Jella Lepman che nel novembre del 1951 nel corso del congresso di Monaco *International understanding through children's books*, condivise il progetto con Richard Bamberger (che nel 1949 aveva dato vita in Austria al *The Austrian children's book club*), e con Erich Kästner, noto scrittore tedesco i cui libri furono bruciati dal Nazismo. L'idea di educazione dei giovani alla pace spinse gli intellettuali a dare concretezza ai loro valori e dopo una riunione a Monaco nel 1952 (alla quale presero parte, oltre a Austria e

dell'Assemblea generale dell'organizzazione divenendone presidente nel 1958 in occasione del V congresso che si tenne a Firenze<sup>16</sup>.

I rapporti significativi intrattenuti da Giuseppe Flores d'Arcais con Giovanni Calò anche per vicinanza di prospettive teoretico-pedagogiche e non meno con Enzo Petrini, sembra di poterli porre come relazioni fondamentali che in qualche modo favorirono alcuni contatti europei per dare vita al «Premio Letterario Città di Caorle» al quale, come si dirà più avanti, i due esponenti di Palazzo Gerini presero parte in varie edizioni. Certamente vi era la condivisione della spinta europeistica che avvicinava, almeno al principio, l'iniziativa patavina al progetto visionario di Jella Lepman. La Lepman nel 1951 aveva dato vita alla Biblioteca di letteratura giovanile di Monaco e due anni più tardi all'IBBY, affinché si ripartisse proprio dai bambini per dar loro libri, ovvero «cibo per la mente»<sup>17</sup> e così si risollevarono con fiducia e speranza dalle macerie materiali e spirituali provocate dalla seconda guerra mondiale.

Anche per Flores d'Arcais e per A.M. Bernardinis occorreva raccogliere le sfide educative di un mondo che si trovava a fare i conti con una storia recente di dolorose proporzioni. Di fronte alla Guerra Fredda e alle divisioni imposte dal Muro di Berlino, necessitavano guide e orientamenti affinché l'idea di Europa non si risolvesse nel Mercato Comune Europeo squalificando la centralità culturale ed educativa custodita invece in essa. La paura di una deriva pragmatica e utilitaristica generata dal benessere faceva altresì da sfondo alle prospettive delineate da Giuseppe Flores d'Arcais per una «pedagogia europea»<sup>18</sup>. Per lo studioso patavino essa avrebbe dovuto fondarsi sulla tradizione classica e greco-cristiana che aveva dato vita alla comune identità spirituale dei popoli europei per essere «accolta attraverso la coscienza critica dei problemi della educazione e in ordine alle esigenze culturali ma anche politiche del [...] tempo»<sup>19</sup>. Quindi l'uomo europeo, nel richiamarsi alla tradizione valoriale comune, avrebbe trovato le fondamenta per «creare, [...] sviluppare, [...] consolidare la società degli uomini come società di persone parlanti, e dunque pensanti e quindi agenti in libertà e in responsabilità»<sup>20</sup>.

a Germania, Olanda, Norvegia, Svezia e Svizzera), nel Congresso di Zurigo del 1953 l'organismo venne formalmente costituito e l'Italia fu rappresentata da Enzo Petrini che venne eletto a far parte dell'Assemblea Generale. R. Bamberger, *Survey of the history of the International board on books for young people*, in R. Bamberger, L. Binder, B. Hurlimann, *20 years of the international board on books for young people*, Czechoslovakia, 1973, pp. 11-17.

<sup>16</sup> Nel corso del V Congresso «Letteratura giovanile e opinione pubblica» [Juvenile literature and public opinion], svoltosi a Firenze nel maggio del 1958, Petrini fu eletto IV presidente dell'IBBY. *Ibid.*, p. 22. Gli atti del Congresso sono stati pubblicati in «Schedario», nn. 3-4, 1960.

<sup>17</sup> J. Lepman, *La strada di Jella. Prima fermata Monaco*, Roma, Sinnos, 2009, p. 114 (Titolo originario: J. Lepman, *Die Kinderbuchbrücke*, Frankfurt am Main, Fischer, 1964).

<sup>18</sup> G. Flores d'Arcais, *Prospettive per una pedagogia europea*, «Rassegna di pedagogia», vol. 18, nn. 1-2, 1963, pp. 3-16.

<sup>19</sup> *Ibid.*, p. 15.

<sup>20</sup> *Ibid.*, p. 16.

In continuità rispetto a tale visione si sarebbe collocata la ricerca sulla letteratura giovanile di Anna Maria Bernardinis, poiché ella identificò nella tradizione storico-pedagogica internazionale la dimensione europeistica della scrittura e della lettura per i bambini. Autori di provenienza diversa come Fénelon, Gozzi, Rousseau, Froebel e la Necker de Saussure offrirono alla studiosa nuclei portanti attorno ai quali innestare nel tempo la riflessione critica sulla disciplina<sup>21</sup> e a saldare il momento speculativo rispetto all'azione progettuale di promozione della lettura nell'ambito del Premio letterario, come pure nell'organizzazione della biblioteca di Letteratura giovanile dell'ateneo di Padova che a lei avrebbe fatto capo. Dal punto di vista dei contenuti il recupero della tradizione europea significava valorizzare il «mito, comune ancestrale punto di partenza d'ogni uomo»<sup>22</sup>. Voleva dare spazio alla fiaba che col suo «germe di poesia»<sup>23</sup> permetteva all'evasione nel meraviglioso di divenire modalità per interpretare la realtà. Significava conferire importanza al romanzo storico non unicamente di impronta nazionale. Secondo A.M. Bernardinis in tale itinerario ideale l'uomo sarebbe stato condotto alla scoperta di se stesso, dell'altro e avrebbe potuto offrire il proprio originale contributo alla costruzione di un'unità spirituale tra popoli e base per la nascita della comunità europea.

La motivazione educativa europeistica a fondamento del «Premio Città di Caorle» andò crescendo accanto a nuove richieste provenienti da un sistema scolastico nazionale italiano che proprio nel 1962 varò la riforma della Scuola Media Unica e l'innalzamento dell'obbligo scolastico fino a quattordici anni di età. Le ricadute nel settore della letteratura per l'infanzia furono plurime. L'introduzione dell'ora di narrativa obbligatoria negli ultimi due anni della scuola media prospettò nuovi spazi di sviluppo editoriale. Nel contempo si delinearono nuovi bisogni formativi da parte dei docenti e dunque l'accademia doveva individuare piste di lavoro congruenti al panorama scolastico in via di trasformazione. Importanti sinergie si realizzarono contemporaneamente in ambito extrascolastico con l'avvio proprio nel 1962 del *Piano L* del libro e della lettura che prevedeva la diffusione di un sistema bibliotecario nazionale per i

<sup>21</sup> Nel saggio *Autorevolezza letteraria ed educativa* del 1993 A.M. Bernardinis sostiene di aver ripreso da Gozzi l'idea dell'esistenza di un dialogo formativo tra l'autore e un pubblico specifico nel tempo e nello spazio. Tale dimensione dialogica fu poi sviluppata da Rousseau che la studiosa assume come riferimento perché egli ebbe coscienza della responsabilità autoriale e dunque della sua valenza pedagogica in senso dialogico ovvero in relazione alla costruzione condivisa di nuovi modi di vivere e di agire dell'uomo. Froebel, e prima di lui Pestalozzi, affidarono alla parola scritta un alto compito educativo nei riguardi del popolo tedesco, non solo curando il piano del messaggio ma ponendo grande cura nella modalità comunicativa rispettosa dell'interlocutore. Dalla scrittura di Albertine Necker de Saussure riprende il valore comunicativo della scrittura come possibilità di perfezionamento interiore. Cfr. A.M. Bernardinis, *Autorevolezza letteraria ed educativa*, «Rassegna di pedagogia», vol. 51, n. 3, 1993, pp. 199-207.

<sup>22</sup> A.M. Bernardinis, *La letteratura per fanciulli e la comunità europea*, «Rassegna di pedagogia», vol. 18, nn. 1-2, 1963, pp. 32-36.

<sup>23</sup> *Ibid.*, p. 33.

ragazzi in grado di sostenere la loro formazione culturale<sup>24</sup>. Scuola ed extrascuola dunque chiedevano scambievolmente al mondo accademico di sostenere gli sviluppi dell'educazione alla lettura e lungo tali direttrici si innervarono le principali piste di ricerca dell'Università di Padova sia promuovendo la nascita della Biblioteca di letteratura giovanile sia dando vita al Premio Letterario<sup>25</sup>.

La denominazione di letteratura giovanile, assunta stabilmente nell'indicazione del premio solo dal 1964, fu senza dubbio l'esito di un percorso di ricerca e di delimitazione epistemologica che avvenne non marginalmente in seno ai lavori del premio stesso<sup>26</sup>. Se infatti nei contributi più maturi di A.M. Bernardinis l'espressione letteratura giovanile divenne una scelta e una difesa non tanto in riferimento a una più ampia estensione temporale di destinazione d'uso dell'opera letteraria, quanto semmai in relazione all'essere parte integrante del dialogo educativo e in esso alla possibile apertura libera e consapevole al leggere concorrendo alla progettualità del sé in crescita<sup>27</sup>, all'inizio degli anni Sessanta questo statuto epistemologico non era ancora elaborato e le denominazioni di letteratura per l'infanzia e di letteratura giovanile si alternarono tra un piano

<sup>24</sup> Sull'evoluzione del sistema bibliotecario nazionale destinato ai ragazzi nel secondo dopoguerra si rinvia alla documentata ricostruzione offerta da D. Lombello, *La letteratura per l'infanzia a Padova: per una pedagogia della lettura e della letteratura giovanile*, in Bohm, Santelli Beccagato, Zago (edd.), *Il contributo della scuola padovana allo sviluppo delle scienze pedagogiche e didattiche. Fascicolo monografico*, cit., pp. 310-312.

<sup>25</sup> Entrambe le iniziative fecero parte di un'apposita Sezione del Dipartimento di Pedagogia denominata dapprima Sezione di Letteratura giovanile (almeno fino alla fine degli anni Sessanta) per poi acquisire la denominazione di «Settore di ricerca sulla pedagogia della lettura e della letteratura giovanile». Solo più accurate ricerche archivistiche potranno chiarire quando avvenne tale cambiamento, poiché nelle ricostruzioni dell'esperienza patavina offerte dalla stessa Bernardinis non sono precisati tali passaggi temporali. Cfr. A.M. Bernardinis, *Pedagogia della lettura e della letteratura all'Università*, «Orientamenti Pedagogici», n. 3, 1997, pp. 627-636; A.M. Bernardinis, *Storia e struttura del Settore di ricerca sulla pedagogia della lettura e della letteratura giovanile dell'Università di Padova*, «History of education & children's literature», vol. 2, n. 2, 2006, pp. 417-428; Ead., *University research and children's literature*, «Ooohéee», n. 2, 2006, pp. 4-12.

<sup>26</sup> Nella documentazione relativa al «Premio Europeo città di Caorle» l'espressione letteratura giovanile non compare negli annunci ufficiali delle varie edizioni volte a richiamare l'opinione pubblica, né è adottato nella relazione di A.M. Bernardinis del 1962 (Bernardinis, *La letteratura per fanciulli e la comunità europea*, cit.). Invece l'espressione figura nel titolo della conferenza tenuta a Lubiana nel marzo del 1963: A.M. Bernardinis, *Tendenze della letteratura giovanile d'oggi in Italia*, «Rassegna di Pedagogia», vol. 18, n. 3, 1963, pp. 284-291 e nel saggio A.M. Bernardinis, *Per una ricerca pedagogica sulla letteratura giovanile*, in G. Flores d'Arcais, *La ricerca pedagogica*, Bari, Laterza, 1964. È inoltre adottata nel 1964 in alcuni documenti interni ai lavori della giuria. Si vedano: *Elenco dei libri inviati alla giuria del II premio europeo Città di Caorle* APPPV, Cassetta Edizione 1964-1966, Faldone II 1964, doc. 2, (6 f. fronte). L'espressione è correntemente adottata nella documentazione delle edizioni del premio del 1966 e del 1968 e diviene oggetto di ricerca scientifica in A.M. Bernardinis, *Pedagogia della letteratura giovanile*, Padova, Liviana, 1971.

<sup>27</sup> Bernardinis, *Pedagogia della letteratura giovanile*, cit., pp. 178-182; Id., *Narrazione e pedagogia. Appunti per una ricerca*, in G. Flores d'Arcais (ed.), *Pedagogie personalistiche e/o pedagogia della persona*, Brescia, La Scuola, 1994, pp. 21-30; Id., *Letteratura giovanile*, in Laeng (ed.), *Enciclopedia pedagogica*, cit., cc. 6717-6732.

nazionale, dove le espressioni infanzia o infantile si inseguivano correntemente nella manualistica e nel linguaggio comune, e un piano internazionale dove il termine giovanile era maggiormente adottato. Seguendo questa prospettiva internazionale, già Petrini nel 1958 aveva scelto per primo in Italia l'espressione letteratura giovanile per il proprio manuale<sup>28</sup>. Stabili e fecondi scambi con gli studiosi europei orientarono la riflessione e le scelte della giovane ricercatrice patavina verso l'utilizzo di un linguaggio nel quale potesse riconoscersi il lavoro di scavo che andava delineando. Così l'espressione letteratura giovanile entrò anche a indicare uno specifico ambito di studi e di ricerca dell'Istituto di Pedagogia di Padova posto sotto la direzione di Anna Maria Bernardinis: la Sezione di Letteratura giovanile<sup>29</sup>.

Un ulteriore e non marginale ordine di motivazioni a fondamento del «Premio Città di Caorle» riguardava l'idea stessa del premio che non si innestava su un già consolidato e specifico terreno di ricerca, semmai, al contrario, curiosamente lo precedeva. La promozione della letteratura per l'infanzia in Italia non era certo nuova all'idea di premi. Basterebbe qui pensare solo di passaggio che i suoi stessi inizi storici vanno ricondotti a quel premio letterario bandito dal Conte Bettoni di Brescia a fine Settecento che poi diede la notorietà alle *Novelle morali* del Padre Francesco Soave. Più tardi non mancarono gli scopi ideologici del premio istituito dal fascismo a margine del celebre convegno del 1938 e vinto ex aequo da Pina Ballario e da Daria Banfi Malaguzzi Valeri. E nel secondo dopoguerra si diffusero concorsi letterari di portata nazionale o locale patrocinati da Fondazioni come il «Premio Laura Orvieto» o il «Premio Castello» oppure più comunemente dal mondo editoriale e libraio come il «Bancarellino», il Premio della Sei di Torino o ancora «Il Premio per la bontà città di Bologna»<sup>30</sup>. Invece per la prima volta un premio fu istituito da un'Università e, come sostenne la stessa Bernardinis, ciò avrebbe assicurato all'iniziativa indipendenza dal mercato editoriale sia nella composizione della giuria sia nella valutazione delle opere elaborata attorno a criteri scientifici e rigorosi<sup>31</sup>. Invece sul piano internazionale rispetto al Premio Andersen, il cosiddetto Nobel per la letteratura per ragazzi istituito dal 1956 dall'IBBY, l'iniziativa patavina si differenziò principalmente perché mirava a premiare singole opere e non l'intera attività produttiva

<sup>28</sup> E. Petrini, *Avviamento critico alla letteratura giovanile*, Brescia, La Scuola, 1958. Come tuttavia ricorda R. Lollo, in Petrini l'espressione giovanile contrassegnava la più ampia età anagrafica riconosciuta al destinatario fruitore dell'opera letteraria. Cfr. Lollo, *Sulla letteratura per l'infanzia*, cit., p. 236.

<sup>29</sup> Nella ricostruzione effettuata da Donatella Lombello l'avvio della «Sezione di Letteratura giovanile» viene fatta risalire al 1962, mentre nella documentazione archivistica rintracciata relativa al Premio letterario tale denominazione compare nell'instestazione dei documenti a partire dal 1964 (APPPV, Cassetta Edizione 1962-1964, 1966-68, 1973, Faldone II 1964, doc. 5).

<sup>30</sup> Per un primo sguardo a tale ambito P. Boero, C. De Luca, *La letteratura per l'infanzia*, Roma-Bari, Laterza, 2009<sup>2</sup>, pp. 241-242 e anche S. Fava, *Dal «Corriere dei piccoli» Giana Anguissola scrittrice per ragazzi*, Milano, Vita e Pensiero, 2009, pp. 35-36.

<sup>31</sup> Bernardinis, *University research and children's literature*, cit., p. 5.

di uno scrittore. Diverso ancora sarebbe stato l'orientamento seguito dagli organizzatori della Fiera del Libro di Bologna che sarebbe nata nel 1964 poiché, dopo una prima edizione nella quale furono istituiti il Balanzone d'Oro come riconoscimento letterario e il Torchio d'oro per la qualità illustrativa, dal 1966 il premio acquisì una connotazione internazionale con una specificità nell'ambito grafico (Premio Grafico Fiera di Bologna) e con la valorizzazione di una giuria di ragazzi (Premio Critici in Erba)<sup>32</sup>. Senza altro in questo panorama di vitale cambiamento il «Premio Città di Caorle» si ritagliò uno spazio per esprimere potenziali di originalità e di sviluppo che meritano di essere ora indagati nel dettaglio.

## 2. Origini e sviluppi del «Premio Europeo Città di Caorle»

La nascita del Premio fu il frutto di una positiva concertazione tra l'Istituto di Pedagogia dell'Università di Padova e il Comune della località balneare di Caorle in provincia di Venezia. L'antico centro costiero, tradizionalmente dedito alla pesca e solo nel dopoguerra in via di affermazione in ambito turistico, organizzava da tempo eventi culturali che fossero di richiamo e proprio nel 1962, nell'ottica di implementazione e di diversificazione di tali manifestazioni<sup>33</sup>, il Consiglio Comunale accolse la proposta dell'ateneo patavino di istituire «un premio biennale intitolato alla Città di Carole di £ 1.000.000 da assegnare ad un'opera edita od inedita di uno scrittore appartenente ad uno dei paesi del M.E.C.»<sup>34</sup>.

Il «Premio Città di Caorle» si tenne regolarmente secondo gli intenti iniziali dal 1962 al 1968<sup>35</sup>. Successivamente l'ateneo di Padova individuò nella provincia

<sup>32</sup> Un'interessante ricostruzione dei premi e delle opere vincitrici nella storia della Fiera del Libro di Bologna è presente in W. Grandi, *La vetrina magica*, Pisa, Edizioni Ets, 2015, pp. 12-13.

<sup>33</sup> Gli atti del consiglio Comunale di Caorle riferiscono che nel centro di villeggiatura nel mese di settembre di ogni anno si svolgeva una mostra e l'annesso «Premio di pittura Caorle» ma che proprio nel 1962, nonostante fosse già avvenuto uno stanziamento apposito nel bilancio annuale, tale manifestazione non avrebbe potuto svolgersi. Ciò spinse gli amministratori a ripensare le scelte culturali e a introdurre un'alternanza tra il tradizionale Premio di Pittura e la nuova iniziativa di un premio letterario per ragazzi. Archivio Comune di Caorle, Verbali Consiglio Comunale, (d'ora in avanti ACC, Verb. Cons. Com.) del. n. 233, n. 10955 di prot., 17 agosto 1962.

<sup>34</sup> Il bando del «Premio Città di Caorle» per un libro destinato all'infanzia (fino agli 11 anni) è allegato alla delibera comunale che lo istituiva e un'altra copia è conservata presso l'Università di Padova. Cfr. ACC, Verb. Cons. Com. del. n. 233, n. 10955 di prot., 17 agosto 1962 doc. 1 all.; APPPV, Casseta Edizione 1962-1964, Faldone I 1962, doc. 1, (1 f. fronte).

<sup>35</sup> Nelle varie edizioni «Il Premio europeo Città di Caorle» si tenne nei seguenti giorni: 27-28 settembre 1962; 11-13 settembre, 1964; 17-18 settembre 1966; 15-18 settembre 1968. Cfr. APPPV, Casseta Edizione 1962-1964., Faldone I 1962, doc. 3, (3 f. fronte); APPPV, Casseta Edizione 1962-1964, Faldone II 1964, doc. 6, (1 f. fronte); APPPV, Casseta Edizione 1962-1964..., Faldone III 1966, doc. 3, (2 f. fronte); APPPV, Casseta Edizione 1962-1964..., Faldone

autonoma di Trento un altro partner economico e dal 1973 il premio, sempre con prospettiva europea, avrebbe assunto la denominazione «Premio Trento» fino all'edizione del 1980. Divenne da ultimo intitolato a «Pier Paolo Vergerio» e sostenuto dalla provincia di Padova dal 1985 fino alla sua conclusione, avvenuta nel 1993<sup>36</sup>.

La documentazione archivistica finora nota non consente di capire i passaggi che precedettero la sua istituzione nel 1962. Certamente l'impegno economico del Comune di Caorle non fu irrilevante se, alla cifra destinata all'opera premiata, si aggiungono i costi organizzativi per l'ospitalità dei partecipanti. Mentre d'altro canto l'organizzazione scientifica in capo a Flores d'Arcais e ad A.M. Bernardinis stabilì subito il carattere internazionale della giuria. Presieduta dallo stesso direttore del Dipartimento di pedagogia di Padova, avrebbe dovuto prevedere quattro membri italiani e tre dei paesi appartenenti al M.E.C. e a tale rosa di commissari avrebbero potuto aggiungersi esperti del settore senza diritto di voto<sup>37</sup>.

I rapporti esteri si incentrarono attorno a rappresentanti di istituzioni pubbliche impegnate nei rispettivi paesi nella promozione della lettura e della letteratura per l'infanzia. Presero parte ai lavori della giuria di tutte le edizioni del «Premio Città di Caorle» Eudes de la Potterie, che al tempo era Segretario generale della Sezione sulla stampa e la letteratura per l'infanzia del B.I.C.E. (Bureau International Catholique de l'Enfance) di Parigi, Antoinette Ducimetiere, direttrice del Dipartimento dell'Educazione del Centro Europeo della Cultura di Ginevra e Walter Scherf, a capo della Biblioteca internazionale per la gioventù di Monaco. A questo gruppo originario, collegato ai contatti coltivati da Flores d'Arcais in area francofona nelle proprie ricerche pedagogiche e forse anche da A. M. Bernardinis, nell'edizione del 1964 si aggiunsero giurati di altre aree nel frattempo conosciuti nel corso di Congressi internazionali gravitanti attorno all'IBBY. Significativa fu senz'altro l'entrata di Jack Morpurgo<sup>38</sup>, Direttore Generale del National Book League di Londra e di Richard Bamberger di Vienna, allora Presidente dell'IBBY<sup>39</sup>. Ad essi si aggiunse Alice De Rycke che presiedeva il Consiglio sulla letteratura

IV 1968, doc. 6, (2 f. fronte).

<sup>36</sup> Mentre A.M. Bernardinis nei propri saggi si sofferma principalmente sull'ultima fase del premio, e infatti lo ricorda come «Premio Pier Paolo Vergerio» (Bernardinis, *Pedagogia della lettura e della letteratura all'Università*, cit., pp. 627-636; Bernardinis, *Storia e struttura del Settore di ricerca sulla pedagogia della lettura e della letteratura giovanile dell'Università di Padova*, cit., pp. 417-428; Ead., *University research and children's literature*, cit., pp. 4-12), di recente Donatella Lombello ne ha chiarito la diversa titolazione: Lombello, *La letteratura per l'infanzia a Padova: per una pedagogia della lettura e della letteratura giovanile*, in Bohm, Santelli Beccagato, Zago (edd.), *Il contributo della scuola padovana allo sviluppo delle scienze pedagogiche e didattiche*, cit., p. 319.

<sup>37</sup> *Ibid.*

<sup>38</sup> Per un riferimento biografico sintetico su J. Morpurgo si veda [s.a.] *Professor Jack Morpurgo*, «Telegraph», 16 ott. 2000, Mentre per un inquadramento sull'operato della National Book League si rinvia a C. Simmons, *The National Book League*, «Elementary English», n. 2, 1971, pp. 210-214.

<sup>39</sup> Per un primo sguardo biografico su R. Bamberger si veda P. Schneck, *Richard Bamberger 1911-2007*, «Bookbird», n. 1, 2008, pp. 65-66.

giovanile di Bruxelles raccogliendo il testimone della fondatrice Jeanne Cappe<sup>40</sup>. In particolare Bamberger, attento a sviluppare legami culturali con i paesi dell'est europeo<sup>41</sup>, così come nell'IBBY aveva coinvolto l'area slava attraverso il Congresso di Lubiana del 1966 e l'elezione di Zorka Persic come presidente al termine del proprio mandato<sup>42</sup>, allo stesso modo nella giuria del «Premio Città di Caorle» tra il 1966 e il 1968 favorì l'entrata della stessa Persic accanto ad Anna Przeclawska di Varsavia e di Jan Červenka di Praga<sup>43</sup>. È apprezzabile anche l'allargamento della prospettiva verso i paesi del Nord con l'adesione di Aase Bredsdorff della Biblioteca nazionale di Copenaghen. Gli sviluppi intervenuti con l'allargamento dei membri della giuria estera testimoniano la vitalità dell'iniziativa. Seppe coagulare attorno a sé nuove voci e consolidare quelle più antiche. Permise nel tempo di trovare nuovi equilibri tra le competenze del mondo bibliotecario inizialmente rappresentato e le conoscenze scientifiche del mondo accademico che a poco a poco si inserì. Ma soprattutto il Premio fu in grado di amalgamare coraggiosamente esperienze culturali di diverse tradizioni nazionali riuscendo in nome della letteratura giovanile a raggiungere obiettivi di là da venire a livello politico: le divisioni tra Europa occidentale e orientale tentavano di trovare tavoli di incontro e di dibattito per l'amore della letteratura, dell'infanzia e di un'idea di cittadinanza europea.

Nel corso delle quattro edizioni del Premio intervennero cambiamenti significativi per quanto riguarda la componente italiana della giuria. Infatti il regolamento dell'edizione del 1962 prevedeva che almeno quattro membri dovessero essere italiani. Invece tale principio venne modificato nelle edizioni successive colmando l'evidente sbilanciamento valutativo che nei fatti altrimenti avrebbe inficiato la finalità primaria europeistica del Premio. Nel panorama italiano in principio gli organizzatori interpellarono critici letterari che si erano distinti per la loro produzione manualistica. Pare di leggersi in tal senso l'invito rivolto a Antonio Lugli e a Luigi Santucci ai quali si aggiunse Ada Marchesini Gobetti, direttrice del «Giornale dei Genitori» e del «Centro studi per la letteratura infantile» di Torino. Lugli e Santucci esprimevano una certa sintonia di vedute nel conferire spessore psicologico alle loro analisi critiche e nell'offrire uno sguardo acutamente europeo alla letteratura per l'infanzia entro un'area culturale di impronta cattolica<sup>44</sup> e in tal senso presentavano una contiguità di vedute rispetto agli stessi studiosi dell'ateneo padovano. Diversa era la posizione laica di Ada Gobetti, vicina al partito comunista

<sup>40</sup> Cappe, *Le Conseil de littérature de jeunesse*, cit.

<sup>41</sup> Pare che la volontà di superare il blocco tra Europa dell'Ovest ed Europa dell'Est fosse presente tra le intenzioni dei fondatori dell'IBBY. Cfr. Schneck, *Richard Bamberger 1911-2007*, cit., p. 65.

<sup>42</sup> Bamberger, *Survey of the history of the International board on books for young people*, cit., p. 38.

<sup>43</sup> APPPV, Casseta Edizione 1962-1964, Faldone IV 1968, doc. 7.

<sup>44</sup> Mentre di Luigi Santucci era riconosciuto lo spessore interpretativo del manuale del 1942 *Limiti e ragioni della letteratura infantile*, di Antonio Lugli poteva essere apprezzabile lo sguardo europeo dell'edizione del 1960 di *Storia della letteratura per l'infanzia*. Cfr. Lollo, *Sulla letteratura per l'infanzia*, cit., pp. 216-219.



italiano. In questo senso appaiono apprezzabili le scelte coraggiose di oltrepassare steccati ideologici in nome delle riconosciute competenze culturali specifiche di ciascun membro della giuria. L'unico obiettivo consisteva nell'attivare un serio confronto dialettico per un'accresciuta consapevolezza rispetto ai bisogni formativi dei giovani lettori. Di fatto nel settembre del 1962 Antonio Lugli fu impossibilitato a prendere parte ai lavori della premiazione e fu sostituito da Ignazio Drago, allora direttore della rivista «Lo specchio del libro per ragazzi»<sup>45</sup>. Quanto ad Ada Marchesini Gobetti, i rapporti erano molto cordiali e già avviati da tempo con Flores d'Arcais che aveva avuto modo di lavorare con la Gobetti all'interno del Festival internazionale del Film per ragazzi di Venezia. Pare naturale dunque guardare a lei per il Premio del 1964 come figura esperta aggregata alla giuria ma senza diritto di voto, poiché l'allargamento alla partecipazione della componente internazionale ridimensionò la componente italiana alla sola figura del Presidente Flores d'Arcais<sup>46</sup>. L'intellettuale torinese aderì di buon grado offrendo ugualmente e in modo disinteressato i propri pareri di lettura, anche quando fu raggiunta da una lettera di A.M. Bernardinis che, tra l'imbarazzato e l'ironico, le fece presente una delle tante malefatte che «*Il gallo Sebastiano* si diverte a combinare»<sup>47</sup> ovvero che l'editore Einaudi a insaputa dell'autrice<sup>48</sup> aveva inviato proprio il suo graffiante racconto *Storia del gallo Sebastiano*<sup>49</sup> tra le opere concorrenti e ciò generava un evidente conflitto di ruolo.

Gli apporti italiani ai lavori del «Premio Città di Caorle» si espressero prevalentemente nel ruolo di «esperti aggregati alla Giuria», già presenti nell'edizione del 1962 ma con rilevanza crescente nelle edizioni successive, quando il numero delle opere concorrenti aumentò e andarono differenziandosi i paesi di provenienza. Rimasero stabili i nomi di A. M. Bernardinis e dell'amica

<sup>45</sup> La rivista fu attiva a Padova dal 1960 al 1981 e, come riferisce Donatella Lombello, A.M. Bernardinis avviò una collaborazione con il periodico dal 1970 al 1981 recensendo opere di letteratura giovanile. Cfr. Lombello, *La letteratura per l'infanzia a Padova: per una pedagogia della lettura e della letteratura giovanile*, cit., p. 315.

<sup>46</sup> A.M. Bernardinis riferisce di questo cambiamento in una lettera del 17 aprile 1964 indirizzata alla «Cara Signora Ada» dicendo: «Quest'anno la Giuria si comporrà di sette membri e il prof. d'Arcais ha voluto allargare al massimo la rappresentanza dei Paesi stranieri per cui soltanto lui stesso come Presidente rappresenterà l'Italia con diritto di voto. È un po' imbarazzante perciò chiederLe di fare parte di una Giuria soltanto come esperta e perciò senza diritto di voto, ma la sua opinione sarà espressa dal voto del prof. d'Arcais, il quale ha di Lei grandissima stima e pensa perciò di potere, con il Suo contributo, dare un giudizio veramente serio ed equanime, giudizio che esprimerà perciò il punto di vista italiano». APPPV, Cassetta Edizione 1964-1966, Faldone Critici, doc. 48/d, (2 ff. fronte).

<sup>47</sup> APPPV, Cassetta Edizione 1964-1966, Faldone Critici, doc. 46/a, (1 f. fronte) del 17 luglio 1964.

<sup>48</sup> Ciò è dichiarato da Ada Gobetti il 20 giugno 1964 a Flores d'Arcais. Cfr. APPPV, Cassetta Edizione 1964-1966, Faldone Critici, doc. 46/b, (1 f. fronte).

<sup>49</sup> Il testo, dopo essere stato pubblicato nel 1940 con lo pseudonimo di Margutte per ovvie ragioni politiche e grazie all'appoggio di Benedetto Croce presso Aldo Garzanti, fu ripubblicato da Einaudi nel 1963.

francese Jeanne Despinette<sup>50</sup> che lavorava al fianco di Eudes de la Potterie al BICE di Parigi. Invece tra il 1962 e il 1964 al posto di Maria Guaspari Bartolozzi del Centro Didattico Nazionale di Studi e di Documentazione di Firenze, che nel frattempo era chiamata a nuovi impegni con l'avvio proprio nel 1964 della Fiera del Libro di Bologna, fu introdotta Eugenia Martinez, delegata regionale dell'IBBY per il Lazio<sup>51</sup>, il cui apporto critico nel selezionare e coordinare i lavori della sezione italiana fu intenso e proseguì per tutta la durata del premio stesso. Dopo il rodaggio della prima edizione il processo valutativo del premio andò affinandosi. Gli esperti aggregati alla giuria non solo leggevano e valutavano personalmente i testi ma facevano da collettori di pareri di lettura richiesti ad altri esperti dei loro paesi. La documentazione rintracciata permette di affermare che il meccanismo divenne particolarmente articolato nell'edizione del 1968 quando furono costituite dieci «commissioni di lettura» facenti capo ciascuna a un membro della giuria e a sei esperti aggregati<sup>52</sup>. Gli esperti aggregati svolgevano un lavoro trasversale rispetto a più di una commissione valutando opere anche in altre lingue rispetto a quella del proprio paese. I tabulati sintetici relativi ai giudizi espressi mostrano che ogni volume veniva letto da circa la metà delle commissioni e che tutti i testi erano valutati dal gruppo italiano<sup>53</sup>. Padova manteneva dunque un ruolo di controllo consapevole e di regia dell'intero processo. Al tempo stesso svolgeva un lavoro sistematico di selezione delle opere avvalendosi della consulenza di un numero crescente di persone qualificate poiché Eugenia Martinez e Anna Maria Bernardinis coordinavano i pareri di Ada Gobetti e anche di Lina Sacchetti<sup>54</sup>

<sup>50</sup> Nelle lettere A.M. Bernardinis si rivolge a Jeanne Despinette dicendo «Ma très chère amie». Cfr. APPPV, Cassetta Edizione 1964-1966, Faldone Critici, doc. 34/b, (1 f. fronte) del 26 luglio 1964. Tale legame di affettuosa amicizia è confermato a distanza di anni nelle parole di J. Despinette tra gli articoli raccolti in onore della pedagoga patavina. J. E. J.M. Despinette, *Una testimonianza*, in Bohm (ed.), *Dire, leggere, ascoltare. Saggi in onore di Anna Maria Bernardinis*, cit., p. 13.

<sup>51</sup> L'attività critica della Martinez all'interno del Premio anticipa il lavoro recensorio sulla letteratura giovanile che dal 1967 e fino agli anni Novanta avrebbe svolto con finezza sul «Ragguaglio librario». A. Pastore, *Una rivista, una vita. «Il Ragguaglio librario» e Ines Scaramucci*, Milano, Vita & Pensiero, 2006, pp. 285-301; Id., *Cimmino Martinez Eugenia*, in Chiosso, Sani (edd.), *DBE: Dizionario biografico dell'educazione (1800-2000)*, cit., pp. 352-353.

<sup>52</sup> Oltre alle già citate Anna Maria Bernardinis, Jeanne Despinette ed Eugenia Martinez, figurano i nomi di Nicole Nicolas di Ginevra, Nansi [cy?] Pugh di Londra e Margh. Ch. Verot di Digione sulle quali non si possiedono ulteriori dati. APPPV, Cassetta Edizione 1962-1964, Faldone IV, 1968, doc. 7, (4 f. fronte).

<sup>53</sup> Il documento recante il titolo *Votazioni della giuria internazionale*, riporta per ciascuna opera la valutazione in decimi espressa dalle varie commissioni. Si osserva che alcune commissioni come Monaco, Parigi e Varsavia (oltre alla già citata Padova), fecero fronte a un lavoro molto intenso valutando opere italiane, francesi e tedesche. Invece altre commissioni come Londra, Copenaghen e Lubiana svolsero un lavoro decisamente più limitato e settoriale. APPPV, Cassetta Edizione 1962-1964, Faldone Schede di lettura IV Premio – Commissione di lettura di Padova (Dott.ssa Martinez), 1968, doc. 11, (12 f. fronte).

<sup>54</sup> Sulla produzione critica di Lina Sacchetti, con particolare riferimento alla manualistica, si

che entrò nel gruppo di lavoro dall'edizione del 1966 per i riconosciuti meriti come critico e come referente dell'Ente delle Biblioteche popolari e scolastiche<sup>55</sup>. Invece ricorsero alla consulenza di traduttori per conoscere almeno la trama di opere provenienti dai paesi dell'est e rimandarono alle commissioni di quell'area europea una valutazione critica più specifica<sup>56</sup>.

Il dinamismo per così dire «perfettibile» del Premio è ravvisabile nel dialogo continuo tra i giurati nel mettere a punto dispositivi processuali più efficaci. Fermo restando la cadenza biennale del premio, fissarono termini anticipati di chiusura per la partecipazione delle opere al concorso così da riservare tempi più distesi per la valutazione da parte della giuria<sup>57</sup>. Per favorire l'adesione del mondo editoriale, si presero accordi mirati sul numero di copie che le case editrici avrebbero dovuto inviare per partecipare alla selezione e si introdusse il criterio di circolazione dei volumi tra le varie commissioni<sup>58</sup>. Si adottarono strumenti per documentare le valutazioni espresse su ciascuna opera, si procedé con una preselezione e si giunse a identificare una rosa di testi più meritevoli<sup>59</sup>, si inserirono le menzioni speciali che consentirono di segnalare un maggior numero di opere qualitativamente valide. Nel 1968 si introdusse la sezione di Critica finalizzata a premiare il migliore saggio critico e/o di storia sulla letteratura per l'infanzia<sup>60</sup>. Tale approdo è indicativo degli sviluppi sostanziali

veda Lollo, *Sulla letteratura per l'infanzia*, cit., pp. 223-232.

<sup>55</sup> La documentazione d'archivio evidenzia che i contatti con Lina Sacchetti si infittirono dopo la sua partecipazione ai lavori della tavola rotonda del 1964. In una lettera del febbraio 1965 A.M. Bernardinis sollecita un incontro «chiarificatore» con Lina Sacchetti contando su un suo eventuale aiuto nel contattare nuovi referenti tramite il circuito delle biblioteche popolari e scolastiche anche in area slava. Cfr. APPPV, Cassetta Edizione 1964-1966, Faldone Critici, doc. 18/b, (1f. fronte).

<sup>56</sup> Nel materiale archivistico consultato sono menzionate le traduzioni in riassunto dal russo, dal cecoslovacco e dal polacco commissionate e inviate ai membri della giuria. Cfr. APPPV, Cassetta Edizione 1964-1966, Faldone Corrispondenza Comune Caorle, doc. 17, (1 f. fronte) del 20 luglio 1964.

<sup>57</sup> Il consiglio di anticipare i termini di consegna fu espresso da Jack Morpurgo in previsione dell'edizione del 1968, probabilmente anche a seguito della flessione di partecipanti riscontrati nell'edizione del 1966. Cfr. APPPV, Cassetta Edizione 1964-1966, Faldone 1968 Lettere, doc. 4, (2 f. fronte) del 5 giugno 1967.

<sup>58</sup> *Ibid.*

<sup>59</sup> Le proposte furono espresse sia da Jack Morpurgo sia da Eudes de la Potterie (APPVV, Cassetta Edizione 1964-1966, Faldone 1968 Lettere, doc. 9, (4 f. fronte) del 31 luglio 1968 e n.10 del 26 marzo 1968 (3f. fronte).

<sup>60</sup> L'opuscolo informativo del IV «Premio Città di Caorle» prevedeva l'istituzione del «Premio per un saggio di critica» al fine di incoraggiare gli studi storici e critici sulla letteratura per l'infanzia in Italia e per promuoverne la conoscenza a livello europeo. APPPV, Cassetta Edizione 1962-1964, Faldone 4/1968, doc. 1 (2 f. fronte). Il Premio della Critica fu assegnato a A. Hölder, *Das abenteuerbuch im Spiegel des männlichen reifezeit* per originalità della ricerca scientifica «rigorosa nella elaborazione statistica [...] e nella determinazione dei generi differenti». Una menzione venne riservata ai manuali di nuova elaborazione di: A. Cibaldi, *Storia della letteratura per l'infanzia e l'adolescenza*, Brescia, La Scuola, 1967; A. Lugli, *Storia della letteratura per la gioventù*, Firenze, Sansoni, 1966; L. Sacchetti, *Storia della letteratura per ragazzi*, Firenze, Le Monnier, 1962. Mentre sul piano internazionale è nominato A. Gütter, *Märchen und Märe*, Antonius-Verlag, Solothurn,

maturati in seno all'iniziativa, poiché il lavoro di analisi delle opere aveva nel frattempo portato alla luce il bisogno di coltivare la centralità di un fondato statuto critico-interpretativo disciplinare. La sezione di Critica prevedeva un'apposita commissione che partì sotto i migliori auspici grazie all'impegno di insigni pedagogisti delle università italiane. Accanto a Flores d'Arcais e ad A.M. Bernardinis, diventata nel frattempo Libera Docente, si trovano i nomi di Raffaele Laporta, di Giovanni Maria Bertin e di Giorgio Petrocchi. Nei loro interessi educativi c'era uno spazio di rilievo per la letteratura per l'infanzia e di lì a qualche anno si sarebbero visti gli sviluppi decisivi nell'ateneo bolognese dove Antonio Faeti, allievo di Bertin<sup>61</sup>, avrebbe dato avvio a una tutt'ora significativa scuola di pensiero sulla Letteratura per l'infanzia.

### 3. *Quale letteratura giovanile partecipa?*

Uno sguardo quantitativo attorno alle opere presentate nelle varie edizioni del premio consente di tracciare una mappa complessiva delle quattro edizioni. Dopo una partenza piuttosto in sordina nel 1962 con una non ben quantificata produzione italiana e francese, si affermò nell'edizione del 1964 con 110 opere concorrenti e dopo una flessione nel 1966 con 89 testi, visse un sensibile incremento nel 1968 con 138 testi.

I verbali della giuria del 1962 non fecero mistero dei limiti temporali entro i quali i commissari operarono e a ciò pare riconducibile l'esiguità delle opere presentate e la provenienza italo-francese dei titoli. Immediatamente i giurati stabilirono che la partecipazione non potesse essere circoscritta ai paesi aderenti al MEC ma a «tutti i paesi dell'Europa» in modo che l'opera premiata potesse davvero «contribuire a dare ai fanciulli la consapevolezza della partecipazione a una comune civiltà europea per una migliore comprensione dei valori propri dei singoli popoli»<sup>62</sup>. Tali linee progettuali e un'organizzazione puntuale dell'intero processo concorsuale favorirono una più ampia adesione delle case editrici all'iniziativa assicurando ad essa visibilità internazionale già dall'edizione del 1964. Fondamentali furono senz'altro la tavola rotonda tenutasi a Firenze a Palazzo Gerini nel gennaio del 1963, che proseguì il dibattito avviatosi a Caorle<sup>63</sup>, e la conferenza stampa tenutasi a Parigi nel dicembre 1963 al Circolo

1968. Cfr. [s.a.], *I Premio della critica per la letteratura giovanile*, «Rassegna di Pedagogia», vol. 24, n. 1, 1969, p. 158-159.

<sup>61</sup> Lollo, *Sulla letteratura per l'infanzia*, cit., pp. 246-248.

<sup>62</sup> APPPV, Cassetta Edizione 1962-1964, Faldone 1/1962, doc. 3 (2 f. fronte).

<sup>63</sup> In una lettera del 19 febbraio 1963 di Flores d'Arcais a Nicolò Degani, Commissario responsabile dell'Azienda di Soggiorno e turismo di Caorle, fece menzione alle sinergie adottate in un confronto costruttivo tra mondo scientifico e mondo editoriale presso il Centro Didattico Nazionale di studi e di Documentazione di Firenze. APPPV, Cassetta Edizione 1964-1966,

della Libreria durante la quale furono presentate le linee programmatiche europeistiche per una letteratura capace di promuovere nella poesia e nell'arte maggiore conoscenza e stima verso le differenze culturali e di mentalità dei vari popoli europei. La letteratura non avrebbe educato all'Europa se avesse mosso verso un modo simile o uguale «di pensare, di sentire, di reagire, di ottenere i medesimi ideali», ma se, nella valorizzazione delle differenze, si fossero potuti cogliere aspetti comuni. Di conseguenza si chiarì che

Il Premio Europeo «Città di Caorle» vuole premiare quello scrittore in cui il valore d'artista sia pari a quello di educatore e che sappia trasmettere i significati della nostra civiltà in linguaggio e temi adatti ai ragazzi dei nostri paesi<sup>64</sup>.

La linea programmatica, resa disponibile al mondo editoriale presente all'evento, contribuì ad accrescere la quantità di opere presentate all'edizione del 1964 e soprattutto ad assicurare la rappresentatività di vari paesi. Se un terzo del totale furono di provenienza italiana, accanto a un quarto di area francofona tra Francia e Belgio, risultò altrettanto ben rappresentata l'area tedesca comprendente Germania, Austria, Svizzera e Cecoslovacchia e manifestò una buona presenza la produzione inglese<sup>65</sup>. L'edizione del 1966 andò incontro a un lieve calo quantitativo ma in compenso evidenziò un ampliamento dei paesi coinvolti, poiché entrarono a far parte testi provenienti anche dalla Grecia, dall'Olanda e soprattutto dalla Spagna<sup>66</sup> che, nella edizione successiva del Premio e nei cambiamenti che sarebbero stati introdotti dagli anni Settanta, divenne paese rappresentato anche nell'ambito della giuria grazie alla studiosa spagnola Carmen Bravo Villasante<sup>67</sup>. Nell'edizione del 1968, oltre alla maggior

Faldone Corrispondenza Comune Caorle, doc.13 (2 f. fronte). Le problematiche e le decisioni assunte all'interno del Convegno fiorentino del 26 e 27 gennaio furono riportate in *Convegno degli editori italiani di Letteratura per l'infanzia*, «Rassegna di Pedagogia», vol. 18, nn. 1-2, 1963, pp. 112-117.

<sup>64</sup> APPPV, Casseta Edizione 1962-1964, Faldone 2/1964, doc. 11 (4 f. fronte).

<sup>65</sup> APPPV, Casseta Edizione 1962-1964, Faldone 2/1964, doc. 2 (6 f. fronte). Il documento recante il titolo *Elenco dei libri inviati in esame alla giuria del II Premio europeo Città di Caorle* – Lista n. 3, comprende l'elenco completo delle opere concorrenti. Da una disamina quantitativa risulta che sul totale di 110 opere, 44 erano italiane (39 volumi e 5 manoscritti inediti); 21 francesi e 2 belghe (23 di area francofona); 18 tedesche, 6 austriache, 2 svizzere e 3 cecoslovacche (29 di area tedesca); 11 inglesi e 1 della Nuova Zelanda forse perché faceva parte del Commonwealth.

<sup>66</sup> APPPV, Casseta Edizione 1962-1964, Faldone 3/1966, doc. 4 (7 f. fronte). Il documento recante il titolo *Elenco dei libri inviati in esame alla giuria del III Premio europeo Città di Caorle* comprende l'elenco di tutte le opere concorrenti. L'analisi quantitativa consente di evidenziare che sul totale di 89 opere presentate 43 erano italiane (24 edite e 18 inedite); 19 francesi (17 edite e 2 inedite); 10 tedesche, 1 svizzera, 1 austriaca, 3 cecoslovacche (1 edita e 2 inedite) 1 olandese (16 di area tedesca); 4 inglesi; 4 spagnole.

<sup>67</sup> Il suo nome figura già in un documento del 1964 con il proposito di inserirla nella giuria, ma il progetto non andò evidentemente subito in porto. Cfr. APPPV, Casseta Edizione 1962-1964, Faldone 2/1964, doc. 3 (7f. fronte). La Bravo Villasante nel 1964 ebbe un ruolo di rilievo nell'Ibby poiché contribuì a sviluppare le sezioni in Sud America. Come già detto per altri studiosi, le osmosi tra Ibby e «Premio Caorle» furono plurime e fruttuose dal punto di vista dell'apporto

rappresentatività della Spagna, si segnala un cospicuo gruppo di testi provenienti dall'est europeo che può essere letto come diretta conseguenza dell'ampliamento della giuria con membri provenienti da quest'area geografica<sup>68</sup>.

Sotto il profilo qualitativo non si può prescindere dall'osservare che il taglio specifico del Premio generò già a monte una naturale selezione. Quindi le opere presentate non furano certamente lo specchio dell'intera produzione letteraria di ciascun paese bensì una parte rispondente alle finalità di educazione europea previste dal concorso. Questo vincolo non marginale fu segnalato dalla Giuria della prima edizione del 1962. Infatti nel verbale si dice che «la giuria ha dovuto constatare che le opere selezionate, pur presentando un elevato livello di arte e di civiltà, non rispondevano completamente alle finalità del Premio»<sup>69</sup>. Un altro aspetto di esclusione riguardò opere presentate in traduzione e non in lingua originale. In tal caso l'aderenza contenutistica da sola non era garanzia di qualità letteraria, peraltro non sempre apprezzabile in un testo tradotto e dunque reinterpretato. Nel 1962 fu questa la sorte dell'opera *Le voyage de Dag* della norvegese Inger Austveg, ma presentata nell'edizione francese, che ottenne solo una menzione<sup>70</sup>, invece il premio fu attribuito *ex aequo* al francese Père Castor (pseudonimo di Paul Faucher) e all'italiano Aldo Alberti. Mentre Père Castor era autore noto per la qualità letteraria e artistica dei propri albi illustrati per ragazzi ed educatore impegnato nell'ambito dell'attivismo presso l'Istituto Jean Jacques Rousseau di Ginevra<sup>71</sup>, di Aldo Alberti non si sa molto e la sua incursione nella letteratura giovanile pare legata solo a *Storie meravigliose degli animali in Paradiso* premiata insieme alla collezione di Père Castor «Fanciulli della terra»<sup>72</sup>. La menzione riconosciuta alle *Favole al telefono* di Gianni Rodari

culturale. Cfr. Bamberger, *Survey of the history of the International board on books for young people*, in Bamberger, Binder, Hurlimann, *20 years of the international board on books for young people*, cit., p. 35.

<sup>68</sup> APPPV, Cassetta Edizione 1962-1964, Faldone 4/1968, doc. 5 (6f. fronte). Il documento recante il titolo «Elenco dei libri partecipanti» comprende l'elenco di tutte le opere concorrenti già diviso per nazione. L'analisi quantitativa consente di evidenziare che sul totale di 138 opere presentate 48 erano italiane, 23 francesi, 8 belghe, (31 di area francofona); 14 tedesche, 1 austriaca, 6 cecoslovacche, 4 svizzere (25 di area tedesca); 11 inglesi; 6 jugoslave, 6 polacche, 1 rumena, 1 sovietica (13 di area dell'est europeo); 1 greca; 9 spagnole.

<sup>69</sup> APPPV, Cassetta Edizione 1962-1964, Faldone 1/1962, doc. 3 (2f. fronte).

<sup>70</sup> Nei verbali infatti si motivò con queste parole l'impossibilità di premiare l'opera: «[La Giuria] ha tuttavia ritenuto meritevole di particolare considerazione l'opera *Le voyage de Dag* di Austveg, che sarebbe stata la più rispondente ai requisiti richiesti per le sue qualità letterarie e per la sua aderenza allo spirito del Premio, ma che non ha potuto essere premiata essendo una traduzione francese d'un originale norvegese». *Ibid.*

<sup>71</sup> J. Branchu (ed.), *Paul Faucher (1898-1967): le Père Castor, un Nivernais inventeur de l'album moderne. Actes du colloque de Pougues-les-Eaux, 20-21 nov. 1998, organizzato dal Conseil général de la Nièvre, Association des amis du Père Castor, Varennes, Conseil général de la Nièvre, 1999.*

<sup>72</sup> L'assegnazione del Premio del 1962 alle due opere fu così motivato dalla giuria: «1) a Père Castor (Paul Faucher) per la Collezione «Fanciulli della terra», ed. Flammarion, Paris, perché rivolgendosi a fanciulli di 6-7 anni, presenta loro la vita di coetanei d'altri Paesi, situandosi nel

«per il poetico umorismo da cui emergono valori fondamentali della civiltà europea»<sup>73</sup> fa riflettere. Certamente le *Favole al telefono*, pubblicate nel 1962, permisero a Rodari di affermarsi nell'ambito della letteratura per l'infanzia del nostro paese<sup>74</sup>, nonostante la sua produzione per ragazzi fosse iniziata almeno un decennio prima. Ai giurati del «Premio Caorle» non sfuggì la finezza letteraria dello scrittore di Omegna, ma non fu sufficiente per decretarne la premiazione. Anche nelle edizioni successive Rodari avrebbe partecipato con altri testi<sup>75</sup> ma non riuscì a convincere pienamente i commissari alla ricerca di più marcati riferimenti all'educazione in chiave europea. Il riconoscimento pieno a livello internazionale sarebbe giunto per Rodari solo otto anni più tardi, quando nel 1970 ottenne dall'IBBY il prestigioso «Premio Andersen».

Nell'edizione del 1964 il premio venne assegnato *ex aequo* all'opera dei coniugi inglesi Jona e Peter Opie *The Puffin book of nursery rhymes* edito da Puffin nel 1963 e a *Mister Master* di Donatella Ziliotto edito da Vallecchi nel 1962. Il premio, conferito alla raccolta di filastrocche inglesi, riconobbe il valore estetico e musicale della parola delle nursery rhymes nella formazione letteraria dell'infanzia, bisognosa di recuperare la dimensione archetipica del linguaggio. L'attività letteraria di Jona e Peter Opie aveva mostrato già da tempo questa dedizione per il recupero scientifico di poesie della tradizione<sup>76</sup> e il «Premio Caorle» si qualificò come una sorta di coronamento del loro operato. Di *Mister Master* della triestina Donatella Ziliotto, la giuria seppe apprezzare il respiro internazionale dell'intreccio e l'intensità narrativa della giovane autrice capace

loro ambiente con felice realismo. Con questa scelta si intende premiare tutta l'opera per l'infanzia ispirata e diretta da Mr. Paul Faucher; 2) a Aldo Alberti per il libro «storie meravigliose degli animali in Paradiso», ed. Tumminelli, Roma, che nelle sue storie quasi vere di animali contiene elementi comuni della psicologia dei fanciulli d'ogni paese». *Ibid.*

<sup>73</sup> *Ibid.*

<sup>74</sup> G. Rodari, *Favole al telefono*, Torino, Einaudi, 1962. Per un inquadramento su Rodari si rinvia a P. Boero, *Una storia, tante storie*, Trieste, Einaudi Ragazzi, 2010.

<sup>75</sup> Nell'edizione del 1964 partecipò con *Castello di carte*, Milano, Mursia, 1963 e con *Gip nel televisore*, Milano, Mursia, 1962. È interessante notare che le valutazioni della giuria non furono influenzate da quanto nel frattempo era avvenuto nell'ambito dell'IBBY poiché già nell'aprile di quell'anno Rodari era entrato a far parte della lista d'onore del premio con *Gip nel televisore* anche se nell'ambito del Congresso di Madrid *Literature for children since the 2<sup>nd</sup> World War – Ninth Congress* del 14 ottobre non ottenne alcuna menzione. Il nome di Rodari sarebbe entrato nella lista degli aspiranti vincitori del Premio Andersen nel 1966 e nel 1968 quando perse allo scrutinio finale, mentre vinse nel 1970 a Bologna durante il Congresso *Literature for young people in a changing world* insieme all'illustratore Maurice Sendak. Cfr. Bamberger, *Survey of the history of the International board on books for young people*, in Bamberger, Binder, Hurlimann, *20 years of the international board on books for young people*, cit., pp. 35-49. Al «Premio Caorle» Rodari partecipò nel 1968 con *Modra Puscica*, Lubiana, Mladinska Knjiga, 1967 ovvero con la traduzione di *La freccia azzurra*, Milano, Mursia, 1964 ma, come visto in altri casi, le traduzioni non erano oggetto di selezione da parte della giuria. APPPV, Cassetta Edizione 1962-1964, Faldone 4/1968, doc. 5 (6 f. fronte).

<sup>76</sup> Il recupero folklorico era visibile in J.P. Opie, *The Oxford dictionary of nursery rhymes*, Oxford, Clarendon Press, 1951; Id., *The Oxford nursery rhyme book*, Oxford, Oxford University Press, 1955; Id., *The lore and language of schoolchildren*, London, Oxford University Press, 1959.

di controllare con finezza la qualità della propria scrittura. La Ziliotto aveva già manifestato la propria conoscenza internazionale della letteratura per l'infanzia dando vita alla fortunata collana del «Martin pescatore» presso Vallecchi. In essa nel 1958 aveva tradotto e fatto conoscere ai lettori italiani *Pippi calzelunghe* di Astrid Lindgren e nel 1959 *La tela di Carlotta* di Elwyn Brooks White, oltre ad autrici come Tove Jansson che nel 1966 sarebbe stata insignita del Premio Andersen. La premiazione colse di sorpresa Donatella Ziliotto. Partecipò alla tavola rotonda ma era all'oscuro che Vallecchi avesse presentato il suo racconto al concorso<sup>77</sup> e il sapore della gradita sorpresa insieme all'affezione biografica per l'opera risuona nella lettera inviata a Giuseppe Flores d'Arcais al termine dell'evento di Caorle:

Gentile Professore,  
 volevo ringraziarLa un po' meglio che a voce del regalo che mi ha fatto a Caorle. Per quanto Lei non mi volesse credere, sono incapace di esprimere verbalmente forti emozioni e intensa gratitudine, e mi scuso con Lei per non essere stata una premiata rappresentativa e di effetto. In realtà, nonostante sia passato qualche tempo da quando lo scrissi, sono molto affezionata al «Mister Master», c'è lì dentro molta della mia infanzia e una grande nostalgia (ero in Svezia, mentre lo scrivevo, e con la morte di mio padre un ciclo della mia vita s'era chiuso). Per aver sottolineato inconsciamente tutto questo, io la ringrazio ancora. Anche il Professor Pampaloni è rimasto molto soddisfatto. Il libro avrà presto una fascetta e la Vallecchi curerà anche un particolare trafiletto a riguardo sulla stampa.

Con i migliori saluti Donatella Ziliotto<sup>78</sup>

La giuria mostrò di muoversi ancora una volta con libertà e lungo itinerari non battuti o scontati nel panorama letterario italiano del tempo. Preferì promuovere penne nuove, proiettate al futuro come la Ziliotto piuttosto di autori affermati come Giana Anguissola, Italo Calvino e Gianni Rodari, i quali vennero senz'altro ritenuti degni di considerazione<sup>79</sup>, ma sui loro nomi i commissari non riuscirono a convergere nell'attribuire il premio o la menzione d'onore.

<sup>77</sup> L'informazione fu riferita dall'autrice in un intervento nel corso della tavola rotonda. Cfr. D. Ziliotto, *Interventi. La storia nel romanzo europeo per ragazzi. Atti della II tavola rotonda. Caorle 11-13 settembre 1964*, «Rassegna di Pedagogia», vol. 20, numero speciale, 1965, p. 73.

<sup>78</sup> APPPV, Cassetta Edizione 1964-1966, Faldone Scrittori, doc. 8 (1f. fronte). Sul volume *Mister Master* A.M. Bernardinis espresse parole di vero plauso in una recensione del 1965 nella quale sosteneva che raramente è dato trovare un'opera dove «contenuto, stile e spirito» convergano in un'unità armoniosa pervasa di elementi fiabeschi e di un fine umorismo grazie ai quali i ragazzi italiani «impareranno a sorridere con benevolenza dei difetti altrui e propri e in questo sorriso, in questo spirito, saranno accomunati ai ragazzi di tutta Europa». Cfr. A.M. Bernardinis, recensione a D. Ziliotto, *Mister Master*, «Rassegna di Pedagogia», vol. 20, n.1, 1965, pp. 139-140.

<sup>79</sup> Gli autori citati furono indicati «nel gruppo di opere sulle quali [la giuria ha] fermat[o] la propria considerazione». Cfr. APPPV, Cassetta Edizione 1962-1964, Faldone 2/1964, doc. 1 (3 f. fronte). 2° Premio europeo «Città di Caorle», «Rassegna di Pedagogia», vol. 20, numero speciale, 1965, p. 125. Invece non sono segnalati: *Storia del gallo Sebastiano* di Ada Gobetti, *L'Italia nei secoli* di M. Milani, *Il mistero del Mulino* di O. Visentini e *il libro della natura* di M. Maltoni. APPPV, Cassetta Edizione 1962-1964, Faldone 2/1964, doc. 2 (6 f. fronte).



Di profilo decisamente diverso si presentò il panorama delle opere concorrenti nel 1966 alla terza edizione del «Premio Caorle». Nell'ambito della produzione italiana, accanto a opere della già nominata Giana Anguissola, nel frattempo scomparsa, si trovano autrici dagli stili paludati come Pina Ballario o Ines Lagazzi Belski o autori di opere più orientate al settore scolastico come quelle di Giovanni Cristini, Vezio Melegari ed Emilio Radius<sup>80</sup>. Anche il testo inedito di Lino Landolfi *Procopio di Torrecupa* non fu selezionato dalla giuria forse perché il personaggio era noto al pubblico del «Vittorioso» e godeva di una leggibilità situata nel contesto italiano<sup>81</sup>. La traduzione in tedesco di *Guizzino* di Leo Lionni, che nell'edizione originale inglese aveva ricevuto la menzione del Caldecott Medal nel 1964<sup>82</sup>, non vinse. Pare di poter capire che ciò non dipese dall'indiscussa qualità estetico-letteraria dell'opera, quanto semmai dalla tipologia. Valeva anche per *Guizzino* quanto sarebbe stato detto da Eugenia Martinez nell'edizione successiva per *Federico* di Leo Lionni: «non corrisponde ai criteri del Premio, trattandosi di un albo per i più piccini»<sup>83</sup>. Fu invece premiato il francese Léonce Bourliaguet con *Les canons de Valmy* del 1965<sup>84</sup>. Si trattava dell'ultima opera scritta dall'autore prima di morire nel 1965 e il premio suona un po' come una sorta di tributo a quello «scrittore ed educatore» che tanto si era adoperato per l'infanzia e i valori estetici ed etico-educativi della sua opera ben rispondevano ai criteri del premio. Senza dubbio il premio raggiunse uno dei propri scopi: favorire la circolazione della letteratura per l'infanzia da un paese all'altro dell'Europa. Nel 1968 l'opera fu tradotta in inglese e anche in italiano<sup>85</sup>. La sua diffusione nel nostro paese arriva vicino ai giorni nostri con una nuova edizione di Einaudi Scuola del 1995.

Nel 1968 dai verbali del Premio si coglie invece un procedere valutativo più difficoltoso da parte della giuria che si trovò di fronte a «un numero elevato di titoli» dei quali molti ritenuti «di ottimo livello»<sup>86</sup>. L'ampia articolazione delle commissioni di lettura, da un lato consentì un lavoro di selezione accurato, ma dall'altro lato lascia emergere il non scontato approdo a valutazioni difformi

<sup>80</sup> Si tratta rispettivamente dei seguenti testi: G. Anguissola, *Il signor Serafino*, Milano, La Sorgente, 1965; Id., *La vetrina dell'orefice*, Milano, Mursia, 1965; P. Ballario, *Una ragazza salverà la Francia*, Milano, Mursia, 1965; I. Lagazzi Belski, *Il mobiletto misterioso*, Napoli, Ed. Vera Vita, 1965; G. Cristini, *I grandi poemi dell'umanità*, Milano, Rizzoli, 1964; V. Melegari, *Missilino Fiordimarte*, Milano, Rizzoli, 1965; E. Radius, *Vita di Dante*, Milano, Mursia, 1965. APPPV, Cassetta Edizione 1962-1964, Faldone 3/1966, doc. 4 (5f. fronte).

<sup>81</sup> Cfr. G. Vecchio, *L'Italia del Vittorioso*, Roma, Ave, 2011, pp. 41 ss.

<sup>82</sup> E. O'Sullivan, *Historical dictionary of children's literature*, Lanham, Scarecrow Press, 2010, pp. 276 ss; <<http://www.ala.org/alsc/awardsgrants/bookmedia/caldecottmedal/>> (ultimo accesso: 20 Agosto, 2016).

<sup>83</sup> APPPV, Cassetta Edizione 1962-1964, Faldone Schede di lettura, IV Premio Caorle, doc. 10 (1 f. fronte).

<sup>84</sup> L. Bourliaguet, *Les canons de Valmy*, Parigi, Societé Nouvelle des Editions, 1965.

<sup>85</sup> Id., *Valmy cannons*, trad. J. Buchanan Brown, London, 1968; Id., *I cannoni di Valmy*, Milano, Il Saggiatore, 1968, e Einaudi Scuola, 1995.

<sup>86</sup> APPPV, Cassetta Edizione 1962-1964, Faldone 4/1968, doc. 4 (6 f. fronte).

per competenze diverse e per valenze non omologhe nell'espressione di giudizi sintetici. Così avvenne per il premiato *Carla degli scavi* di Renée Reggiani<sup>87</sup> sul quale le schede di lettura mostrano divergenze valutative sia tra paesi sia all'interno della stessa commissione italiana. A fronte di valutazioni piene del gruppo tedesco e molto buone del gruppo francese, la valutazione del gruppo italiano apparve divisa. Eugenia Martinez segnalò la mancanza di senso storico nell'opera e scelte stilistiche ripetitive, mentre Anna Maria Bernardinis ritenne «ottimo lo stile, nuovo e originale» per l'uso naturale del flashback e per la potenzialità del testo di veicolare i valori della civiltà europea «agli altri popoli, non per imporli ma per ritrovarsi tutti più uniti e più solidali». Decisiva fu la posizione entusiasta e senza riserve di Flores d'Arcais che lo valutò ottimo<sup>88</sup>.

I valori della libertà, della mutua comprensione tra popoli, basi per un futuro migliore della condizione umana, accomunarono i giudizi dei secondi premi ex aequo, attribuiti al racconto cecoslovacco *Divoky konic Ryn* (*Ryn, cavallo selvaggio*) di B. Riha e al testo inglese *Midnite* di R. Stow, e la menzione speciale riconosciuta al polacco *W Nieparvuzu i Gdzie Indziei* di A. Kamienska<sup>89</sup>.

L'edizione del 1968 insieme all'ampliamento delle opere concorrenti e alle potenzialità innegabili del Premio, lasciò emergere il bisogno per il futuro di effettuare un salto qualitativo sotto il profilo dell'organizzazione processuale. Il gravoso lavoro di gestione e di controllo svolto dalla sede di Padova non era riuscito ad alleggerire a sufficienza le commissioni dei singoli paesi e, come disse Eudes de la Potterie in una lettera ad A.M. Bernardinis, affettuosamente chiamata «Mademoiselle la secrétaire générale», la Francia avrebbe avuto bisogno non semplicemente di un piccolo gruppo di lavoro ma di una segreteria apposita che il BICE non avrebbe potuto sostenere economicamente.

Inoltre, l'allargamento della portata del premio e le sue sinergie con studiosi impegnati nell'IBBY chiedevano di riflettere su come proseguire a caratterizzare sempre meglio l'iniziativa in chiave europea<sup>90</sup>. La documentazione finora rintracciata non consente di approfondire meglio i motivi per i quali il Premio non si tenne più a Caorle. Certo non fu una decisione preordinata. Nel 1968

<sup>87</sup> R. Reggiani, *Carla degli scavi*, Milano, Garzanti, 1968.

<sup>88</sup> APPPV, Cassetta Edizione 1962-1964, Faldone Schede di lettura, IV Premio Caorle, Commissione lettura Padova (Dott.ssa Martinez) doc. 9, doc. 1, doc. 4, (1 f. fronte).

<sup>89</sup> APPPV, Cassetta Edizione 1962-1964, Faldone 4/1968, doc. 4 (6 f. fronte).

<sup>90</sup> APPPV, Cassetta Edizione 1962-1964, Faldone 4/1968, doc. 10 (3 f. fronte). Nella lettera del 26 marzo 1968 Eudes de la Potterie scrisse a questo proposito: «Il faudra discuter de ces nouvelles méthodes de travail à Caorle. La mise en place de tout un système administratif (réception des ouvrages, correspondance avec les éditeurs, fiches à remplir) alourdit considérablement notre travail et nécessiterait Presque l'appui non seulement d'une petite équipe (que pour ma part j'essaie de constituer) mais également d'un secrétariat que nous ne pouvons pas assurer nous-mêmes. Il serait presque nécessaire de mettre en place des comités plus officiels dans chaque pays pour cerner cette question mais vous risqué peut-être de faire concurrence avec d'autres initiatives internationales telle que le Prix Andersen».

a conclusione dell'iniziativa si diede appuntamento al settembre 1970<sup>91</sup> ma sappiamo che ciò non si verificò e che il Premio avrebbe avuto una pausa di cinque anni prima di essere riproposto con la denominazione «Premio Trento» avviando una nuova fase di sviluppo.

#### 4. *I lavori delle tavole rotonde*

Le tavole rotonde furono spazio di dialogo non estemporaneo. Nel loro insieme intesero tratteggiare uno sviluppo del dibattito culturale sulla letteratura per l'infanzia secondo un disegno unitario e in divenire che intendeva guardare all'educazione europea fondata sull'unità spirituale e all'educazione alla lettura giovanile come «dialogo tra pensieri e attività continuamente interpretatrice[sic] e ricreatrice [sic]»<sup>92</sup>. La dimensione dialettica, posta a fondamento della tensione problematica degli argomenti trattati, divenne anche cifra distintiva metodologico- processuale che investì l'organizzazione degli appuntamenti di Caorle. La modalità della tavola rotonda, nella quale erano previste relazioni accademiche introduttive al tema e interventi proposti da critici letterari e autori appositamente invitati, consentì una trattazione pluriprospectiva delle questioni sollevate sia per varietà di competenze sia per il procedere del discorso non totalmente preordinato ma aperto all'apporto *in fieri* proveniente da ciascun presente. Lo spazio chiarificatore nella ripresa conclusiva da parte dei relatori permise di giungere a riflessioni condivise accanto a specificità peculiari che si potessero tradurre in obiettivi di sviluppo teorico- scientifico e in linee di intervento a livello editoriale e autoriale.

I lavori della tavola rotonda del 1962 dal titolo *Il contributo della letteratura per l'infanzia alla Comunità europea* diedero al contempo le basi pedagogiche e letterarie. Sotto il profilo pedagogico si mirava alla riscoperta di un «autentico umanesimo» fondato, secondo Flores d'Arcais, attorno alle più ampie accezioni del *logos*, compresa dunque l'arte, quale espressione dell'umano nel proprio procedere storico<sup>93</sup>. Sotto il profilo letterario A.M. Bernardinis guardava di conseguenza alla letteratura europea con caratteristiche di unitarietà, se fondata attorno a valori comuni, a un linguaggio che si potesse dire autenticamente poetico e in tal senso attento a far scaturire una visione sempre più profonda e umanizzante della realtà<sup>94</sup>. Tali concetti tracciavano

<sup>91</sup> L'appuntamento a settembre 1970 fu comunicato a margine dell'edizione del 1968 in relazione al proposito di proseguire l'iniziativa con il «II premio della critica». Cfr. *II Premio della Critica*, «Rassegna di Pedagogia», vol. 24, n. 1, 1969, p. 160.

<sup>92</sup> Cfr. *Conclusioni finali della I tavola rotonda riunitasi a Caorle il 27-28 settembre 1962*, cit., p. 109.

<sup>93</sup> G. Flores d'Arcais, *Prospettive per una pedagogia europea*, cit.

<sup>94</sup> A.M. Bernardinis, *Le letteratura per i fanciulli e la comunità europea*, «Rassegna di

una strada ancora tutta da percorrere e lungo essa non mancavano ostacoli e questioni aperte. In controtelaio erano costantemente richiamati i valori di ricerca del vero e del bene. Ma in concreto come fare a realizzare una «comunanza spirituale e di fraterna intimità dei diversi che conservano il loro gusto e la loro capacità creatrice»<sup>95</sup> quando il passato recente aveva dilaniato l'Europa e non doveva essere dimenticato? Che cosa significava pensare e ripensare a una letteratura rispettosa di verità storica e di bene dei quali avevano bisogno le nuove generazioni? Fu da subito chiaro che ciò non avrebbe potuto essere rintracciato entro un'idea di unità sterile e omologante, uniforme e incolore e in definitiva storicamente infeconda, quanto semmai nella trasversalità di valori ricreati e reinterpretati ogni volta nell'originalità artistica dell'opera e nella possibilità di essere conosciuti dai bambini di vari paesi grazie alle traduzioni «con assoluto rispetto del testo, con gusto letterario e con competenza linguistica»<sup>96</sup>. Si chiedeva dunque fedeltà al bambino, al testo letterario e alla storia. Una riflessione di ampio profilo su questi temi fu affrontata nel corso della II tavola rotonda che si tenne a Caorle nel corso del Premio del 1964. Il titolo *La storia nel romanzo europeo per ragazzi* era piuttosto impegnativo poiché si allontanava da una trattazione storico-letteraria per generi, come poteva tradizionalmente trovarsi in tanta produzione manualistica. Al contrario obbligava a scavare secondo una prospettiva problematica sul modo di trattare la storia nelle opere letterarie e a recuperarne una centralità spesso depauperata o mitizzata. Nella relazione affidata a Richard Bamberger lo studioso avvertiva il mancato equilibrio nella valutazione delle due guerre mondiali. Secondo Bamberger i conflitti bellici del Novecento erano trattati con «abuso patriottico» e mettendo «in falsa luce altri paesi»<sup>97</sup> e ciò avveniva anche perché gli scrittori non possedevano una conoscenza obiettiva della storia e la mancanza di consapevolezza li rendeva «strumento di idee di propaganda»<sup>98</sup>. Invece Marc Soriano, invitato espressamente da A. M. Bernardinis<sup>99</sup>, rilevava

Pedagogia», vol. 18, nn. 1-2, 1963, pp. 32-36. Può essere interessante notare che il contributo era stato presentato alla tavola rotonda con il titolo *La letteratura per i fanciulli a servizio della Comunità europea* attribuendo in tal caso alla letteratura per l'infanzia una sfumatura più strumentale rispetto alla costruzione dell'identità europea. Cfr. APPPV, Cassetta Edizione 1962-1964, Faldone I/ 1962, doc. 4, (4f. fronte).

<sup>95</sup> Cfr. *Conclusioni finali della I tavola rotonda riunitasi a Caorle il 27-28 settembre 1962*, cit., p. 110.

<sup>96</sup> Cfr. *Conclusioni finali della I tavola rotonda riunitasi a Caorle il 27-28 settembre 1962*, cit., p. 110.

<sup>97</sup> R. Bamberger, *La storia nella letteratura per la gioventù. La storia nel romanzo europeo per ragazzi. Atti della II tavola rotonda. Caorle 11-13 settembre 1964*, «Rassegna di Pedagogia», vol. 20, numero speciale, 1965, pp. 15, 19.

<sup>98</sup> *Idid.*, p. 15.

<sup>99</sup> Dell'invito di Marc Soriano è presente un riferimento di A.M. Bernardinis nella lettera inviata all'amica Janine Despinette del 20 luglio 1964 nella quale diceva di aver letto sulla rivista «Enfance» un suo lavoro sui romanzi per i giovani e sul ruolo della storia in essi. Chiedeva alla Despinette un recapito per scrivergli e, dopo qualche difficoltà nel mettersi in contatto a causa delle

la tendenza francese a non trattare «questions litigieuses»<sup>100</sup> e dunque a evitare riferimenti a problemi religiosi, politici e sociali per salvaguardare più a lungo possibile la tranquillità del bambino. I relatori concordavano nell'affermare che un simile atteggiamento era scorretto e distante dalla tensione alla verità alla quale ciascun artista avrebbe dovuto tendere pur partendo dalla propria soggettività umana. L'idea di Soriano circa la necessità dell'«esprit historique»<sup>101</sup> trovò articolazioni ed esemplificazioni nella relazione dai toni decisi di A.M. Bernardinis<sup>102</sup>. Ella ravvisava nella produzione italiana del secondo dopoguerra la mancanza di autentico senso storico. I toni enfatici nel narrare «un susseguirsi di episodi drammatici»<sup>103</sup> senza soffermarsi sul perché e sulle sofferenze umane conducevano di fatto a suo avviso a presentare il dopoguerra «come un intervallo di sosta fra due guerre»<sup>104</sup> e a travisare lo stesso concetto di libertà. La studiosa patavina ricordava che essere liberi non significa semplicemente assenza di tirannide o di oppressione. La libertà è «un valore positivo dello spirito»<sup>105</sup> coltivato nell'interiorità senza eroismi o gesta spettacolari e a tali valori di essenzialità sarebbe stato bene ricondurre la riflessione delle nuove generazioni affinché non dovessero più trovarsi a vivere drammi epocali come quello della seconda guerra mondiale che «è stata la lotta della civiltà per la propria sopravvivenza»<sup>106</sup>.

Gli interventi dei critici, come ad esempio quello di Giovanni Cristini, permisero di ribadire l'esigenza di «cercare le leggi profonde della storia»<sup>107</sup> e che ciò sarebbe stato possibile sia nella trattazione di temi storici sia nel narrare temi attuali avendo la cura, come sostenne la scrittrice Donatella Ziliotto, di

vacanze estive, solo alla fine di agosto giunse la risposta di accettazione da parte dello studioso francese, unita ai complimenti per la fluidità di scrittura in francese che diceva di aver apprezzato nella lettera della Bernardinis. APPPV, Cassetta Edizione 1964-1966, Faldone Critici, doc. 42/4, (2f. fronte) e doc. 45 (1 f. fronte).

<sup>100</sup> M. Soriano, *Histoire et littérature de jeunesse en France. La storia nel romanzo europeo per ragazzi. Atti della II Tavola rotonda. Caorle 11-13 settembre 1964*, «Rassegna di Pedagogia», vol. 20, numero speciale, 1965, p. 27.

<sup>101</sup> *Ibid.*, p. 30.

<sup>102</sup> A.M. Bernardinis, *La storia nel romanzo italiano per ragazzi del dopoguerra. La storia nel romanzo europeo per ragazzi. Atti della II tavola rotonda. Caorle 11-13 settembre 1964*, «Rassegna di Pedagogia», vol. 20, numero speciale, 1965, p. 31. La studiosa dichiarava in apertura che la «lettura di romanzi storici [...] ha quasi sempre lasciato in me una vaga insoddisfazione, molto spesso serie perplessità». Affrontava dunque la tematica in modo critico e senza infingimenti nel rilevare l'inadeguatezza di opere della Visentini come *I martiri di Belfiore* o di Pina Ballario, *L'erba cresce d'estate*, non citate direttamente nella relazione per evidente discrezione ma chiaramente identificabili per i contenuti presi in esame.

<sup>103</sup> *Ibid.*, p. 32.

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

<sup>105</sup> *Ibid.*, p. 33.

<sup>106</sup> *Ibid.*, p. 32.

<sup>107</sup> G. Cristini, *Interventi, La storia nel romanzo europeo per ragazzi. Atti della II tavola rotonda. Caorle 11-13 settembre 1964*, «Rassegna di Pedagogia», vol. 20, numero speciale, 1965, p. 62.

«presentare problemi»<sup>108</sup> offrendo le chiavi interpretative ma senza proporre necessariamente conclusioni sbrigative. La qualità estetica e la mediazione educativa avrebbero guidato il lettore verso un atteggiamento autenticamente critico che, come argutamente osservò Carla Poesio, significava per il ragazzo «impara[re] a leggere una seconda volta perché» avrebbe imparato «a leggere in profondità, non in superficie»<sup>109</sup>.

Le argomentazioni poste trovarono una coerente sintesi nelle conclusioni affidate a Giovanni Calò che aveva presieduto i lavori. Senza mai nominarla esplicitamente, lasciò percepire la propria distanza dalla linea storiografica degli «Annales» francesi, poiché egli reputava la storia culturale *évènementielle* da sola insufficiente, sebbene di importanza primaria, nella ricostruzione storica del passato. Lo sviluppo della civiltà non poteva prescindere, a suo avviso, dalla storia di uomini e di responsabilità individuali inseriti nella concretezza e nella complessità delle dinamiche sociali del loro tempo<sup>110</sup>. Sotto il profilo narrativo si legittimava così il genere biografico che senz'altro dava risalto all'individualità ma che non doveva mirare all'individualismo. Calò infatti vide nella dimensione storica il mezzo perché si affermasse «la coscienza morale, sia come giudizio che su essa si spieghi colla obiettiva serenità e umanità che gli è propria, sia come volontà di bene che sul passato intende costruire una più cordiale comprensione e una migliore umanità»<sup>111</sup>. Se il fine educativo intese essere la costruzione dell'identità civile europea capace di reciprocità e di comprensione, rimase saldamente affidato all'orizzonte pedagogico il punto di osservazione sia nella scelta degli argomenti da narrare sia nell'interpretazione che gli scrittori avrebbero offerto di quei temi.

La continuativa volontà di dibattito dialettico attorno ai valori europei della letteratura giovanile fu ampiamente presente nei lavori della tavola rotonda del 1968. Con attenzione nei riguardi dei cambiamenti socio-culturali che investivano nel frattempo l'Europa e partendo dalla contestazione giovanile e dalle istanze dei movimenti emancipazionisti femminili, la tavola rotonda intese affrontare il tema dei *Valori della famiglia nella letteratura giovanile europea*. Si trattava di un osservatorio quanto mai privilegiato di comparazione tra paesi sia per cogliere nelle opere letterarie motivazioni a monte delle criticità rintracciabili nell'istituzione familiare alla fine degli anni Sessanta, sia perché una lettura critica dell'esistente avrebbe potuto rilanciare la famiglia quale pilastro indiscusso nelle radici storico-culturali europee e riferimento auspicato nel costruire l'identità europea comunitaria.

<sup>108</sup> D. Ziliotto, *Interventi, La storia nel romanzo europeo per ragazzi. Atti della II tavola rotonda. Caorle 11-13 settembre 1964, ibid.*, p. 74.

<sup>109</sup> C. Poesio, *Interventi, La storia nel romanzo europeo per ragazzi. Atti della II tavola rotonda. Caorle 11-13 settembre 1964, ibid.*, p. 68.

<sup>110</sup> G. Calò, *Conclusioni. La storia nel romanzo europeo per ragazzi. Atti della II tavola rotonda. Caorle 11-13 settembre 1964, ibid.*, pp. 97-99.

<sup>111</sup> *Ibid.*, p. 101.

La disamina effettuata dai vari relatori mise in rilievo diffuse criticità attorno al tema della famiglia nella produzione più recente per i ragazzi. Il panorama tedesco, analizzato da Walter Scherf, lasciava emergere la scarsa presenza dell'istituto familiare nei libri illustrati e nei racconti<sup>112</sup>. Anche in autori come Michael Ende, che si era già distinto per la storia di *Jim Bottone*, la famiglia faceva da sfondo positivo senza che su di essa si incentrassero le attenzioni narrative<sup>113</sup>. In generale nei paesi economicamente più avanzati, come Germania, Francia, Belgio e Svizzera, si rilevava un accentuato individualismo eroico dei protagonisti delle storie dando per scontata la presenza familiare o comunque non avendo la finezza di rilevare che spesso i traguardi raggiunti dall'eroe non dipendono da lui solo ma sono il frutto di relazioni costruite anche nel contesto familiare<sup>114</sup>. Interessanti le puntualizzazioni di Jan Červenka, studiosa cecoslovacca, perché invitò a non falsare la realtà con immagini distorte di infanzia<sup>115</sup> e le fece eco la posizione della polacca Anna Przeclawska insistendo che «i lettori sentono la falsità automaticamente, cancellando così il senso pedagogico della posizione»<sup>116</sup>.

Viceversa Scherf segnalò che l'accentuazione dei sentimenti familiari era spesso oggetto di strumentalizzazione a fini economico-commerciali<sup>117</sup>. Attorno al ruolo affettivo familiare s'incentrarono le osservazioni sollevate

<sup>112</sup> Scherf notava una scarsa produzione tedesca di libri illustrati aventi come tema la famiglia, accanto invece a opere francesi, americane e giapponesi tradotte in tedesco nelle quali qualche cenno sfumato compariva. Nominava tra gli altri il celebre albo di M. Sendak *Nel paese dei mostri selvaggi*, per rilevare che nell'opera la madre rimane in ombra e solo alla fine della storia è indirettamente evocato un calore materno nell'atmosfera domestica della cena pronta per l'intrepido Max. Cfr. W. Scherf, *La famiglia nella moderna letteratura giovanile tedesca*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, «Rassegna di Pedagogia», vol. 24, n. 1, 1969, pp. 46-47.

<sup>113</sup> *Ibid.*, p. 47.

<sup>114</sup> L'eroismo quasi mitico di personaggi senza legami familiari è rilevato nella relazione degli studiosi belgi V. Louis Damas e Alice De Rycke, *I valori familiari nella letteratura giovanile belga in lingua francese*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 85. La svizzera A. Ducimetière rilevava la solitudine infantile di personaggi popolari come Tintin e osservava che «il mondo presentato ai bambini, se si allarga smisuratamente nel senso dello spazio [...] si restring[e] singolarmente sul piano umano». A. Ducimetière, *I valori della famiglia nella letteratura europea*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 138.

<sup>115</sup> J. Červenka, *I valori della famiglia nella letteratura giovanile cecoslovacca*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 99.

<sup>116</sup> A. Przeclawska, *Il problema della famiglia nella letteratura giovanile contemporanea polacca*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 122.

<sup>117</sup> W. Scherf, *La famiglia nella moderna letteratura giovanile tedesca*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 51.

da A.M. Bernardinis in relazione all'Italia<sup>118</sup> e da Concha Fernández Luna in riferimento alla Spagna<sup>119</sup>, mentre la svizzera Antoniette Ducimetière rilevò lo sbilanciamento rappresentativo verso un vacuo sentimentalismo che non preparava, soprattutto le ragazze, a crescere come «persone complete»<sup>120</sup>. A.M. Bernardinis chiarì opportunamente che la «famiglia di cuore»<sup>121</sup> permeava larga parte della letteratura giovanile del nostro paese, ma nelle opere non si andava al di là di un'idea di famiglia come «dato naturalistico o un fatto di più o meno spontanea convivenza»<sup>122</sup>, mentre la famiglia avrebbe dovuto qualificarsi per la «disponibilità spirituale che deve animare tutti i membri di essa»<sup>123</sup>. La riflessione fu un invito a superare una concezione dell'istituzione familiare difensiva e oltremodo protettiva. Si auspicò la costruzione di valori e di significati tra genitori e figli con atteggiamento accogliente e disponibile al cambiamento. Le rappresentazioni letterarie si presentavano in questo senso stereotipiche anche in opere come quelle menzionate di Giana Anguissola dove, «pur nell'apparente anticonformismo, esplicitato dal linguaggio» giornalistico, era espressa «molta ansia di ordine, di rispetto delle convenzioni»<sup>124</sup>. I pregi stilistici dunque non erano ritenuti sufficienti a modificare le idee profonde di un testo e nella disamina di A.M. Bernardinis sulla letteratura per l'infanzia italiana degli anni Sessanta ella con rammarico non rintracciò un'idea di famiglia che modernamente si aprisse a costruire un orizzonte di senso valorizzando la trama di relazioni educative tra i familiari e oltrepassando i muri generazionali dell'incomunicabilità, come aveva sottolineato anche Lina Sacchetti<sup>125</sup>. Peccato che A.M. Bernardinis non si fosse accorta che nel frattempo era ad esempio uscito il racconto *Tea Patata* di Donatella Ziliotto<sup>126</sup>. L'ironia

<sup>118</sup> Bernardinis, *I valori della famiglia nella letteratura giovanile in Italia*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., pp. 31 ss.

<sup>119</sup> Fernández Luna, *I valori della famiglia nella letteratura giovanile spagnola*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., pp. 53-78. La studiosa rilevava tuttavia sfumature maggiori in ordine al contesto sociale borghese o proletario e rurale rappresentato evidenziando maggiore esigenza di ordine, di rigore formale in relazione a narrazioni aventi come riferimento marginalità o povertà familiare urbana o rurale.

<sup>120</sup> A. Ducimetière, *I valori della famiglia nella letteratura europea*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 139.

<sup>121</sup> Bernardinis, *I valori della famiglia nella letteratura giovanile in Italia*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 31.

<sup>122</sup> *Ibid.*, p. 35.

<sup>123</sup> *Ibid.*

<sup>124</sup> *Ibid.*, p. 28.

<sup>125</sup> L. Sacchetti, *I valori della famiglia nella letteratura giovanile europea*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 131.

<sup>126</sup> Il riferimento all'opera della Ziliotto, *Tea Patata*, Firenze, Vallecchi, 1968, è invece



e il rovesciamento delle situazioni nel narrare un'educazione modernamente permissiva e non apprezzata dalla piccola protagonista Teodora, avrebbero potuto trovare senz'altro un riconoscimento di valore nell'analisi di A.M. Bernardinis.

Nella differenza di proposte e di analisi, i partecipanti alla tavola rotonda di Caorle convennero nel tratteggiare un percorso, ancora in buona parte da costruire, per ridare la corretta centralità all'istituzione familiare in modo che nella lettura i giovani potessero essere avviati alla comprensione «dei valori familiari in modo realistico, avulso dai moralismi evasivi e da un presunto verismo limitato alla denuncia dei fatti offensivi e non risolto in valutazioni criticamente costruttive»<sup>127</sup>. L'auspicio rivolto agli scrittori e più in genere al mondo editoriale consisteva nella possibilità di attingere «dagli orientamenti della pedagogia i suggerimenti»<sup>128</sup> per offrire messaggi educativi interpreti delle problematicità familiari di quegli anni pur nella libertà dell'ispirazione estetico-letteraria. Se il quadro pedagogico tracciato al convegno da Marcello Peretti si collocava pienamente nell'ambito del personalismo<sup>129</sup>, non mancarono di essere menzionati da parte di Maria Guaspari Bartolozzi gli studi allora avviati da Norberto Galli nell'ambito specifico della pedagogia della famiglia<sup>130</sup>. In questo senso furono visibili basi scientifiche salde per creare una sinergia sempre più feconda tra riflessione pedagogica e letteratura giovanile che le Tavole Rotonde di Caorle ebbero il merito di promuovere in un rilancio di confronto e di crescita nazionale e internazionale.

### 5. Laboratorio di ricerca critico-letteraria

La ricostruzione storica del «Premio Europeo Città di Caorle» e il suo funzionamento, tracciati grazie all'ampia documentazione archivistica, hanno permesso di entrare nelle maglie di un vero e proprio laboratorio di ricerca. Ad esso non ha partecipato unicamente la comunità scientifica accademica ma questa si è interfacciata efficacemente con un gruppo non omogeneo di studiosi

menzionato nella comunicazione documentata secondo un *excursus* storico di L. Sacchetti. *I valori della famiglia nella letteratura giovanile europea*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 131.

<sup>127</sup> APPPV, Cassetta Edizione 1962-1964, Faldone IV/1968, doc. 6 (2 f. fronte) pubblicato integralmente in «Rassegna di Pedagogia», vol. 24, n.1, 1969, pp. 150-151.

<sup>128</sup> *Ibid.*

<sup>129</sup> M. Peretti, *I problemi della pedagogia familiare contemporanea*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., pp. 3-18.

<sup>130</sup> M. Guaspari Bartolozzi, *La famiglia nella letteratura giovanile italiana*, in *I valori della famiglia nella letteratura giovanile europea. Atti della IV tavola rotonda. Caorle 15-18 settembre 1968*, cit., p. 137. In particolare citava N. Galli, *Educazione familiare e società*, Brescia, La Scuola, 1965.

internazionali con incarichi istituzionali nell'ambito della lettura e letteratura giovanile. Il comune radicamento alla cultura e alla storia europea e il comune sguardo prospettico alla crescita civile e spirituale delle giovani generazioni attraverso la letteratura furono le matrici comuni ma, le esperienze individuali, le culture dell'infanzia, le ideologie e i metodi d'indagine appartenevano a culture di provenienza diverse tra loro. Anche lo statuto universitario non aiutava poiché l'appartenenza della letteratura per l'infanzia al settore storico-pedagogico non trovava omologie presso le università europee dove la disciplina era, e continua ad essere, studiata per lo più nell'ambito letterario-linguistico, nell'ambito delle lingue straniere, nell'ambito comunicazionale e delle arti. Nella storia del Premio le diverse sensibilità dei giurati e degli esperti, sebbene ponessero problemi di coordinamento e di un'inevitabile frammentazione di superficie, obbligarono tuttavia ad andare alla radice dei problemi portando alla luce imprevisi elementi di ricchezza culturale, di vitalità, di dinamismo. Tutto ciò fu alla base del potere generativo del pensiero che nel confronto e nell'ascolto reciproco poteva giungere a risultati originali, compresa la costruzione di criteri valutativi condivisi. Essi non furono preordinati ma si strutturarono e si affinarono nel processo di crescita del gruppo di ricerca. Ciò avvenne dall'aver vissuto edizione dopo edizione le sfide sempre nuove e diverse che le opere in concorso ponevano nel lavoro di lettura dei testi noti e meno noti o del tutto sconosciuti, nel lavoro di valutazione individuale, nel lavoro comparativo di valutazione effettuato sulle opere da ciascun componente. L'autentica *curiositas* nella ricerca del vero e del bene ha sospinto a offrire sguardi diversi sulle opere letterarie in maniera non difensiva e campanilistica ma valorizzando la convergenza dell'apporto multidisciplinare che il gruppo di lavoro poteva offrire alla letteratura per l'infanzia. Le opere premiate nelle varie edizioni furono la conferma di un orientamento valutativo che guardava lontano e al futuro. Le valutazioni si mossero oltre le tradizioni linguistiche di ciascun paese. Seppero valorizzare le osmosi tra culture interpretate letterariamente in modo originale e fondate sotto il profilo educativo. Nella storia del Premio le tavole rotonde non furono sganciate dal momento valutativo. Esse semmai costituirono uno spazio di riflessione congiunta su tematiche trasversali e posero basi e direzione per lo sviluppo della ricerca in divenire. Le conclusioni di tali occasioni furono sempre aperte sottolineando il bisogno di uno scavo perfettibile. Il confronto fu dialettico accogliendo gli interventi di critici, scrittori e anche insegnanti che portarono il punto di vista autoriale ed educativo legato al territorio.

Lungo questo cammino, non piano e scontato ma cresciuto nell'incontro umano e culturale tra studiosi, nella scoperta di opere e autori e con il desiderio utopico di migliorare il futuro dell'Europa a partire dalla letteratura e dall'amore per la lettura giovanile, andò di fatto lentamente strutturandosi una rete culturale europea di studi che ha contribuito a sottrarre l'Italia da posizioni autoreferenziali a livello critico – letterario e a far conoscere le opere italiane

all'estero. Accanto a questa circolarità è di rilevante interesse giungere a capire che il laboratorio critico – letterario avviato con il «Premio Caorle» permise ad A.M Bernardinis e al suo Settore di Letteratura giovanile dell'Università di Padova di dare un apporto decisivo allo statuto epistemologico- disciplinare sulla letteratura per l'infanzia. Esso andò strutturandosi su basi storico – pedagogiche ma si pose in dialogo con i campi della ricerca letteraria e di analisi linguistica, antropologico – culturale e sociologica. Parafrasando le parole di Mary Tibaldi Chiesa, «tornare a Caorle» volle dire continuare a nutrirsi di tale ricchezza di sguardi culturali lungo un itinerario più articolato e complesso di elaborazione critica del pensiero in grado di rispondere alle sfide della contemporaneità.



# Los tiempos de la memoria del Instituto para Obreros\*

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## *The times of the memory of the Workers' Institute*

**ABSTRACT:** This work intends to make an interpretive approximation about the evocations of the former pupils' Workers' Institute (WI) on the presence of two moments about this institution. Comparing the answers given in 1986 on the memories and experiences and the provided ones almost twenty years later – 2003-2004 – on the same school institution, it is possible to observe significant differences between them. On one hand they rectify some memories declared in 1986 and, on the other one, they add new information not declared at that time. In the first moment – of «idealized memory» (1986) – the pupils remember on the basis of the vivid and known personal experiences. In the second time -of «stimulated and learned memory» (2003-2004) – the subjects have had occasion to share memories, to do foreign readings on the shared experience and to appropriate information that have ended making their own. So, have circumstances re-formed the collective memory of the group of pupils of the WI? Does individual memory adopt the point of view of the group?

**EET/TEE KEYWORDS:** Spanish Civil War; Second Spanish Republic; Workers' Institute; Popular Education; Workers' Education; Memory of Education; Spain; XX<sup>th</sup> Century.

## *Introducción*

Recientemente sugerí la posibilidad de que la memoria presente de los antiguos alumnos de los Institutos Obreros (IO) hubiera sustituido a su memoria

\* El autor quiere agradecer a la Asociación Cultural Instituto Obrero (ACIO) su autorización para reproducir las fotografías que aparecen en este artículo.

de entonces como escolares que vivieron esa experiencia entre 1936 y 1939<sup>1</sup>. En este artículo pretendo indagar en esa cuestión.

En 1986 realicé una investigación conmemorando el 50º aniversario del IO de Valencia<sup>2</sup>. En ella fueron esenciales las muchas entrevistas y la correspondencia mantenidas con sus antiguos alumnos. Más tarde afloran nuevas informaciones y testimonios. Entre estos, veintisiete entrevistas a exalumnos realizadas entre 2003 y 2004 dentro del proyecto «Historias de vida de alumnos del Instituto Obrero de Valencia» debido a la Fundació d' Estudis i Iniciatives Sociolaborals<sup>3</sup>. Su examen permite observar algunas diferencias con respecto a las que, con distinto formato, se realizan en 1986 a esos mismos alumnos<sup>4</sup>. Las informaciones proporcionadas en 1986 sobre sus recuerdos y vivencias, y las facilitadas casi veinte años después –2003/2004–, permiten establecer como hipótesis que algunos recuerdos declarados en 1986 son rectificadas y se añaden nuevas informaciones no manifestadas entonces.

Este escrito indaga en ese hecho y sus causas, y plantea algunas cuestiones decisivas: ¿han reconfigurado las circunstancias la memoria colectiva del grupo de alumnos del IOV? ¿Es deudora la memoria individual de otras memorias? ¿Adopta la memoria individual el punto de vista del grupo? ¿Qué fiabilidad tiene la memoria en la escritura de la historia del IO?

El artículo se inicia con un breve acercamiento a los conceptos de tiempo, historia y memoria, y a lo que fueron los IO; luego se aborda la caracterización que los antiguos alumnos hacen del IO tanto en el tiempo de la «memoria idealizada» (1986) como en de la «memoria estimulada y aprendida» (2003-2004). Para ello se examinan básicamente los contenidos de la memoria escolar reconocidos entre la comunidad científica<sup>5</sup>: la arquitectura y los espacios escolares, el tiempo y los aprendizajes, los textos, la memoria evaluativa, la ideología, los alumnos y los profesores.

El método de análisis sigue el ejemplo de Karl Löwith para quien los elementos que se deben contemplar a la hora de hacer la comparación son: que lo comparable pueda medirse (en este caso los dos tiempos de la memoria del IO); que lo comparable sea lo mismo pero diferente a la vez; y que el correlato de ambos tiempos estudiados comparativamente sea diferente<sup>6</sup>.

<sup>1</sup> J.M. Fernández-Soria, *Workers' Institutes: envisioned community, living community*, «Paedagogica Historica», vol. 51, n. 4, 2015, pp. 432-433.

<sup>2</sup> Id., *El Instituto para Obreros de Valencia*, Valencia, Generalitat Valenciana, 1987.

<sup>3</sup> Archive José Luís Borbolla/Fuentes Orales, Fondo Instituto Obrero, Valencia (en adelante AJLB/FO.FIOV).

<sup>4</sup> Salvo Ángel Pozo. Me he valido solo de diecisiete entrevistas al haber alcanzado con ellas la saturación en la historia de vida que hace redundante la información adicional lograda por ese medio.

<sup>5</sup> Vid. A. Escolano Benito, *La escuela en la memoria*, in C. Lomas (ed.), *Lecciones contra el olvido. Memoria de la educación y educación de la memoria*, Barcelona, Ministerio de Educación & Octaedro, 2011, pp. 64-68.

<sup>6</sup> K. Löwith, *Max Weber y Karl Marx*, Barcelona, Gedisa, 2007, pp. 32-33.

## 1. *Tiempo, historia y memoria*

¿Por qué el constructo “tiempos de la memoria” del título? El pasado renace en el presente; el tiempo de la experiencia vuelve a ser revivido en el tiempo del recuerdo. Y es posible que, con el paso del tiempo, lo vivido sea recordado de forma diferente; de ahí que la memoria, además de ser tiempo (tiempo pasado), sea del tiempo en el que se recuerda y evoca. Toda memoria se hace a través del tiempo que la condiciona. La memoria no es monocrónica. El hecho que sucedió lo fue en un tiempo físico concreto, objetivo, pero la memoria de ese hecho acontece en un tiempo subjetivo, propio del individuo que lo evoca, en el que no solo recuerda lo que pasó sino también lo que hubiera deseado que sucediera. Porque el tiempo de la memoria está ligado a la vida y esta, como aquél, no permanece estática. En este sentido la memoria es tiempo. Memoria y tiempo están, pues, inextricablemente unidas.

Lo mismo que la memoria y la historia. Conocemos los problemas que una y otra encierran. Para unos, como Pierre Nora, todo los opone<sup>7</sup>; para otros, como Paul Ricoeur, la memoria es «la matriz de la historia», pues aquella –«guardián de la problemática de la relación representativa del presente con el pasado»<sup>8</sup> – es la que nos dice que algo sucedió; además, la memoria goza de un privilegio del que carece la historia: la pequeña dicha del reconocimiento<sup>9</sup>.

El reconocimiento enlaza con la idea de la memoria de Walter Benjamin. La memoria puede hacer visible lo invisible, lo olvidado, que la historia, sacudida por esa memoria, deberá examinar con su método científico. Dar audiencia a la memoria, aceptar su capacidad de cuestionar la autoridad de lo fáctico y de rectificar lo que la historia ha dado por suficientemente explicado, es una exigencia ética de reconocimiento de un pasado omitido o silenciado. En este sentido, la memoria puede abrir expedientes que la ciencia ha archivado y archivar historias que la ciencia considera en vigor<sup>10</sup>.

## 2. *Los Institutos para Obreros*

En plena Guerra Civil, el 21 de noviembre de 1936, se crea un «Bachillerato abreviado» – integrado por cuatro cursos semestrales y un año de estudios en el extranjero – para trabajadores industriales y agrícolas de edades comprendidas entre los 15 y los 35 años, aunque mientras dure la guerra sólo podrían acceder

<sup>7</sup> P. Nora (ed.), *Entre Mémoire et Histoire. La problématique des lieux*, in *Le lieux de mémoire*, Paris, Gallimard, 1984, Vol. I, p. XIX.

<sup>8</sup> P. Ricoeur, *La memoria, la historia, el olvido*, Madrid, Trotta, 2003, p. 119.

<sup>9</sup> P. Ricoeur, *L'écriture de l'histoire et la représentation du passé*, «Annales. Histoire, Sciences Sociales», vol. 55, n. 4, 2000, p. 736.

<sup>10</sup> R. Mate, *Benjamin o el primado de la política sobre la historia*, «ISEGORÍA», n. 4, 1991, p. 65.

a él los no movilizados, los incapacitados para las armas y las mujeres. Pretendía favorecer que los obreros leales a la República y con capacidad suficiente, pudieran conseguir a la mayor brevedad los beneficios de la enseñanza superior. Tres días después se crea en Valencia el primer Instituto Obrero. El plan de estudios, ajustado a la duración abreviada de los mismos, fue similar al de los Institutos Nacionales. Junto a la gratuidad absoluta, completada con un sistema de indemnizaciones a quienes abandonaron un trabajo productivo que sostuviera a su familia, destaca el sistema de internado al que se acogen la mayoría de los alumnos y algunos profesores evacuados del Madrid sitiado por las tropas franquistas.

Pasaron por sus aulas 356 alumnos de ambos sexos y de diferentes ideologías. El desarrollo de la guerra impidió que ninguno de ellos obtuviera el título de Bachiller. Inserto en una política de «profunda significación social, cultural y humana»<sup>11</sup> y de dinamización cultural, el IO supuso «la más notable transformación educacional» realizada hasta entonces en España<sup>12</sup>.

### 3. *Arquitectura y espacios escolares*

La arquitectura y el patrimonio escolar quizá son lo más inalterable de la memoria de las instituciones educativas. Sin embargo, los mismos edificios en su estructura y configuración, testimonian los cambios, las representaciones o símbolos de la sociedad, y manifiestan las razones de esa arquitectura y sus modificaciones. Así sucedió con los IO, en los que destacan sus espléndidos edificios – en nuestro caso el Colegio de San José de los Jesuitas (Pic. 1) –, lo que se interpreta no solo como alegoría de la nueva concepción no aristocrática de la educación – que pone al alcance del pueblo lo que antes era un privilegio de las clases pudientes –, sino también como la exaltación de la idea que encierra esa experiencia educativa.

Quizá sea la perdurabilidad de la arquitectura escolar lo que ancla en la memoria de los estudiantes la fisonomía de su Instituto, tanto que evocan con minucioso detalle la distribución de las dependencias escolares y las mejoras de acondicionamiento<sup>13</sup>. Esas mejoras se integraban en las tareas de remodelación del edificio en las que participaron los mismos alumnos, entre los que había

<sup>11</sup> J. Renau, *El Instituto Obrero. La cultura al servicio del pueblo*, «Nueva Cultura», n. 1, 1937, p. 251.

<sup>12</sup> J. Marinello, *Cultura en la España Republicana*, New York, Spanish Information Bureau, 1937, p. 12. Más información en Fernández-Soria, *El Instituto para Obreros de Valencia*, cit., y F. A. González Redondo, C. Escrivá Moscardó, G. Benavides Escrivá, *On the access of the working class to higher education in Spain: from the Institute of Scholar Selection to the Institutes for Workers*, «History of Education & Children's Literature», vol. X, n. 2, 2015, pp. 213-220.

<sup>13</sup> A. Colomer Belda, carta al autor, Octubre 1986. Archivo del autor (en adelante AA).



mano de obra cualificada (carpinteros, albañiles). Los trabajos de adaptación a las nuevas funciones son recordados por todos sin apenas variaciones tanto en 1986 como en 2003. Tal vez la prensa de esos días – que los alumnos han mantenido celosamente guardada – ayudara a fijar ese recuerdo<sup>14</sup>.

Pero, tras casi veinte años de esta primera evocación, la memoria de los escolares del IOV proporciona informaciones nuevas sobre su implicación en esos trabajos de adaptación. Aunque en 1986 el protagonismo de los alumnos en este aspecto está presente, en 2003 se realiza: son ellos los que, ante el temor de que el retraso de las obras demore el inicio de las clases, proponen colaborar con un propósito formativamente virtuoso ligado a la función que el IO estaba llamado a cumplir; así, un alumno dice que ayudaban en las tareas de remodelación porque «teníamos mucha prisa en que se acabaran las obras» para que el centro empezara a dar sus frutos<sup>15</sup>. Más llamativa es la afirmación de que en esos trabajos participaban también las chicas, aunque en tareas entonces tenidas como más «propias de su sexo»: «los chicos trabajaron una cosa y, lógicamente, las chicas a fregar y a limpiar, que es lo que estuvimos haciendo»<sup>16</sup>. Esta evocación no afloró en ningún momento en 1986, quizá por la imagen idealizada que entonces se dio del IO, de la que formaba parte su régimen de coeducación y de igualdad entre sexos.

Los escolares evocan emocionados su paso por los lugares surgidos tras esa remodelación: «se me atasca la imagen de aquellos días, aquellas aulas, los pasillos, los dormitorios, la biblioteca, los patios de recreo [...]»<sup>17</sup>. La peculiaridad de este ensayo pedagógico, concebido como internado en el que convivieron profesores y alumnos, convirtió todas las dependencias del edificio en espacios



Pic. 1. Vista parcial del Colegio de “San José” de los PP. Jesuitas (Foto del autor, 1986).

<sup>14</sup> Vid. *La Voz Valenciana*, 27 Enero, 1937.

<sup>15</sup> J. Gil Edo, entrevista por Escrivá & Durbán, 10 Diciembre 2003, transcripción, AJLB/FO.FIOV.

<sup>16</sup> M. L. Pérez Reyes, entrevista por Escrivá & Durbán, 15 Octubre, 2003, transcripción, AJLB/FO.FIOV.

<sup>17</sup> Carta de J. Jiménez Matías a R. García Cidoncha, Barcelona 3 Noviembre 1986. Copia de esta carta en AA.

de formación y de instrucción. Las aulas, que acogían a alumnos divididos en tres clases según su aprovechamiento, instruían y educaban. Los pasillos, patios y jardines, el comedor, la biblioteca y el club de recreo, actuaban a menudo como prolongación de las aulas y siempre como espacios de socialización y ámbitos que construyen el IO como comunidad.

Los patios se convirtieron en escenarios socializadores de lo que significó el IO. Por ellos pasaron figuras simbólicas de la cultura (Antonio Machado, Jacinto Benavente), de la política (varios ministros y el embajador de la URSS, Rosemberg), de la milicia (como *El Campesino*)<sup>18</sup>, de los medios de comunicación (Ilya Ehrenburg, Dorothy Parker), fotógrafos y cineastas (Walter Reuter, Val del Omar), etc. Con el transcurso de la guerra, las aulas y los patios adquieren también otra función, la de entrenar a los escolares para sobrevivir en ella, sabiendo que, más pronto o más tarde, muchos de ellos acabarían alistándose, como así fue. En 1986 se recuerdan las clases de armamento en las aulas y los ejercicios de orden cerrado en los patios<sup>19</sup>; en 2003 ese recuerdo se agranda – son muchos los que mencionan la excavación de trincheras en zigzag junto al campo de fútbol – y se pormenoriza sacando los ejercicios de instrucción a unos solares próximos al IOV y poniendo incluso nombre a los instructores<sup>20</sup>. Una vez más cabe preguntarse hasta qué punto en este segundo tiempo no alimentó la memoria de los escolares el reportaje fotográfico de Reuter en el que aparece nítidamente la figura del oficial Edo impartiendo clase de armamento a los escolares, y otras instantáneas que recogen los ejercicios de instrucción militar (Picc. 2 y 3).

Los pasillos, patios y jardines, el comedor, el club y la biblioteca, ensancharon las paredes del aula, que se introduce en sus confines, al tiempo que facilitaban la cimentación del IO como una comunidad real anudada con fuertes lazos de camaradería.

Aunque en 1986 los alumnos insisten en reconocer a las aulas un papel meramente instructivo, también lo tuvieron educativo en los valores de lo que significaba la República. Muestra de esto es una evocación compartida en 1986 y en 2003 aunque con matices significativos en un tiempo y otro. En la primera fecha, los alumnos recuerdan que en algunas aulas y en el club de recreo, el pintor y dibujante madrileño Eduardo Vicente pintó murales con imágenes alegóricas sobre el trabajo y escenas de guerra a modo de recordatorio permanente de que igual que en los frentes de batalla los soldados luchan con las armas, los alumnos en el IO deben contribuir a esa lucha con su esfuerzo y dedicación el

<sup>18</sup> Esta visita la describe un alumno en 2004 con visible acritud por la parafernalia y prepotencia que mostró este militar (Á. Pozo Sandoval, entrevista por Escrivá & Durbán, 8 Octubre, 2003, transcripción, AJLB/FO.FIOV).

<sup>19</sup> F. Sánchez Padilla, entrevista con el autor, Octubre 1986, AA.

<sup>20</sup> G. Aparicio Selvi, Vicente Peña Doménech, F. Ramírez Izquierdo, entrevistas por Escrivá & Durbán respectivamente 12 February, 2004, 28 Enero, 2004 y 12 Noviembre, 2003, transcripción, AJLB/FO.FIOV.



Pic. 2. (left) El Oficial Edo enseñando a los alumnos del IOV el funcionamiento de las armas (Luís Vidal, 1937) Fuente: ACIO. Pic. 3. (right) Alumnos del IOV realizando instrucción militar (Luís Vidal, 1938) Fuente: ACIO.

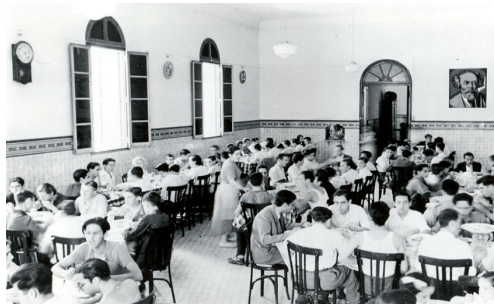
estudio. La diferencia entre ambos tiempos de la memoria del IOV está en que en el primero los alumnos afirman que esos murales son destruidos cuando los jesuitas, antiguos propietarios del centro, vuelven a instalarse en él, mientras que en el segundo momento hay quien recuerda que esas figuras alegóricas ya habían desaparecido en el tercer trimestre porque entonces el IO «se hizo más lo que debía ser, una cosa creada por un gobierno de la República y no por un partido»<sup>21</sup>. Evidentemente, también educaban las imágenes estáticas de las paredes del aula mostrando otras imágenes, otros símbolos (Pic. 4).

El comedor, aparte de su inherente función ejerció también las del aula: una instructiva, que es recordada tanto en 1986 como en 2003 al evocar las mesas presididas por turno entre los profesores, momento en el que también ejercían como tales; y otra educativa, que es evocada en 2003 al describir sus paredes con iconografías de figuras emblemáticas como la del retrato de Bakunin (Pic. 5).

A este respecto es oportuno preguntarse si la aparición de este recuerdo en 2003-2004 no es avivado por el descubrimiento por esas fechas del reportaje fotográfico de Walter Reuter sobre el IOV – motivo al poco tiempo de varias exposiciones – donde es visible esta fotografía.

La biblioteca es uno de los espacios de más pronta recordación entre los antiguos alumnos, no solo por la riqueza de sus fondos y la comodidad de sus instalaciones, sino sobre todo por haberse constituido en un valiosísimo auxiliar en sus estudios y en parte imprescindible de la metodología seguida en el aprendizaje, como luego se dirá. Ahora solo cabe resaltar una información no referida por los alumnos en 1986 y sí en 2003: la quema de la biblioteca al terminar la guerra; una alumna, vecina del IO, que, ante la insistencia de los entrevistadores en recordar la actividad estudiantil en la biblioteca, asegura

<sup>21</sup> Ramírez, entrevista.



Pic. 4.(left) Una de las aulas del IOV. En las paredes carteles alusivos a la revolución mexicana donde se puede leer: ¡Viva Zapata y la clase obrera y campesina!” (Walter Reuter, 1937) Fuente: ACIO. Pic. 5. (right) Comedor del IOV. Las mesas presididas por profesores. En la pared un retrato de Bakunin (Walter Reuter, 1937) Fuente: ACIO.

haberla visto arder: «yo vivía cerca del Instituto y claro, yo por allí pasaba y no sabían quién era, yo vi como la quemaron»<sup>22</sup> (Pic. 6).

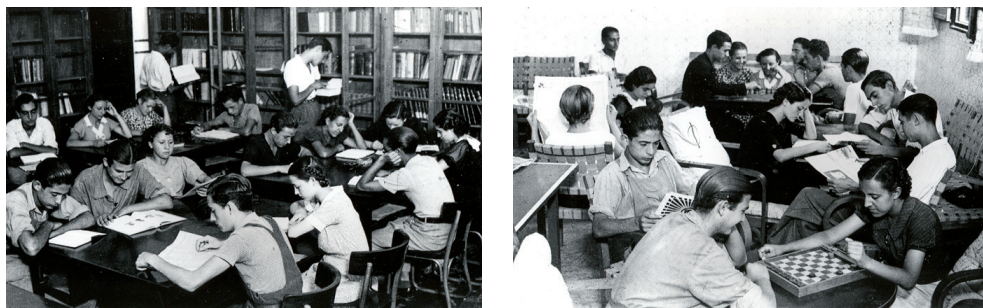
En el club de recreo no solo recuerdan sus ratos de esparcimiento con juegos de mesa o leyendo la prensa, sino también las tertulias en las que a menudo debían disertar sobre un tema bajo la tutela de un profesor que, por turno entre ellos, tenía ese encargo. En otras ocasiones los profesores aprovechaban estas tertulias e «impartían cosas de su asignatura»<sup>23</sup> (Pic. 7).

#### 4. *Tiempos y aprendizajes escolares*

Hubo un tiempo escolar previo al que marcó su condición de alumnos del IOV, ese en el que realizaron las pruebas selectivas de ingreso. Aquí concuerdan ambos tiempos de su memoria. Para todos fueron unas pruebas serias que pretendían descubrir la aptitud y la actitud de los candidatos más que sus conocimientos. En este aspecto la memoria de 2003 enriquece la de 1986. Gracias a ella sabemos que el ejercicio del tema libre elaborado por los candidatos mostraba una inquietud bastante generalizada ante la situación social del momento y, en ocasiones, también un cierto oportunismo; así, entre los temas libres que los aspirantes desarrollaron ante el tribunal, figuran *El Instituto Obrero*, *Libertad, igualdad y fraternidad*, *Un hospital de sangre*, y escritos sobre las novelas *Mare Nostrum*, de Blasco Ibáñez, *La Madre*, de Máximo Gorki, y *Sin novedad en el frente* de Erich María Remarque, etc. Entre

<sup>22</sup> A. García Extremeño, entrevista por Escrivá & Durbán, 19 Noviembre, 2003, transcripción, AJLB/FO.FIOV.

<sup>23</sup> Ramírez, entrevista.



Pic. 6. (left) Biblioteca del IOV (Walter Reuter, 1937) Fuente: ACIO. Pic. 7.(right) Club del IOV (Walter Reuter, 1937) Fuente: ACIO.

los temas de redacción obligados propuestos por el tribunal recuerdan *El mejor amigo*, *El amor y el odio*, textos de Azorín (Pic. 8).

Sobre el tiempo escolar como alumnos del IO, su memoria apenas cambia. Aunque solo uno de ellos repara en 2003 en la presencia de un enorme reloj en el comedor<sup>24</sup> que tasaba el que era uno de los mejores momentos del día, todos – tanto en 1986 como en 2003 – coinciden en haber vivido jornadas de trabajo intenso con el tiempo muy reglado; en ellas que se cumplía el cronograma oficial de los estudios que terminaban a las 12 de la noche con sesiones de repaso bajo la supervisión de un profesor. A partir de las 17,30 el estudio – obligatorio – con la presencia de profesores que atendían las consultas de los alumnos. En los domingos se realizan excursiones donde las lecciones se imparten en vivo. En este tiempo escolar acontecían tanto los aprendizajes derivados del estudio como otros de carácter social que se colaban por los resquicios del IO.

El plan de estudios es confirmado en 1986 y en 2003 por todos los alumnos, que aprecian la atención predominante proporcionada a las ciencias de la naturaleza y a los conocimientos geográficos e históricos, como correspondía a un momento social y político necesitado de explicaciones sobre las causas de la guerra que, en efecto, impregnó las enseñanzas. Más allá de lo intencionado o no del proceso de enseñanza-aprendizaje, la mera selección de los textos dejaba traslucir el ambiente de una sociedad en guerra, como luego se verá.

En ambos momentos de su memoria, es unánime entre los alumnos el recuerdo de haber recibido una enseñanza profunda y avanzada; por ejemplo, han evocado cómo en el IO se explicaba la formación de los continentes según la teoría de la tectónica de placas de Wegener, mientras que en otros centros se seguía a Humboldt<sup>25</sup> que hacía intervenir en su constitución el relato bíblico del diluvio universal. La hondura de los estudios era tal – recuerda un alumno – que una

<sup>24</sup> Pozo, entrevista.

<sup>25</sup> M. Zamorano Molina, entrevista con el autor, Noviembre 1986, AA.



Pic. 8. (left) Tribunal seleccionador para el ingreso en el IOV. Segunda convocatoria, 1937-38. En la pizarra se lee: «La Primera Brigada de Estudiantes Obreros os saluda fraternalmente» (Luis Vidal, 1937). Fuente: ACIO. Pic. 9. (right) El profesor Francisco Carreño con un grupo de alumnos dibujando al natural (Luis Vidal, 1937) Fuente: ACI.

evaluación externa en el segundo semestre concluyó que los escolares del IOV tenían un nivel equivalente a los de quinto curso del Bachillerato tradicional<sup>26</sup>.

La enseñanza se recuerda activa e intuitiva: el dibujo se hacía del natural (Pic. 9); y el laboratorio, el contiguo Jardín Botánico y las excursiones de los domingos, proporcionaban el contrapunto práctico a las lecciones teóricas de biología y ciencias naturales. La misma aquiescencia se produce al describir el ritmo de los aprendizajes, basados, primero, en la información del profesor en el aula y, luego, en la actividad del alumno en la biblioteca completando la lección recibida, ya individualmente, ya – y esto es lo más recordado – en grupos constituidos en «brigadas de choque» stajanovistas que facilitaban el trabajo colectivo y la ayuda mutua: por la noche, los miembros de la brigada se reúnen y cada uno informa al resto del grupo de la parte de la asignatura de la que se hubiera encargado ampliar<sup>27</sup>. Porque no había libros. En esto, en 1986 el recuerdo es unánime, siendo motivo de orgullo para los alumnos por el esfuerzo que requería su aprendizaje y por el carácter novedoso y moderno del hecho en el tiempo en que fue recordado.

Los apuntes – algunos de los cuales se han conservado mostrando el rigor de sus contenidos y la belleza de su factura– sustituían la carencia de textos, cuya ausencia algunos alumnos lamentan: «Echábamos de menos la falta de textos y nos resultaba en principio difícil adaptarnos al régimen de apuntes y

<sup>26</sup> R. Onsurbe Lorenzo, entrevista con el autor, Noviembre 1986, AA.

<sup>27</sup> Las *Brigadas de Choque* para el estudio fueron concebidas como un medio de emulación: «el estudiante que forma parte de ellas tiene el deber de estudiar más y mejor que los demás y de explicar todo lo que sabe a sus camaradas que no están instruidos como él» (*Juventut. Service d'Information sur la Jeunesse Espagnole*, n. 24, 1937, p. 5).

consultas posteriores en la biblioteca o con los profesores»<sup>28</sup>. El único texto cuya existencia reconocían los alumnos en 1986 era *La Barraca* de Blasco Ibáñez, otro sobre las conjugaciones francesas,<sup>29</sup> diccionarios de francés y español (probablemente el de Pedro Alcalá-Zamora), y un atlas de consulta, quizá el *Atlas Aguilar*. No obstante, este recuerdo que mitifica la ausencia de libros de texto, ha sido corregido en 2003, donde, además, se refiere la presencia de manuales de Matemáticas – probablemente los de Rey Pastor y Puig Adam –, de Biología – seguramente el de Alvarado<sup>30</sup> y el de Rioja<sup>31</sup> –, de Física y Química –, de Ciencias Naturales – quizá de Federico Portillo<sup>32</sup> – y sendos libros de Gramática y Literatura de Samuel Gili Gaya<sup>33</sup>. Ciertamente que en 2003 otros reiteran la ausencia de libros de texto en el mismo tono en que se refería en 1986, pero entre ellos también los hay que muestran una actitud no exenta de crítica cuando achacan esa ausencia a la falta de medios y a ser el IO un proyecto poco preparado, carencias que suplió el buen hacer de un competente claustro de profesores<sup>34</sup>.

Esta particularidad – que constituye uno de los rasgos distintivos del IO – y otras colaterales que se mencionarán después, han inducido a calificar al IO como modelo de enseñanza activa, cooperativa, participativa, por descubrimiento, etc. Y, lo que es aún más llamativo, ha dado lugar a que en 2003 algunos alumnos afirmaran que la pedagogía del IO se inspiraba en el espíritu de la Institución Libre de Enseñanza (ILE)<sup>35</sup>, aduciendo entre otros argumentos éste de otro alumno que contradice en alguna de sus partes los fundamentos del IO (proletarios) y de la ILE (burgueses): «El proyecto del IO era continuación de la Institución Libre de Enseñanza, que nació como un método de enseñanza laica. Se trataba de que el trabajador tuviera las mismas posibilidades que otros de su edad sin tener que preocuparse de problemas económicos»<sup>36</sup>. Esta afirmación puede tener su origen en otras del mismo tenor compartidas por algunos estudiosos con exalumnos del IOV y luego difundidas en sus escritos y conferencias. Así, Lucila Aragón sostiene en una muy divulgada *Guía urbana* que la metodología utilizada en el IO era «heredera de la Escuela Moderna y de la ILE»<sup>37</sup>. Y José Beltrán, en

<sup>28</sup> Colomer, carta.

<sup>29</sup> Seguramente aluden a *Les conjugaisons françaises*, Valencia, Publicaciones del Instituto para Obreros, 1937.

<sup>30</sup> S. Alvarado Fernández, *Biología para el Bachillerato Universitario*, Barcelona, Talleres Gras, 1929.

<sup>31</sup> E. Rioja y O. Cendrero, *Prácticas elementales de biología*, Santander, Aldus, 1938.

<sup>32</sup> F. Portillo, *La vida de los animales*, Madrid-Barcelona, Editorial Nuestro Pueblo, 1937.

<sup>33</sup> Deben referirse a *Resumen práctico de Gramática española* y a *Iniciación en la historia literaria española*, ambos publicados en Valencia por Editorial Nuestro Pueblo, 1937.

<sup>34</sup> Altier, entrevista.

<sup>35</sup> J. Soriano Mir, entrevista por Escrivá & Durbán, 1 Julio, 2003, AJLB/FO.FIOV.

<sup>36</sup> Á. Pozo, *Relato de vida*, in L. Aragón Carrión, *Ecos del pasado, voces del presente: Aproximación a la memoria social desde una experiencia educativa de la Segunda República, los Institutos para Obreros*, «Quaderns de Ciències Socials», n. 8, 2007, p. 39. Este artículo es fruto de un trabajo de investigación defendido en la Universidad de Valencia en 2005.

<sup>37</sup> L. Aragón, J.M. Azkárraga, J.M. Salazar, J. Salazar, *Guía urbana. Valencia 1931-1939. La*

una conferencia pronunciada en 2003 en el marco de las jornadas «El Instituto Obrero de Valencia: proyecto pedagógico de la República», afirmó que «sin duda, el pensamiento de Dewey debió influir directamente en la concepción del IO a través de las traducciones que Lorenzo Luzuriaga llevó a cabo de las obras del pensador norteamericano»<sup>38</sup>. Algo más tarde, en 2006, esta afirmación se amplía diciendo que «el Instituto Obrero, lejos de propugnar una enseñanza de elite, supuso la concreción de una iniciativa de educación popular» y que bebe «de las fuentes de la Escuela Nueva y de la influencia de John Dewey»<sup>39</sup>.

Este tipo de enseñanza colaborativa y activa avivó una memoria evaluativa anclada en el recuerdo de unos alumnos que en 1986 niegan la realización de exámenes y se ufanan de haberse beneficiado de una evaluación continua que consideran moderna y que fue posible por la convivencia en el régimen de internado al que también se acogieron algunos profesores. Esta afirmación, recordada unánimemente en 1986, es corregida en 2003. En este otro tiempo de la memoria del IO, son varios los alumnos que reconocen al cabo de los años la realización de exámenes, que, para unos, se hacían «de una manera informal, sin presionar»<sup>40</sup>, y que para otros consistían en una forma de evaluar la capacidad<sup>41</sup>, exámenes que se realizaban «todas las semanas»<sup>42</sup> y «de hoy para mañana»<sup>43</sup>.

¿Se refleja en esa memoria evaluativa el aprendizaje social y político de los alumnos? Estos rechazan, sobre todo en 1986, cualquier intención que desde los estudios y profesores se dirigiera a ese fin. Pero los apuntes de clase conservados y los textos que según los escolares fueron utilizados por los profesores en su docencia, permiten concluir que la guerra, con todas sus secuelas, se colaba en el IO, poroso a la calle y permeable a sus inquietudes. Así, en Lengua se utilizaron algunos sustantivos de clara significación política como militarización, revolución, facción, unificación; y en Literatura textos que también debían trabajar los alumnos, como el «Romance del Rey Rodrigo o cómo se perdió España», u otro de Azorín sobre los rumores, uno de los temas de preocupación en la retaguardia, que combatió el teatro de urgencia en obras como *El Bulo* de Ontañón, *La Cola* y *Los Sentados* de Miguel Hernández, o *Lección y escarmiento del derrotismo*. Se trabajaron también textos de la literatura picaresca, cuyo realismo se enfrentó al tono idílico de la novela pastoril, y de *El Quijote* que ofrecen sobradas ocasiones

*ciudad en la 2ª República*, Valencia, Universitat de València, 2007, p. 35. Esta *Guía* es ampliación de otra virtual inaugurada en 2005 donde se sostiene esa idea (<[www.uv.es/republica](http://www.uv.es/republica)>).

<sup>38</sup> J. Beltrán Llavador, *Un sueño de la República: El Instituto Obrero*, in J. Beltrán Llavador, *Márgenes de la educación. La lucha por la claridad*, Alzira, Ed. Germania, 2002, p. 65.

<sup>39</sup> J. Beltrán, J. Hernández, A. Marrero, *Mutaciones del campo educativo: nuevas reglas del juego en la modernidad radicalizada*, ISA-XVI ISA World Congress of Sociology, Durban, 2006, p. 9, <[http://www.uv.es/fjhernan/Textos/soc\\_educacio/durban.pdf](http://www.uv.es/fjhernan/Textos/soc_educacio/durban.pdf)> (último acceso: 11 de Marzo de 2016).

<sup>40</sup> F. García Bayarri, entrevista por Escrivá & Durbán, 11 Enero, 2004, AJLB/FO.FIOV.

<sup>41</sup> Peña, entrevista.

<sup>42</sup> Ramírez, entrevista.

<sup>43</sup> Pérez, entrevista.



para oponer lo proletario y lo burgués<sup>44</sup>. En Geografía se estudiaba la política no expansionista de Francia y Rusia y la imperialista de Alemania, recordando que la guerra que libraba España era una consecuencia de los afanes expansionistas de las naciones totalitarias<sup>45</sup>.

Aunque los alumnos no necesitaban estos aprendizajes, pues acudían al IO equipados ideológicamente tanto por su ascendencia familiar – generalmente sindicalista y de clase – como por su adscripción a organizaciones juveniles o sindicales partícipes de los valores que defendía la República en guerra, indudablemente aquellos se reafirmarían a través de sus estudios y del ambiente ideológico que se respiraba en el IO.

### 5. *Las ideologías*

La memoria escolar de los alumnos –como representación de su pasado y conjunto de experiencias vividas en común por ellos como grupo – es fuente de identidad y de cohesión, y les confiere sentido de pertenencia a la comunidad del IO a la que vertebra. De aquellas experiencias formó parte su sistema de valores, su forma de concebir y de representarse entonces el mundo – su ideología –, que llegó a aglutinarlos como grupo. Debemos, pues, aludir a la ideología de esos jóvenes porque ayudará a entender sus interpretaciones de aquella realidad, sus recuerdos, su constitución como una comunidad política con rasgos y convicciones claramente políticas. Sus creencias, sus interpretaciones, sus imágenes y representaciones mentales adquiridas en su proceso de socialización, explican mucho su memoria escolar.

Lo primero que sorprende en la memoria de estos escolares en 1986, es su esfuerzo – aunque no generalizado – por negar cualquier tipo de ideologización y proselitismo dentro del IO, algo que sus mismos testimonios no logran ocultar y que algún alumno confirmó tajante<sup>46</sup>; sin embargo, su memoria de 2003 es más rotunda en el reconocimiento de conductas proselitistas y de actuaciones ideológicas. Que llegaran al IO con años de pertenencia a organizaciones juveniles o sindicales y que su ingreso estuviera avalado por ellas, es algo que la misma norma exigía y la prensa partidista señaló aunque para exigir que fueran esas organizaciones las que controlaran en el IO a sus alumnos-afiliados, y no la Federación Universitaria Escolar (FUE), asociación pretendidamente profesional y no de clase. Un alumno afirmaba que la FUE «jamás nos dijo

<sup>44</sup> Colomer, carta.

<sup>45</sup> R. Onsurbe Lorenzo, *Apuntes de la clase de Geografía e Historia*, 2º semestre (Copia en AA).

<sup>46</sup> Gil Edo (entrevista con el autor), exclama: «¿Cómo no iba a ver proselitismo durante la guerra civil? Negarlo sería absurdo».

esta bandera hay que seguir. La FUE no»<sup>47</sup>. Al parecer, no sucedía lo mismo con las Juventudes Socialistas Unificadas (JSU) en las que predominaba un grupo de ideología comunista bien organizado que le permitía mandar en ellas «y, por ende, en el Instituto Obrero»<sup>48</sup>; su líder, Ángel Pozo, fundó una célula comunista integrada por alumnos y profesores que, aunque funcionaba fuera del IO, llevaba a él sus consignas, como captar a los alumnos y manifestar que el Partido Comunista (PC) sería la opción más válida al finalizar la guerra<sup>49</sup>. Las Juventudes Libertarias (JJLL) fueron asimismo muy activas políticamente. Claro que también hubo alumnos sin adscripción política manifiesta, que resistieron los esfuerzos de captación de sus compañeros más politizados.

No es posible, pues, hablar de apoliticismo en el IO<sup>50</sup>, tampoco de ausencia de proselitismo. Por si no bastara con lo anterior, sirvan también otros elementos de juicio, señalados en 2003, como la propuesta de expulsar a un alumno por haber criticado el cambio de postura del ministro Jesús Hernández para con Largo Caballero, o cómo afectaban a la vida del centro los acontecimientos políticos – como las disensiones entre anarquistas y comunistas – y los episodios bélicos, como la pérdida de Málaga, tras la cual los alumnos – instigados por Pozo<sup>51</sup> – acuerdan manifestarse por las calles<sup>52</sup> para levantar la moral de las gentes, irrumpir por grupos en cines interrumpiendo la proyección y en salas de fiestas mitineando sobre el significado de esa derrota. Ya hemos dicho que el IO no era ajeno a la calle y que ésta introducía en él sus inquietudes y sus luchas ideológicas y políticas.

El reflejo de estas aparece más resaltado en la memoria que los alumnos evocan en 2003. En ella se reconoce abiertamente su adscripción a distintas asociaciones políticas y juveniles, lo que «creaba un cierto roce porque [...] España en esa época estaba muy politizada, todos estábamos politizados por una idea o por otra [...] pero no llegaba la sangre al río, sino que el que tenía una idea se la guardaba»<sup>53</sup>. Pero las diferencias no siempre se encubrían. Un alumno recuerda que surgían en sus asambleas<sup>54</sup>, y otro, Ángel Pozo, se confiesa organizador del círculo de las JSU en el IO donde dio muestras de su fuerte concienciación política. Un ejemplo de ella fue su enfrentamiento con el primer director del IO, Julio Hernández, por pegar carteles contra el Partido Obrero de Unificación Marxista y mandarlos retirar; la confrontación derivó en una huelga general en el Instituto – consistente

<sup>47</sup> Onsurbe, entrevista.

<sup>48</sup> Sánchez Padilla, entrevista con el autor.

<sup>49</sup> Colomer, carta.

<sup>50</sup> Muestra de esto es la misma disparidad de opiniones ideológicas con que es acogida la creación del Instituto Obrero que, además, compartía edificio con otro burgués, el Instituto-Escuela.

<sup>51</sup> Zamorano, entrevista.

<sup>52</sup> Mas Quiles, entrevista.

<sup>53</sup> E. Monzó Torrijos, entrevista por Escrivá & Durbán, 24 Septiembre, 2003, AJLB/FO.FIOV.

<sup>54</sup> Zamorano, entrevista.

en no estudiar – que se salda con la destitución del director<sup>55</sup>. El mismo Pozo afirma que los alumnos de la JSU salían por las noches a pegar carteles, algunas veces acompañados por el afamado escultor Alberto Sánchez, profesor de dibujo en el IO. La preponderancia del PC era visible en el centro; incluso la influencia soviética, que fue negada en ocasiones en 1986<sup>56</sup>, se vislumbra más nítida en 2003; varios hechos lo confirmarían: la ideación y organización de los IO según el modelo de las «Rabkafs» o Facultades obreras soviéticas, la creación del himno del IO –«Estudia, estudia con tesón, para reconstruir España y hacerla potente nación» – con música de la Marcha de la Unión Soviética<sup>57</sup>, la traducción de la constitución rusa para el aprendizaje del inglés<sup>58</sup>, el donativo del ejército ruso de un lote de gabardinas del uniforme de aviación por las que se llegaron a reconocer por las calles a los alumnos del IO<sup>59</sup>, y la promesa de estudiar en universidades rusas al finalizar sus estudios en el IO<sup>60</sup>.

Las innegables diferencias ideológicas y políticas existentes entre los alumnos provocaron que, al acabar la guerra, «muchas amistades fallaran porque entonces se descubrieron cosas que allí se ocultaban»<sup>61</sup>. Seguramente la alumna que así se expresa alude sobre todo a la existencia en el IO de alumnos no simpatizantes con la ideología que sustentaba el IO, como luego se dirá.

En la memoria de los alumnos está presente el fundamento político e ideológico de los IO: posibilitar al obrero capacitado y leal al régimen el acceso a los estudios superiores. Esta es considerada por todos los alumnos la razón de ser de esa institución. Lo fue en 1986, cuando un alumno afirmaba que «se trataba de la puesta en marcha de un ambicioso proyecto destinado a la formación de los más auténticos hijos de España», es decir, los trabajadores, adjetivo de la República (de trabajadores), que, de haber culminado con éxito, «habría supuesto el paso a manos del proletariado de los destinos patrios»<sup>62</sup>; y lo fue también en 2003, momento en el que se percibe mayor determinación a la hora de manifestar aquel fundamento y de hacer una valoración menos sublimada del mismo: formar los cuadros dirigentes de la República. Un alumno cree que el IO se diseñó para que quienes salieran de sus aulas fueran «los cuadros y la gente dirigente [...], para que nosotros fuésemos los que impregnásemos a la sociedad de otro sistema

<sup>55</sup> Pozo, entrevista.

<sup>56</sup> Una excepción fue A. Colomer Belda que en 1986 informó de la existencia de «una invitación clara [a los alumnos] para integrarse, terminados los estudios, en las Universidades Soviéticas» (Colomer, entrevista con el autor).

<sup>57</sup> Pozo, entrevista.

<sup>58</sup> J.V. Mas Quiles, entrevista por Escrivá & Durbán, 3 Marzo, 2004, transcripción, AJLB/FO. FIOV.

<sup>59</sup> Zamorano, interview; Aparicio, entrevista. Esta información fue proporcionada ya en 1986 por Agustín Colomer Belda al recordar a los alumnos del IO «enfundados en unas gabardinas flamantes que nos regalaron de la URSS» manifestándose en apoyo del Ejército Popular (Colomer, entrevista con el autor).

<sup>60</sup> Mas Quiles, entrevista.

<sup>61</sup> Altier, entrevista.

<sup>62</sup> Gil Edo, entrevista con el autor.

distinto al tradicional»<sup>63</sup>. Otro alumno asegura que el IO fue realidad gracias a la presencia en el Gobierno republicano de un ministro de instrucción comunista que pretendía, además de extender la educación a los que antes carecieron de ella, contar en el futuro con «trabajadores productivos»<sup>64</sup>; una alumna cree que el IO pretendía formar «para ocupar sitios, que en la sociedad hay muchos sitios que ocupar donde imponer criterios, entonces eso lo teníamos bien claro, de que nos guiaban para eso [...] éramos el futuro»<sup>65</sup>. Se sabían parte del IO como miembros de un proyecto nuevo para España. Otro alumno dice que lo que los profesores les inculcaban era el compromiso con la República, que todos «teníamos que ser una piña» para sacar adelante a España como pueblo; que la gratuidad de los estudios y las indemnizaciones que recibían por estudiar, no tenían como finalidad conseguir un provecho personal sino poner su formación al servicio del pueblo<sup>66</sup>, devolverle «lo que se nos había entregado a nosotros»<sup>67</sup>. La cultura adquirida en el IO no fue considerada una propiedad individual sino un bien a compartir. Manuel Zamorano traduce esta idea socializadora al modo gramsciano con menos idealismo: asegura que en la inauguración del IOV se les explicó que cuando acabasen su formación pasarían a formar parte del Estado «sin que ninguno pudiera establecerse por su cuenta, o sea que íbamos a ser del Estado»<sup>68</sup>.

## 6. Los alumnos

Pero la única pertenencia que los alumnos se reconocen unánimemente es a la comunidad afectiva del IO. Este fue sentido como una familia, como un hogar: «de ahí que hubiera en todos como un deseo de unirse, de hermanarse, de compartirse; era auténtica vida en común, de verdad», enfatizaba un alumno<sup>69</sup>. El sentimiento de fraternidad y camaradería que todos evocan, es, quizá, el *leitmotiv* de su memoria como alumnos en 1986. También lo es en la memoria de 2003, pero aquí, una vez más, se observan diferentes matices. Si en la primera no hay diferencias entre internos y externos, salvo que estos dormían en el domicilio familiar<sup>70</sup>, en la segunda se señala que los externos no participaban en las importantes actividades formativas de los fines de semana, ni estaban

<sup>63</sup> Soriano, entrevista.

<sup>64</sup> Cuenta Mas Quiles (entrevista) que su pretensión de ser matemático no fue tan bien recibida como la de quienes querían ser ingenieros o arquitectos.

<sup>65</sup> Moscardó, entrevista.

<sup>66</sup> Gil Edo, entrevista.

<sup>67</sup> Soriano, entrevista.

<sup>68</sup> Zamorano, entrevista.

<sup>69</sup> García Bayarri, entrevista.

<sup>70</sup> Gil Edo, entrevista con el autor.

tan asociados al proyecto del IO como los internos, que «sí que se organizaron algo, pero (sic) como vivían en comunidad...pero yo no, yo iba y ¡hola, buenos días!, y ¡ala!, nada más»<sup>71</sup>. No fue este el único indicio diferenciador entre alumnos. En 1986 se reconoce la resistencia política a considerar como obreros a quienes no trabajaran en la industria o la agricultura – como prescribía el decreto creador – dificultando el acceso al IO a los que realizaran tareas distintas, como las administrativas<sup>72</sup>; en 2003 este hecho se personaliza, se interpreta y se acoge con cierta complacencia. Así, una alumna, empleada en un manicomio, confiesa sus problemas para acceder al IO al no ser considerada «suficientemente obrera» por suponerse que trabajaba de enfermera<sup>73</sup>. Haber percibido a los IO como un instrumento de lucha contra los privilegios de clase, indujo a algunos alumnos a comprender el veto a los trabajadores de «cuello blanco»; uno de ellos recuerda que en la primera promoción había muchos estudiantes de la FUE y que, luego, al tomar los sindicatos la iniciativa en el IO prepararon a su afiliados para ingresar en él<sup>74</sup>, llenándolo de obreros<sup>75</sup>; la tercera promoción – concluye – «fue genuinamente trabajadora» (Pic. 10)<sup>76</sup>.

Pero lo más novedoso es el reconocimiento en 2003 de la ruptura de la fraternidad entre los alumnos. En 1986 se recuerdan algunas de las causas que la provocaron: la presencia en la comunidad escolar de simpatizantes de la causa franquista, incluso la existencia de quintacolumnistas; la aparición de pintadas en los retretes a favor de Franco lo confirmó. La victoria franquista ratifica esa certeza manifestado abiertamente aquellas posiciones<sup>77</sup>; tras la guerra «muchas amistades fallaron porque se descubrieron cosas que allí [en

<sup>71</sup> Aparicio, entrevista.

<sup>72</sup> Sánchez Padilla, entrevista con el autor.

<sup>73</sup> García Extremeño, entrevista.

<sup>74</sup> La FUE organizó una academia de preparación para ingresar en el IO, lo que fue reprobado porque – en opinión de Mas Quiles (entrevista) – se quería ver la capacidad de los alumnos sin adiestramiento previo. Debió ser esta la razón, pues poco después se crea con el mismo fin el «Internado Durruti», de la CNT.

<sup>75</sup> Otro recuerdo – mencionado en 1986, aunque innominadamente – surge en este segundo tiempo de la memoria del IO: el papel del «Internado Durruti», donde la CNT preparaba a sus afiliados para el ingreso en el IOV, lo que hizo de manera exitosa pues en la segunda convocatoria consiguieron plaza cincuenta alumnos pertenecientes a las JJLL. Cabe preguntarse si en esta evocación influyó la investigación sobre esa institución de Cristina Escrivá, hija y sobrina de alumnos del IO, además de Coordinadora de la Asociación Cultural del IOV (C. Escrivá Moscardó, *El Internado Escuela Durruti*, Valencia, Ed. l'Eixample, 2011).

<sup>76</sup> Ramírez Izquierdo, entrevista.

<sup>77</sup> En el Archivo General de la Guerra Civil Española (Sección Político-Social, Madrid, 444/23, legajo 3591), consta una lista elaborada por un alumno del IO con ochenta nombres de alumnos del IO pertenecientes a las JSU a los que caracteriza como “elementos que integran el círculo de Estudiantes del Instituto Obrero”, a los que también añade su adscripción a la FUE y al SRI (C. Escrivá Moscardó, *1939, la desfeta de l'Institut per a Obrers de València*, in R.C. Torres, X. Navarro (edd.), *Temps de por al País Valencià (1938-1975). Estudis sobre la repressió franquista*, Castelló, Universitat Jaume I, 2012, p. 331).



Pic. 10. Una de las clases del IOV (Luís Vidal, 1937). Fuente: ACIO.

el IO] se ocultaban»<sup>78</sup>. Recuerda en 2003 un alumno que vio entonces a otro «vestido de falangista, al cual no le dije nada ni me dijo nada, teníamos miedo que después de eso... porque además Franco trató de buscarnos [...]»<sup>79</sup>. En esos años el miedo cortó la relación entre los alumnos: «Es que se tenía temor que se descubriese que habíamos estado en el Instituto Obrero porque había represalias y entonces pues se ocultaba esa cosa y la amistad se terminó»<sup>80</sup>. Rememora otra alumna que, en los años cincuenta coincide en una sastrería con un antiguo condiscípulo, «se me queda mirando y le digo, qué ¿no me conoces? [...] Pues no, no la conozco a usted; digo: pues tú has estado en el Instituto Obrero conmigo. Dice: no, no he estudiado en el Instituto Obrero. Con esto os lo digo todo, o sea, se acabó el Instituto»<sup>81</sup>. Sin duda, como arguye otro escolar al que tras la guerra civil le condenan a 17 años de cárcel, el carácter revolucionario del IO convirtió la pertenencia a él en algo peligroso<sup>82</sup>. Y la hermandad entre los alumnos se ocultó o se enterró.

El 28 de marzo, un día antes de que entraran en la ciudad las tropas de Franco, la alumna Asunción García<sup>83</sup> quema en la cocina del Instituto todo lo que pudiera comprometerles. Sólo se queda con las fotos que arranca de los carnets de estudiantes. Este testimonio lo corrobora Francisco Ramírez Izquierdo<sup>84</sup>

<sup>78</sup> Altier, entrevista.

<sup>79</sup> Zamorano, entrevista.

<sup>80</sup> Altier, entrevista.

<sup>81</sup> Pérez Reyes, entrevista.

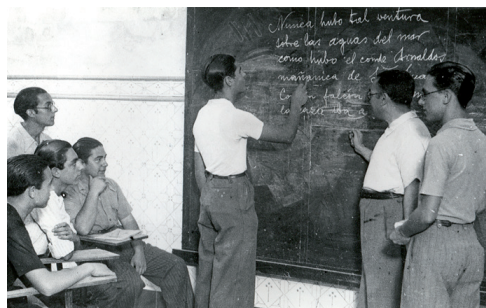
<sup>82</sup> Soriano, entrevista.

<sup>83</sup> García Extremeño, entrevista.

<sup>84</sup> Ramírez Izquierdo, entrevista.



Pic. 11. El profesor Rafael Penagos en una clase en el IOV (Luís Vidal, 1937) Fuente: ACIO.



Pic. 12. El profesor de Lengua y Literatura española, Samuel Gili Gaya (segundo por la derecha), en una clase del IOV. En la pizarra algunos versos del Romance del Conde Arnaldos (Luis Vidal, 1937). Fuente: ACIO.

quien recuerda haber ido al Instituto al acabar la guerra, encontrándose allí a otras compañeras; no olvida que una de ellas le dice: «tranquilo Ramírez – se daba cuenta de que yo iba desesperado – ya hemos quemado el fichero». Solo se quedaron con las fotos de los carnets que pegaron en una lámina a modo de improvisada orla. Fue el inicio de la separación.

## 7. Los profesores

De los contenidos de la memoria escolar del IO, uno de los más indelebles en la memoria de sus alumnos fue el de los profesores, con quienes aseguran haber constituido una familia. Para corroborarlo bastarla con reparar en los epítetos de «padres», «amigos», «camaradas», que les prodigan los alumnos. Compartir internado con algunos de ellos favoreció esta relación, para muchos inolvidable. Los alumnos destacan su valía y su apoliticismo en las clases, aspectos reconocidos tanto en 1986 como en 2003 (Pic. 11). En este último tiempo, sin embargo, la memoria de los alumnos recuerda de manera singularizada, informando que este profesor era de Acción Católica o de derechas y aquel comunista, que en unos era manifiesta una humanidad de la que otros carecían<sup>85</sup>, que algunos no eran tan buenos docentes<sup>86</sup> y que los había que no encajaban en el IO<sup>87</sup>.

<sup>85</sup> García Cidoncha, entrevista.

<sup>86</sup> García Extremeño, entrevista; Mas Quiles, entrevista.

<sup>87</sup> Monzón, entrevista.

Los expedientes de depuración de los profesores del IOV confirman muchas de las percepciones que los alumnos tienen de ellos y contradicen otras, aunque las informaciones contenidas en esta fuente documental, producidas en un contexto de represión, deben ser utilizadas con cautela. La mayoría de los profesores, que abrazaron una ideología y una actuación comprometida con la República, fueron sancionados – el 77 por 100 – siéndolo con la expulsión el 62 por 100<sup>88</sup>, porcentaje que multiplica al de sancionados en los Institutos de Secundaria. Otros fueron castigados simplemente por no profesar la religión católica. Pero también los hubo que manifiestan en sus pliegos de descargo actitudes que contrastan con la percepción que los escolares han transmitido de ellos, comportamientos que en unos casos se explican en una situación represiva, pero que, en otros, desmienten la imagen transmitida por los alumnos; sería el caso del profesor que manifiesta haber «practicado en Valencia el Socorro Blanco», haber servido a la *Quinta Columna* o haber denunciado a compañeros de claustro. Indudablemente, los profesores del IO como personas estuvieron sujetos a las grandezas y a las miserias de la condición humana, pero sin ellos el IO no hubiera sido lo que fue ni hubiera permanecido en el recuerdo de sus alumnos (Pic. 12).

### *Conclusión*

¿Existen dos tiempos en la memoria del IO? El análisis de las entrevistas de 1986 y de 2003-2004 permite detectarlos. En el primero – de «memoria idealizada» (1986) –, los alumnos recuerdan en base a la emoción de la experiencia personal vivida y conocida; este tiempo se correspondería con la recuperación de la memoria de lo ausente, de conquista de lo que, habiendo sido, no fue realidad “fáctica” hasta ese momento. En este tiempo el recuerdo surge emocionado, sin apenas contenido crítico. Guardadas durante años, se releen ahora las hojas amarillentas de los periódicos que hace medio siglo informaron sobre su experiencia. Importaba más sacar a la luz una realidad que, aunque lo fue en su momento, luego de silenciada no se convirtió en historia real hasta hace poco. La experiencia del IO se idealiza, se mitifica, se compara lo que a nivel social y educativo se alcanzó entonces (1936-1939) con lo que la realidad de 1986 ofrecía en esos dos mismos planos. Por otra parte, quizá tampoco era entonces el ánimo lo suficientemente atrevido para exhibir sin tapujos una experiencia hasta no hace mucho hostigada.

<sup>88</sup> M.C. Agulló Díaz, *La repressió franquista del professorat valencià, entre la memòria i l'oblit*, in Torres, Navarro (edd.), *Temps de por al País Valencià (1938-1975). Estudis sobre la repressió franquista*, cit., p. 281.



Pero pasan los años – diecisiete – y el IO alcanza protagonismo social y académico. Se le reconoce incluso en el callejero urbano dedicándole una calle. En esos años, los antiguos alumnos tienen numerosas ocasiones de sentirse incitados a mirar hacia atrás y de aprender nuevos recuerdos que incorporar a su memoria del IO. Es el tiempo de la «memoria estimulada y aprendida» (2003-2004). En él los sujetos han compartido recuerdos, han hecho lecturas ajenas sobre la experiencia compartida y se han apropiado informaciones que han terminado haciendo suyas. Esto, y la distancia con el primer tiempo, dotan a este segundo de un mayor realismo, desinhibición y actitud crítica en lo que respecta a la percepción de aquella experiencia común a la que también proporcionan una mejor contextualización. En él también se suministra mayor información que, en ocasiones, rectifica la dada en 1986 y siempre la enriquece. ¿Qué provoca este hecho?

Un nuevo régimen político, y el reconocimiento social y académico del IO de Valencia, rescataron del silencio aquella experiencia y preservaron su memoria. Pero, ¿de qué memoria hablamos? Indudablemente de memorias individuales, pero también de memoria colectiva. Las primeras se han ido conformando y nutriendo de la segunda, construida, a su vez, en base a los recuerdos de todos los escolares. Se confirmaría así la afirmación de Paul Ricoeur – «uno no recuerda solo, sino con ayuda de los recuerdos de otro. Además, nuestros presentes recuerdos muy a menudo se han tomado prestados de los relatos contados por otro»<sup>89</sup> – coincidiendo curiosamente en esto el filósofo francés con Maurice Halbwachs, el sociólogo<sup>90</sup>, quien sostuvo que los recuerdos que constituyen la memoria individual «siguen siendo colectivos, y son los demás quienes nos los recuerdan»; el olvido – dice el sociólogo- se produce por desvinculación del grupo, de tal manera que para reconstruir el recuerdo de algo compartido (en nuestro caso, la experiencia del IO), «para que nuestra memoria se ayude de la de los demás [...] hace falta que no haya dejado de coincidir con sus memorias y que haya bastantes puntos en común entre una y otras para que el recuerdo que nos traen pueda reconstruirse sobre una base común»; si el recuerdo «se ha anulado, si no podemos volver a encontrarlo, es porque hace ya mucho tiempo que no formamos parte del grupo en cuya memoria seguía vivo»<sup>91</sup>. Los alumnos del IO durante el tiempo -coincidente con la «larga noche de piedra» del franquismo – en el que permanecieron desagregados como «comunidad afectiva», empezaron a olvidar; y cuando volvieron a congregarse, las remembranzas rebrotaron y las memorias individuales de alguna manera se completaron. Un alumno, Gil Edo, confiesa cómo los recuerdos se le iban

<sup>89</sup> P. Ricoeur, *La lectura del tiempo pasado: memoria y olvido*, Madrid, UAM and Arrecife Producciones, 1999, p. 17.

<sup>90</sup> Destaco ambos sustantivos porque la filosofía se funda más en el individuo y la sociología en el grupo.

<sup>91</sup> M. Halbwachs, *La memoria colectiva*, Zaragoza, Prensas Universitarias de Zaragoza, 2004 pp. 25-26 y 34.

difuminando y cómo le fueron traídos de nuevo a la memoria gracias a las conversaciones con los compañeros: «Mi compañera Ofelia Moscardó me trajo a la memoria hace unos días las ocasiones en que el poeta Antonio Machado visitaba en el IO a Samuel Gili Gaya. Se trata de una efemérides que estaba desprendiéndose de mi anecdotario»<sup>92</sup>.

Tras el reencuentro, auspiciado en buena medida por la conmemoración del 50º aniversario de la creación del IO, los antiguos alumnos acudían todos los martes a la tertulia de la Sociedad Coral «El Micalet» donde hablaban de todo, pero donde también recordaban juntos su pasado de escolares en el IO, evocando, unos, el recuerdo debilitado o borrado en otros, y añadiendo en ocasiones recuerdos nuevos en quienes no los habían registrado antes como tales. Esto, tal vez, explicaría que informaciones transmitidas en 1986 por un solo alumno, luego, en 2003, las reproduzcan varios; esto sucedió, por ejemplo, con el referido donativo de las gabardinas del ejército ruso. La posibilidad de que las reuniones y tertulias semanales mantenidas por antiguos alumnos pudiera haber contribuido a crear una memoria colectiva, nos la confirman opiniones como ésta extraída de la entrevista a una alumna; preguntada por una cuestión concreta – el papel del entrevistador/a es también importante en el tiempo de la memoria estimulada y aprendida –, responde: «Esto me lo dicen a mí en el Micalet [lugar de las tertulias semanales]»<sup>93</sup>. Mas Quiles transmite en su entrevista un recuerdo que ya había desaparecido de su memoria; lo hace gracias a una condiscípula, Luisa Altier, quien, en esa referida tertulia, le entregó la foto que arrancó de su carnet de estudiante antes de prender fuego al archivo potencialmente comprometedor en el futuro, un hecho que Mas Quiles había olvidado a pesar de su prodigiosa memoria<sup>94</sup>.

Pero ese recuerdo entre iguales no se produjo de manera espontánea. Tras la efemérides del 50º aniversario de la creación del IOV, sus antiguos alumnos se vieron inmersos en un alud de conmemoraciones de las que eran protagonistas. Las aulas universitarias acogieron sus testimonios, se publicaron libros y artículos, la prensa se hizo eco de esa experiencia, se pronunciaron conferencias y se organizaron Jornadas de estudio sobre ella, se creó el *Boletín del IO*, felizmente se recuperó un documental producido por Film Popular en 1937 en las instalaciones del IOV y se localizaron fondos fotográficos en la Biblioteca Nacional (los mencionados de Walter Reuter y Luis Vidal) que dieron lugar a exposiciones que circularon por varias ciudades, se creó la «Asociación Cultural del Instituto Obrero de Valencia», se incluyó al IO en la *Guía Urbana de Valencia* de aquellos años y los itinerarios pedagógicos republicanos contemplan una parada en el edificio que lo albergó, se realizó un nuevo documental sobre esa experiencia pedagógica. Los alumnos absorbían lo

<sup>92</sup> J. Gil Edo, entrevista con el autor.

<sup>93</sup> Altier, entrevista.

<sup>94</sup> Mas Quiles, entrevista.

escrito y lo dicho en esos actos, incorporando a su memoria, probablemente, muchas informaciones ajenas, algunas de las cuales se dieron también en las tertulias del Micalet a las que ocasionalmente acudían estudiosos del Instituto.

Pero nada de esto es sorprendente, pues no en vano – dice Ricoeur – uno de los aspectos principales de la memoria «quizá consista en que nuestros recuerdos se encuentran inscritos en relatos colectivos que, a su vez, son reforzados mediante conmemoraciones y celebraciones públicas de los acontecimientos destacados de los que dependió el curso de la historia de los grupos a los que pertenecemos»<sup>95</sup>. Ciertamente, el pasado que compartimos con otros, nos constituye narrativamente.

En cierto modo, las circunstancias señaladas han reconfigurado la memoria idealizada del grupo de alumnos del IO. Nuestro análisis nos lleva a afirmar que las memorias individuales son deudoras de otras memorias también individuales que han adoptado el punto de vista del grupo, es decir, de la memoria colectiva. Como historiador, no respondería afirmativamente a quien preguntara si el segundo tiempo de la memoria – esa que hemos llamado «estimulada y aprendida» – es más útil en el taller de la historia. Tampoco lo haría respecto a la memoria del primer tiempo, el de la «memoria idealizada». La «memoria aprendida» porque en ocasiones ha mostrado haber hecho aprendizajes cuestionables – quizá de manera no consciente – para, quizá también inconscientemente, engrandecer la memoria del IO, convertido en mito. La «memoria idealizada» porque carece de algo que sí tiene la otra: riqueza memorialista y mejor contextualización, como efecto de haberse desprendido en buena parte del idealismo que lastra a la primera.

¿Quiere esto decir que la memoria colectiva tiene para el historiador más valor que las memorias individuales? A este respecto comparto la convicción de Ricoeur de que la atribución del recuerdo «à toutes les personnes grammaticales: moi, elle/lui, nous, eux, etc.», autoriza al historiador a recurrir sin escrúpulo alguno a la memoria individual y a la memoria colectiva ambas a menudo entrelazada<sup>96</sup>. Si evocar experiencias compartidas no da lugar a la reescritura de la historia, sí lo da a su reinterpretación. Por eso no creo que se pueda sostener que los antiguos alumnos hayan reescrito la historia del IO en el segundo tiempo de su memoria mayormente nutrida de la memoria común; la historia del IO no conoce modificaciones sustanciales en este segundo tiempo. Quien la leyera construida en base a las entrevistas de 2003, la reconocería también en otra cimentada sobre las informaciones de 1986. Pero para obtener una información más precisa y completa, debería someter ambos tiempos a la verificación crítica de la historia.

A la vista de estos dos tiempos descritos en la memoria del IO, ¿qué papel juega la memoria en la hechura de la historia? Sabemos que la primera presenta

<sup>95</sup> Ricoeur, *La lectura del tiempo pasado*, cit., p. 17.

<sup>96</sup> Id., *L'écriture de l'histoire et la représentation du passé*, cit., pp. 734-735.

serios problemas a la segunda; pero como decía Walter Benjamin, solo la memoria puede hacer algo de importancia capital: abrir expedientes que la historia ha dado por cerrados. La memoria sirve como acicate para la historia, para manifestar – como dijimos – lo que no pudo llegar a buen término pero que fue, y para que su realidad, aunque no fáctica en el sentido hegeliano – solo es real lo que ha llegado a ser y no lo silenciado – merezca ser atendida, estudiada y convertida en «memoria archivada»: «Gracias a la memoria – dice Reyes Mate – lo conocido se hace presente como pregunta, como búsqueda. La memoria es una huella que deja lo conocido para que sea ahondado y transformado en un conocimiento fundado»<sup>97</sup>. En este sentido, los recuerdos de los alumnos del IO son como la declaración de nuevos testigos que, una vez hecha, tras manifestarlos, dejan de ser testimonios y se convierten en huellas documentales, en documentos, en una especie de «unidad de medida del conocimiento histórico»<sup>98</sup>. Pero el documento no se da, sino que se constituye con el propósito de encontrar información sobre el pasado, documento que en el caso que nos ocupa, como en todos, ha de ser sometido al escalpelo de la crítica histórica.

<sup>97</sup> R. Mate, *Memoria y construcción de la identidad colectiva*, in J.M. Marina, J.M. González García (edd.), *Memoria y futuro. Construcción del vínculo político*, Madrid, Biblioteca Nueva, 2015, p. 113.

<sup>98</sup> Ricoeur, *L'écriture de l'histoire et la représentation du passé*, cit., p. 738.

# Seduction and Sediton of the “Table” in the History of Children’s Literature

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**ABSTRACT:** Sitting, eating, talking around a table: these actions have been performed by men and women of different times, places and traditions. The table as a research object can be included in some recent developments of the history of education, of the history of children’s literature and in some literary studies dedicated to this *topos*. Tables are constantly and regularly present in children’s literature and appear both in verbal and visual narratives of domestic life. In this study, we investigate the association between the physical dimension of the table (shape, dimension and different materials) and its vast symbolic and narrative potential. This “new” narrating object is considered as a significant indicator for the critical analysis of the changing representation of children’s life and family relationships in children’s literature.

**EET/TEE KEYWORDS:** Space and Place in Children’s Literature; Narrating Objects; Home and domestic landscapes; History of Children’s Literature; Critical Approaches to Children’s Literature.

## *Introduction*

The table is the place where stories are woven: a typical metaphor of conviviality and, in a more contemporary dimension, of family gatherings. During the course of human history, this everyday object has represented a place of dialogue and of care for the extra-ordinary. Our table is generally the place where we lay the food and drinks that nourish our beloved ones and quench their thirst. Around real or virtual tables, human beings have traditionally shared the words that have satisfied their need for stories, knowledge, and feelings. An intimate parallelism exists between the fact of being hungry for food and the idea of being hungry for words. The words we hear while we

are sitting at the table bring nourishment to our imagination, to our narrative thinking, to our life. In literature, too, the representation of shared food and drink is a way to express belonging and identity. It is a way of cultivating conviviality and communication or, and here comes the specificity of children's literature, to initiate the revelations, changings and revolutions that determined many coming-of-age stories. The actions performed while sitting at the table, described in the history of children's literature, inform us of things and events that have much to tell about children. They contain irrefutable traces of the intensity of children's life, of the relationship between childhood and its own development, of the relationship with adults, of children's images and education<sup>1</sup>.

1. *Anthropological, historical and educational significance of a "new" research object*

Sitting, eating, talking around a table: these actions have been performed by men and women of different times, places, habits and traditions. All living beings need to take their nourishment, but in humans this primitive impulse is transformed into an act of intelligence, because it takes place around a table, together with other mouths and minds<sup>2</sup>.

Scholars dealing with narrativity, education, literature and children's literature have been paying special attention to some recent ethno-historiographical studies by the American anthropologist Polly Wiessner. These studies show how, after thousands of years, the typically human need of creating narrative microcosms by the firelight has remained practically unchanged. In the «Proceedings of the National Academy of Sciences of the United States of America»<sup>3</sup>, Wiessner translates, analyses and compares 174 day and night-time conversations among the *Ju'hoan* bushmen, a southern African hunter-gatherer community that inhabits northeast Namibia and northwest Botswana. This study shows the fundamental role played by fire not only as far as the satisfaction of our ancestors' basic needs is concerned – such as the protection against predators and nourishment (cooking has contributed to the development of the human body) – but also with reference to the topic of our present discussion. Around 400,000 years ago, the control of fire and its regular use contributed to expand

<sup>1</sup> M. Bernardi, *Letteratura per l'infanzia e alterità. Incanti, disincanti, ambiguità, tracce*, Milano, FrancoAngeli, 2016, p. 89.

<sup>2</sup> A. Gopnik, *In principio era la tavola*, Milano, Guanda, 2012, p. 15.

<sup>3</sup> P. Wiessner, *The Embers of Society: Firelight Talk Among the Ju'hoansi Bushmen*, «Proceedings of the National Academy of Sciences of the United States of America», vol. 111, n. 39, September, 30<sup>th</sup> 2014, pp. 14027-14035, <<http://www.pnas.org/content/111/39/14027.full>> (last accessed: August 21<sup>th</sup>, 2016).

the amount of free time available for social interaction. This coincided with, or slightly anticipated, the acquisition of some fundamental human capacities such as language, the elaboration of religious faiths, the transmission of knowledge and cultural values. Fire offered new time and space for activities that reached beyond everyday needs and worries and that gave a fundamental contribution to human development. These activities most likely took place in the evening, around the fire.

Which were the activities that played such an important role on the evolution of our species? Singing, dancing, religious ceremonies and a fundamental practice typical of conviviality: storytelling. By night, around the fire, far from daytime worries and anxieties, the *Ju'hoansi* bushmen tell stories about people who are absent or belong to wider social networks. They weave stories that help them clear up daytime quarrels, stories about spirits and about how they can influence the human world. Firelight stories originally allowed human beings to make a wider use of their imagination, to improve their narrative skills, to strengthen their comprehension of other people's thought and emotions, to create, regulate and transmit habits, values and cultural institutions<sup>4</sup>. Firelight stories strengthened human relationships inside and outside single social groups. As Wiessner points out, the appetite for firelit settings for intimate social conversations (i.e. by the fireplace or in candle lit rooms) still remains with us today. This is a potentially fruitful research area<sup>5</sup>.

In the present study, we hypothesize that the narrative power of fire can be reproduced even in our technological and hyper-illuminated houses: and precisely around the table, the ultimate hearth of family life. This continuity in the presence of the table provides a significant indication, in order to read and interpret the representations and transformations of daily life in children's literature. Among the numerous examples that can be mentioned in this sense there are the *Children's and Household Tales* by the Grimm brothers or the different children's picturebooks showing the illustration of a table, often together with a fireplace, a lamp or a candle: all metaphors of warmth, care and affection.

Pictures showing a table are obviously precious research objects also from the pedagogical and educational point of view. The table is a rescue board, which has always sustained people across the river of existence, especially through the most difficult situations. Around the table, it is possible to satisfy the primary need for socialization. In order to do this, it is essential to develop language competences, as Marianne Wolf's study *Proust and the Squid. The Story and Science of the Reading Brain*<sup>6</sup> clearly explains:

<sup>4</sup> *Ibid.*, p. 14027.

<sup>5</sup> *Ibid.*, p. 14033.

<sup>6</sup> M. Wolf, *Proust and the Squid. The Story and Science of the Reading Brain*, Cambridge, Icon Books Ltd., 2008.

by five years of age, some children from impoverished-language environments have heard 32 million fewer words spoken to them than the average middle-class child. [...] Nothing about language development has isolated effects on children. [...] In a broad study of early development of literacy skills, [...] one of the major contributors to later reading was simply the amount of time for ‘talk around dinner’. The importance of simply being talked to, read to, and listened to is what much of early language development is about, but the reality in many families (some economically disadvantaged, some not) means that too little time will be given to even these three basic elements before a child reaches the age of five. [...] All professionals who deal with children can help to ensure that parents understand the contribution they can make to their child’s potential<sup>7</sup>.

Talk around dinner is a powerful antidote against verbal poverty, but, above all, it prevents two other forms of deprivation, which are deeply connected with each other: cognitive and affective poverty. As Wolf observes, «it is not simply a matter of the number of words unheard and unlearned. When words are not heard, concepts are not learned. When syntactic forms are never encountered, there is less knowledge about the relationship of events in a story»<sup>8</sup>. More simply: who has never heard the words that are needed in order to talk about the internal and the external dimension of life, will find it difficult to understand these words. The same applies to feelings: if they are not the object of daily experience, both the child and the future adult will hardly be able to understand other people’s feelings<sup>9</sup>. Recent developments in the neuroscience field have proved that the human capacity of perceiving other people’s intention to move, action or emotion, is not only based on cognitive strategies, but also on simulation mechanisms connected with mirror neurons. Human beings are able to identify with other people and enter the world of other people’s experience. They are able to share feelings because, through a mirroring mechanism, they can recognize their meaning «from the inside». The table is an ideal place for dialogue, listening, emotional and affective growth. The following step is the ability to think and, as one grows up, listen to others, learn concepts, infer, foresee and interact with others. In our «fast speed» society, where communication is often extremely quick (Twitter, Instagram, etc.), spending time around a table is a revolutionary *act*. The time we dedicate to our table (care and preparation, expectations and hospitality, quantity and quality of words) is a basic foundation of educational continuity in the family. The greatest, most important and most fruitful educational rule is not to take time, but to spend time: this is Jean-Jacques Rousseau’s teaching. The table represents a crucial element of an environment where it is possible to follow this rule.

The table as a multi-material, multi-form and multi-functional research object can be included in some recent developments of the history of education and of the history of children’s literature.

<sup>7</sup> *Ibid.*, pp. 102-104.

<sup>8</sup> *Ibid.*, p. 102.

<sup>9</sup> *Ibid.*



Starting from Philippe Ariès' theories in the Sixties, the history of childhood has gradually started being identified with the history of educational places and objects that inhabit children's lives: family, school, notebooks, diaries, clothes, toys, furniture, accessories, etc. In the past twenty years, historiography has intercepted and integrated various thematic studies connected with childhood. It has variously dealt with models, representations and educational practices<sup>10</sup>, educational places and domestic landscapes<sup>11</sup>, educational materials and children's objects<sup>12</sup>. The scholar Monica Ferrari, in particular, has dedicated careful and detailed studies to the significance and use of educational materials and daily life objects in the history of education. In these studies, she underlines the importance of investigating «the teachings of things»<sup>13</sup> and explains the fundamental importance, in formal and informal educational situations of the past and of the present, of such educational tools as, for instance, mirrors, pages, things in general<sup>14</sup>.

This renewed attention towards places and objects is also present in various studies about the history of children's literature. Interior landscapes and geographies have become the object of numerous in-depth studies both in the

<sup>10</sup> See E. Becchi, D. Julia (edd.), *Storia dell'infanzia*, 2 voll., Roma-Bari, Laterza, 1996; C. Covato, S. Olivieri (edd.), *Itinerari nella storia dell'infanzia. Bambine e bambini, modelli pedagogici e stili educativi*, Milano, Unicopli, 2001; F. Cambi, S. Olivieri (edd.), *Modernizzazione e pedagogia in Italia. Il Novecento. Cultura, istituzioni, pratiche educative*, Milano, Unicopli, 2008; E. Becchi, M. Ferrari (edd.), *Formare alle professioni. Sacerdoti, principi, educatori*, Milano, FrancoAngeli, 2009.

<sup>11</sup> See C. Covato, *Casa, dolce casa: il privato nella storia dell'educazione*, in Ead., *Memorie discordanti: identità e differenze nella storia dell'educazione*, Milano, Unicopli, 2007, pp. 21-44; M. Perrot, *Storia delle camere*, Palermo, Sellerio, 2011; C. Covato (ed.), *Per una storia dei luoghi della materialità educativa*, «RSE Rivista di Storia dell'Educazione», vol. 1, n. 1, 2014, pp. 5-116; E. Becchi, *Dalla nursery alla stanza del figlio*, *ibid.*, pp. 19-29; F. Borruso, *Interni domestici di famiglie borghesi nella drammaturgia europea fra Otto e Novecento*, *ibid.*, pp. 45-53; M. Morandi, *Gli spazi della scuola secondaria in Italia: tracce per una storia*, *ibid.*, pp. 55-62.

<sup>12</sup> See M. Ferrari, *La paideia del sovrano. Ideologie, strategie e materialità nell'educazione principesca del Seicento*, Firenze, La Nuova Italia, 1996; Ead., *Lo specchio, la pagina, le cose. Congegni pedagogici tra ieri e oggi*, Milano, FrancoAngeli, 2011; M. Ferrari, M. Morandi, E. Platé, *La lezione delle cose. Oggetti didattici delle scuole dell'infanzia mantovane tra Ottocento e Novecento*, Mantova, Comune di Mantova, Publipaolini, 2008; 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 & Pensiero, 2005; J. Meda, *Quaderni di scuola. Nuove fonti per una storia dell'editoria minore*, «Annali di storia dell'educazione e delle istituzioni», n. 13, 2006, pp. 73-98; 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 the 20<sup>th</sup> Centuries*, Macerata-Firenze, Edizioni Polistampa, 2010; G. Genovesi (ed.), *Il quaderno umile segno di scuola*, Milano, FrancoAngeli, 2008; F. De Giorgi, *Appunti sulla storia del banco scolastico*, in Covato (ed.), *Per una storia dei luoghi della materialità educativa*, cit., pp. 85-98.

<sup>13</sup> M. Ferrari, *Il bambino e il suo ambiente: cose dei bambini e cose per i bambini nel dibattito storiografico*, «Studi sulla formazione», vol. 13, n. 1, 2010, p. 41.

<sup>14</sup> Ferrari, *Lo specchio, la pagina, le cose. Congegni pedagogici tra ieri e oggi*, cit.

Italian<sup>15</sup> and in the international<sup>16</sup> context after 1995, a fundamental date for the theoretical and methodological development of the discipline<sup>17</sup>. The ground breaking research on domestic environments in children's literature, carried out by the Bolognese scholar Emy Beseghi (1995), is still a fundamental reference point for recent studies in the field, to the extent that the so-called «interior geography»<sup>18</sup> has now become a universally accepted hypothesis. Houses, walls, things and objects are pervaded by an extraordinary narrative power, which is «capable of penetrating the unexplored privacy of the family» and to «capture new insights on childhood, through the most significant representations of the domestic environment»<sup>19</sup>. Beside substantially contributing to narrative plots, home environments also imply strong symbolic references. They offer different narrative settings: from places of protection, love and care, they can become disquieting places of observation, deprivation, exclusion, deceptiveness and extreme rebellion. Like houses themselves, their interiors (bedrooms, kitchens, living rooms, attics, cellars, gardens, etc.) and the objects they contain (doors, windows, tables, chairs, cupboards, book shelves, beds, wardrobes, toys, etc.) can acquire narrative force and offer different possible interpretation keys «and precious information about reality, since they contain historical and geographical references, status symbols, indications about generations, epochs

<sup>15</sup> See E. Beseghi, *Interiors. Case che parlano, stanze che sussurrano*, «L'isola misteriosa. Quaderni di letteratura per l'infanzia diretti da Emy Beseghi», n. 1, Milano, Mondadori, 1995, pp. 57-74; F. Cambi, *La casa: luogo-chiave della fiaba? Rileggendo le "Fiabe" dei Grimm*, in F. Cambi, G. Rossi, *Paesaggi della fiaba: luoghi, scenari, percorsi*, Roma, Armando, 2006, pp. 60-66; L. Cantatore (ed.), *Ottocento fra casa e scuola: luoghi, oggetti, scene della letteratura per l'infanzia*, Milano, Unicopli, 2013; Id., *Il grembo materno, la nursery, e il sofà della mamma. Una lettura di Incompro di Florence Montgomery*, in Covato (ed.), *Per una storia dei luoghi della materialità educativa*, cit., pp. 31-43; Id., *PARVA SED APTA MIHI. Studi sul paesaggio domestico nella letteratura per l'infanzia del XIX secolo*, Pisa, ETS, 2015; W. Grandi, *Sottosuolo. I viaggi all'interno della terra nelle narrazioni per ragazzi tra rappresentazioni fantastiche, immagini scientifiche e metafore di crescita*, in Covato (ed.), *Per una storia dei luoghi della materialità educativa*, cit., pp. 109-116.

<sup>16</sup> See M. Reimer (ed.), *Home Words: Discourses of Children's Literature in Canada*, Waterloo, Ont., Wilfrid Laurier University Press, 2008; M. Reimer, *The Child of Nature and the Home Child*, «Jeunesse: Young People, Texts, Cultures», vol. 5, n. 2, 2013, pp. 1-16; M. Reimer, «No place like home»: *the facts and figures of homelessness in contemporary texts for young people*, «BLFT – Nordic Journal of ChildLit Aesthetics», n. 4, 2013, <<http://www.childlitaesthetics.net/index.php/blft/article/view/20605>> (last accessed: August, 21<sup>th</sup>, 2016); M. Reimer, *On Location: The Home and the Street in Recent Films About Street Children*, «International Research in Children's Literature», vol. 5, n. 1, 2012, pp. 1-21; M. Sachiko Cecire, H. Field, K. Mudan Finn, M. Roy (edd.), *Space and Place in Children's Literature, 1789 to the Present*, Farnham, Ashgate, 2015.

<sup>17</sup> A. Ascenzi, *La letteratura per l'infanzia in prospettiva storica tra vecchi e nuovi "pregiudizi"*, in M. Bernardi, E. Beseghi (edd.), *Letteratura per l'infanzia: complessità, intrecci, interdisciplinarietà, direzioni di ricerca*, «RSE Rivista di Storia dell'Educazione», vol. 2, n. 2, 2015, p. 15.

<sup>18</sup> Beseghi, *Interiors. Case che parlano, stanze che sussurrano*, cit., p. 58 [Translation mine].

<sup>19</sup> *Ibid.* [Translation mine].

or family transformations»<sup>20</sup>. The present analysis starts from this historical and theoretical reference framework.

## 2. *Table and literature: connections*

Already in ancient Greece, the table laid out for a banquet represented an important opportunity for socialization, display of social status, celebration of the most significant events of human life. It is not by chance that the title of fundamental masterpieces such as Plato's *Symposium* or Dante's *Convivio* is dedicated to the convivial setting.

In medieval chivalric poetry, in particular, the table becomes a protagonist, raising up from a place of social aggregation to a symbol of spiritual and moral value<sup>21</sup>. When king Arthur, the legendary Breton sovereign, summoned the Grail Knights at his court, they sat together at the Round table: a table which, in its circular shape, expressed the perfectly equal status of all the guests who were sitting around it. The image of this table, typical of the unique heroic chivalric institution, became a largely popular and powerful symbol. Through centuries of European literature, it acquired complex meanings, which constantly kept re-emerging in the most different situations.

The table plays a significant role in many masterpieces through the history of literature. One work in particular, however, deals with this *topos* in an unprecedented way, employing it in the narrative plot and elevating it to a fundamental metaphor of human encounters. This work is Giovanni Boccaccio's *Decameron*, a capital masterpiece of western culture, which has influenced and inspired not only literature, but also, in more recent times, theatre and cinema, thanks to its strong convergence between narration and figurative interpretation<sup>22</sup>. This codex is characterized by the strong subjectivity and symbolic value of some «narrating objects», such as the heart, the cup, the ring, the bed and, above all, the table. Some critical studies dedicated to this *topos* turn out to be particularly interesting for children's literature as well. Laura Sanguineti White, an Italian Studies professor at the Rutgers School of Arts and Sciences (New

<sup>20</sup> *Ibid.*, p. 71 [Translation mine].

<sup>21</sup> J. Chevalier, A. Gheerbrant, *Dizionario dei simboli*, Milano, Bur, 2011.

<sup>22</sup> Boccaccio himself decided to narrate his *Decameron* in words and pictures in the autograph manuscript of his masterpiece. The first illustrated codex is a holograph of the *Decameron* (Berlin: Staatsbibliothek Preussischer Kulturbesitz, Hamilton 90, around 1370), which is only decorated with half busts of the main characters drawn by Boccaccio himself in the margins of the text. See R. Fabiani Giannetto, *Medici Gardens. From Making to Design*, Philadelphia, University of Pennsylvania Press, 2008, p. 250. Boccaccio's incredible narrative ability is so powerful and fascinating that it was the source of inspiration for the artistic creations of such masters as Sandro Botticelli, Vittore Carpaccio, Titian, Peter Paul Rubens, Marc Chagall and Salvador Dalí.

Jersey, USA) dedicated a long and in-depth exploration to the importance, the functions and the symbolism of the table<sup>23</sup> and of food<sup>24</sup> in Boccaccio's work. Sanguineti White's research shows how the Tuscan writer was able to represent the universality of human life starting from everyday objects and events connected with the table. In particular, in her essay *La scena conviviale e la sua funzione nel mondo del Boccaccio* [The convivial setting and its function in Boccaccio's world]<sup>25</sup>, Sanguineti White analyses the *topos* of the feasting party and underlines the tight narrative connection between human encounters and the environment where they take place. The denotative function of the *Decameron* setting plays a secondary role: houses, for example, described in all their components (bedrooms, kitchens, living rooms, windows, doors, courtyards, private gardens, orchards) do not fulfil the traditional narrative function of places dedicated to residence and retreat. They rather become places of friendly or erotic extra-marital encounters<sup>26</sup>. The different places are narratively selected and declined according to their specific degree of «social life» and «suitability for human association»<sup>27</sup>. Boccaccio considers the conviviality of tables as the appropriate setting for the development of his human plots. The table is the ultimate and most important aggregating institution of all. Its basic function is fulfilled in human encounters and in the typically human enjoyment of verbal communication. The convivial settings represent the narrative initiation and conclusion of human events. They are therefore the emblematic institutions of a special life vision<sup>28</sup>. For this reason, their systematic appearance, with different functions and meanings, may represent the ideal setting for an extraordinary epiphany (passing from death to life or between different identities), for formal peace-making, for the reunion of a disrupted family, for the celebration of new-found harmony and joy, for a love declaration or a magnanimous action. According to Sanguineti White, the convivial setting may also acquire negative connotations, and become the setting of divisions and events that determine the end of social or private bonds, or a place of punishment. The events that take place around the table may even become the ideal context where social transformations are announced, or where the sociological and cultural changes of a constantly evolving society take place. This is the critical approach suggested for the interpretation of some works of children's literature through the literary *topos* of the table.

<sup>23</sup> L. Sanguineti White, *La scena conviviale e la sua funzione nel mondo del Boccaccio*, Firenze, Olschki, 1992.

<sup>24</sup> Ead., *Seduzione e privazione. Il cibo nel Decameron*, Lucca, Maria Pacini Fazzi editore, 2016.

<sup>25</sup> Ead., *La scena conviviale e la sua funzione nel mondo del Boccaccio*, cit.

<sup>26</sup> *Ibid.*, pp. 9-10.

<sup>27</sup> *Ibid.*, p. 10. [Translation mine].

<sup>28</sup> *Ibid.*, pp. 10-11.

### 3. *The table: a "narrating object" in children's literature*

Scholars dealing with children's books – both verbal narrations (fantasy novels, dystopian fiction, biographies, historical novels, realistic novels, short stories, etc.) and visual narrations (picturebooks, comics and graphic novels) – are certainly familiar with the constant and regular presence of tables. The observation of how tables are described in these works is certainly a fruitful exercise because, among other things, it offers the opportunity to compare and create comparative models. The table is in fact a «narrating object» that may be interpreted both through its materiality and its symbolic meanings.

The table represents a tale of hunger and of how men have tried to transform it into an opportunity for pleasure<sup>29</sup>. As discussed above, on the table there is food for the body and the stories told around the table are food for the heart. In the history of children's literature, fairy-tales offer significant examples of how a lavishly decked table represents a promise for prosperity, love and happiness. Bad omen and dangers loom as soon as the table becomes poor, empty or dirty. Fairy-tale heroes or heroines escape from an initial situation of deprivation, abandonment or tribulation, and set off on a journey in search of happiness: they cross dark and dangerous woods and forests, climb down deep wells and up high trees, cross menacing rivers and seas. By facing the difficult trials of these hostile environments, they always manage to fulfil their task, go back home and live happily ever after. Tales originally aim at amazing their listeners. They offer their protagonists – human creatures who live with supernatural beings (fairies, witches, ogres, gnomes, magic dragons and so on) – the opportunity of performing improbable and incredible actions, which become possible only in fantastic territories<sup>30</sup>. Despite the encounter with alien worlds, despite the twists and turns of the most different situations, however, all tales inevitably find their ending in a perfectly domestic environment. Much like in Sanguineti White's analysis of the *Decameron* tales, in many classical tales, too, adventures start and order is re-established around a table.

*Pinocchio's* destiny is indissolubly connected with tables, which represent a constant and pervasive presence in the whole history of the famous marionette. Many of his most important adventures take place at the table. *Pinocchio's* conception is connected with Geppetto's broken table. The lavishly decked table at the Red Prawn Inn, and the fabulous dinner with the Fox and the Cat, are followed by *Pinocchio's* chase and hanging. A table with two hundred

<sup>29</sup> M. Montanari, *I racconti della tavola*, Roma-Bari, Laterza, 2014.

<sup>30</sup> See D. Richter, *La luce azzurra. Saggi sulla fiaba*, Milano, Mondadori, 1995; M. Bernardi, *Infanzia e fiaba*, Bologna, Bonomia University Press, 2007; M. Campagnaro, *Lo scudo di Perseo. Fiabe illustrate e metafora*, in Ead. (ed.), *Le terre della fantasia. Leggere la letteratura per l'infanzia e l'adolescenza*, Roma, Donzelli, 2014, pp. 39-72; S. Barsotti, *L'utile inutilità della fiaba*, in Bernardi, Beseghi (edd.), *Letteratura per l'infanzia: complessità, intrecci, interdisciplinarietà, direzioni di ricerca*, cit., pp. 75-84.

cups of coffee-and-milk and four hundred slices of toast buttered on both sides is the Fairy's promise for a (missed) party, destined to celebrate Pinocchio's transformation into a real boy. A little table spread out and illuminated by a candle is the setting of Pinocchio's re-union with his father Geppetto in the body of the Dog-Fish. Pinocchio has a «predestined» relationship with tables, and he often goes back to them. Tables are fundamental elements of his adventures, not only because they are made of wood, like the marionette itself, but also because they offer him the opportunity to satisfy his primordial appetite. Pinocchio's hunger is the hunger of poor people: true, terrible hunger, which causes a situation of anxiety and psychological isolation. At the same time, it is also a symbolic hunger: a need and desire for something<sup>31</sup>.

Tables appear in different representations and with different symbolisms in children's picturebooks and illustrated books, too. In general, they tend to have a rectangular shape. Circular tables, on the other hand, are quite rare: they generally express some form of intimate dialogue within oneself or with others, a dialogue on equal terms, without limits and hierarchies. These tables represent the uniqueness of certain encounters, the experience of sincere and loyal conversations, enriched by special affective nuances and by a profound sense of complicity. They refer to high quality human relationships, based on equal roles: extraordinary love stories, sincere and affectionate friendships, strong and exclusive family relationships.

The tea party in *Alice in Wonderland* offers the ceremonial setting for some of the most famous rectangular tables ever illustrated in children's books. It is not the case here, but sitting at the head of the table often means occupying a strategic position, which highlights different power roles and sentimental connections in the family. The position of the characters sitting at the table clearly shows the quality of their relationship, the relative freedom of speech and action, the warmth of human relationships within the domestic walls. The most successful illustrations do not only show family stories, but they also evoke thoughts about the historical, cultural, economic and social events that form the background of the protagonists' adventures.

One example is particularly interesting, as far as the different concepts and symbols mentioned above are concerned: the table contained in Federico Maggioni's illustrated version of *The Betrothed*<sup>32</sup>. The picture shows two characters on a purple-black background, and offers a modern re-interpretation of some typical elements of 17<sup>th</sup> century painting. The two characters are sitting behind a big table set with a red cloth, decorated in Matisse-style arabesques, and a sumptuous pedestal fruit bowl: a huge, monstrous being with a solemn

<sup>31</sup> F. Cambi, *Collodi, De Amicis, Rodari: tre immagini d'infanzia*, Bari, Dedalo Edizioni, 1985, p. 54.

<sup>32</sup> A. Manzoni, F. Maggioni, *I promessi sposi nei disegni di Federico Maggioni*, Casale Monferrato, Piemme, 2006.

outfit, reminiscent of the Minotaur, and a spooky little creature. Their faces are of different colours, red and white, but their big white collars are a clear sign of their affinity. These two figures have no physical contact with the table and with each other, they do not look at each other, there is no relationship between them, apart from the rigid representation of their common aristocratic lineage: a lonely open pomegranate, which lies broken at the foot of the pedestal bowl. This fruit represents nobility but, at the same time, it is a symbol of the tempting and evil sweetness of the girl's destiny.

The two characters are Gertrude, the Nun of Monza, and her father. The sad destiny of this woman is part of a popular story: the arrogant "prince-father", heir to the fortune of one of the richest families in Monza, condemns his daughter to monastic life. Gertrude is the victim of her father's exhausting and pathetic subjugation, a relationship made of violence, extortion, lies, and adulations. Gertrude is too fragile and weak to rebel against her father's authority. She is different from Cosimo, Matilda and Thomas, three characters we will analyse in the following part of the present discussion. Gertrude is unable to resist her father's non affective oppression. Her reverence and childish desire to please him are much too strong. Her father will not hesitate to sacrifice her in order to preserve the family property, and she will surrender to his decision. Her tragic destiny is inscribed in Maggioni's table: cold and devoid of any human warmth. Deprived of any value and affection, Gertrude inevitably surrenders to a life of damnation. No rescue board is available for her to hang on to and escape her terrible shipwreck.

Rather than fairy tales, *Pinocchio* or the *Betrothed*, we are now going to concentrate our attention on a small selection of recent children's books. These stories are not intended as an exhaustive repertoire, but as examples of the hermeneutic perspective adopted in the present discussion.

In these works, the table is a silent witness not only of daily life (breakfasts, lunches, and snacks), but also of special occasions and events, characterised by the sense of family intimacy and complicity or of relational and affective difficulty. The table experience itself, together with its rituals, preparatory gestures, and expectations, is condensed in the expression: «dinner's ready! Come to the table!». The presence (or absence) of a table in a character's everyday life reveals the quality (or absence of quality) of the love, prosperity



Pic. 1. Illustration by Federico Maggioni, from Alessandro Manzoni, *I promessi sposi nei disegni di Federico Maggioni (The Betrothed in Federico Maggioni's Drawings)*, Casale Monferrato, Piemonte, 2006.

and happiness materialised in the act of sitting, eating and talking together. It reveals the importance of a shared time, which becomes a precious occasion for self-expression. As the scholar Ilaria Filograsso underlines, a meal is not only an act through which a physiological need is satisfied. Different eating practices, different customs and systems, good table manners: all of this represents a way of expression through which a society shows its essential inclinations, reveals itself, and implicitly discovers its conflicts and limits<sup>33</sup>.

### 3.1. *A table as the setting for an epiphany: The Baron in the Trees*

*The Baron in the Trees* (Calvino, 1959) is the most famous story contained in the trilogy *Our Ancestors* by Italo Calvino. In a rebellious fight with his father, the twelve-year-old protagonist Cosimo Piovasco di Rondò climbs up a tree and decides never to come down again. This decision, initially caused by a futile incident, gives origin to a new and intense adventure. The *anagnorisis* takes place at the memorable midday of 15<sup>th</sup> June 1767, when Cosimo unwillingly joins his family for their last lunch together. The boy refuses to touch even a single shell of the slimy snail soup he has been served. For this reason, after trying in vain to coerce him into eating, his father Baron Arminio Piovasco di Rondò, who is sitting at the head of the table, bitterly scolds him:

‘Well?’ said our father to Cosimo.

‘No, and no again!’ exclaimed Cosimo, and pushed his plate away.

‘Leave the table!’

But Cosimo had already turned his back on us all and was leaving the room.

‘Where are you going?’

We saw him through the glass door as he picked up his tricorn and rapier.

‘I know where I’m going!’ And he ran out into the garden.

In a little while we watched him, from the windows, climbing up the holm oak. He was dressed up in the most formal clothes and headdress, because our father insisted on his appearing at table this way in spite of his twelve years of age.

[...] Cosimo climbed up to the fork of a big branch, where he could settle comfortably, and sat himself down there, his legs dangling, his arms crossed with hands tucked under his elbows, his head buried in his shoulders, his tricorn hat tilted over his forehead.

Our father leaned out the window. ‘When you’re tired of being up there, you’ll change your mind!’ he shouted.

‘I’ll never change my mind’, exclaimed my brother from the branch.

‘You’ll see as soon as you come down!’

‘I’ll never come down again!’ And he kept his word<sup>34</sup>.

In front of Cosimo’s categorical and peremptory refusal to eat, his father banishes him from the family table: the place where human relationships are

<sup>33</sup> I. Filograsso, *Polisemia della fiaba*, Roma, Anicia, 2005, p. 59.

<sup>34</sup> I. Calvino, *The Baron in the Trees*, New York, Harcourt, 1959, pp. 35-38.



traditionally reinforced. Instead of walking through the door, as one would expect, the boy provocatively leaves the room through the window and climbs a tree. He is determined never to come down again. On the top of the trees, moving from branch to branch, from garden to garden, from forest to forest, Cosimo starts an intense, emotional experience, full of human, social and political relations: he even manages to cultivate his passions. He reads, engages in hunting, gives his contribution to the common good, finds love and takes part in the major historical events of the 18<sup>th</sup> century. No exile has ever been more providential. Cosimo's banishment from the family table and decision to climb on the trees is an authentic exercise of liberty, deliberately chosen and coherently respected until the end of his life. This revolution is the clamorous revelation of a new identity, which transforms Cosimo into the legendary *baron in the trees*. In this context, the father's exclamation «leave the table!» – in radical opposition to the traditional invitation “come to the table!” – offers an example of the typical *homelaway* dichotomy<sup>35</sup> of children's literature. Cosimo's physical gesture of leaving the table becomes a metaphor of the boy's distance from the comforts of ordinary life<sup>36</sup>, which would not help him identify his human inclinations. By voluntarily taking distance, Cosimo is able to find his own place in the world.

### 3.2. *A table as the setting for socially disruptive events: Matilda*

*Matilda* is the wonderful protagonist of Roald Dahl's story, originally published with Quentin Blake's beautiful illustrations in 1988. Thanks to her extraordinary intelligence, the little girl becomes a self-taught reader at the age of 3. At the age of 5 she has already gone through the whole children's section of the local library. She goes there in complete solitude, without telling her parents, and starts devouring the masterpieces of world literature (Dickens, Hemingway, Kipling) under the astonished gaze of Mrs. Phelps, the librarian.

Matilda is constantly vexed by the cruelty and stupidity of inadequate and perfidious adults: from her squalid and dishonest parents, to her sadistic and cruel headmistress. Her liberation takes place thanks to her magical powers and to the presence of a sweet teacher who takes good care of her. Is there any particular object that symbolises Matilda's poor relationship with her parents? A table, of course. Or rather, the lack thereof!

<sup>35</sup> See C. Clausen, *Home and Away in Children's Fiction*, «Children's Literature», vol. 10, 1982, pp. 141-152; P. Nodelman, M. Reimer, *The Pleasures of Children's Literature*, Boston, Allyn & Bacon, 2003; P. Nodelman, *The Hidden Adult. Defining Children's Literature*, Baltimore, Johns Hopkins University, 2008.

<sup>36</sup> M. Campagnaro, *Rileggere i classici: una lezione da I nostri antenati*, in Ead. (ed.), *Le terre della fantasia. Leggere la letteratura per l'infanzia e l'adolescenza*, Roma, Donzelli, 2014, pp. 127-128.

They were in the living-room eating their suppers on their knees in front of the telly. The suppers were TV dinners in floppy aluminium containers with separate compartments for the stewed meat, the boiled potatoes and the peas. Mrs Wormwood sat munching her meal with her eyes glued to the American soap-opera on the screen. [...]

'Mummy', Matilda said, 'would you mind if I ate my supper in the dining-room so I could read my book?'

The father glanced up sharply. 'I would mind!' he snapped. 'Supper is a family gathering and no one leaves the table till it's over!'

'But we're not at the table', Matilda said. 'We never are. We're always eating off our knees and watching the telly.'

'What's wrong with watching the telly, may I ask?' the father said. His voice had suddenly become soft and dangerous.

Matilda didn't trust herself to answer him, so she kept quiet. She could feel the anger boiling up inside her. She knew it was wrong to hate her parents like this, but she was finding it very hard not to do so. All the reading she had done had given her a view of life that they had never seen. If only they would read a little Dickens or Kipling they would soon discover there was more to life than cheating people and watching television.

Another thing. She resented being told constantly that she was ignorant and stupid when she knew she wasn't. The anger inside her went on boiling and boiling, and as she lay in bed that night she made a decision. She decided that every time her father or her mother was beastly to her, she would get her own back in some way or another. [...] You must remember that she was still hardly five years old and it is not easy for somebody as small as that to score points against an all-powerful grown-up. Even so, she was determined to have a go. Her father, after what had happened in front of the telly that evening, was first on her list<sup>37</sup>.

*Matilda* is a contemporary story about a bizarre sedition which takes origin from the little protagonist's discomfort at dinner time, as a consequence of the inadequate relational situation within her family. Dahl uses the metaphor of (lacking) conviviality to describe an ineffective and inadequate family model. A family incapable of taking care of Matilda, the five-year-old protagonist who is already capable of recognizing the basic needs of childhood, and looking for strategies to protect herself from the distorted and sick relationships surrounding her. The poor quality of food finds a perfect correspondence in the poor quality of human relationships within the domestic walls.

In Matilda's home, supper is served in the living room, in front of the TV, in silence. There is no table, there is no white tablecloth, there are no clean dishes, glasses or cutlery. They are replaced by a tray with pre-cooked food, aluminium containers, food compartments. The absent, inanimate objects of Matilda's table become dynamic protagonists of a story: the story of desolation, deprivation, and affective poverty in which Matilda is growing up. There are no words to satisfy her appetite for care, affection and love. Apart from some minor revenges, the little girl is forced to look somewhere else for a more adequate family life.

<sup>37</sup> R. Dahl, *Matilda*, New York, Puffin Books, 1988, pp. 27-29.

### 3.3. *A table as the setting for social changes: The Book of Everything*

Children's literature studies have often dealt with authors who successfully intercept cultural transformations and social changes within the family. The tables described in the children's novels by Dutch author Guus Kuijer allow us some considerations, from the anthropological, historical and educational point of view, on how children's literature is able to describe familiar landscapes, at the same time showing, emphasizing or disrupting traditional adult-child power relationships. *The Book of Everything*, originally published in 2004, is the story of Thomas and of his violent and oppressive father, who reads the Bible aloud and violently beats his wife and children:

On the way home, Thomas noticed that father was cross about something. Father said nothing and looked straight ahead. At the table, after the prayer, he said: 'Thomas, stand up'. Thomas was just about to put a forkful of potato and peas into his mouth. His fork stayed halfway up. 'Stand up?' he said.  
 'Stand up', said Father.  
 'Why?' Mother asked, worried.  
 'Because I say so', replied Father.  
 'Oh, that is why', said Margot.  
 Thomas put his fork down on his plate and stood up.  
 [...]  
 'Let us hear what you were singing during the litany', said Father with a stern look on his face.  
 [...]  
 Thomas looked at his mother.  
 'Look at me and sing', said Father.  
 Thomas took a deep breath and sang: 'Musical Lord, forgive our miserable singing'. Then it became terribly quiet. Before his eyes, Thomas saw a black dress with more than a thousand little buttons. Two sparrows on the windowsill were playing bright trumpets, because they didn't know it was Sunday.  
 Mother said, 'He is only nine. He doesn't do it deliberately'.  
 Father was silent. Solemnly, he put his fork and knife down on his plate and stood up. He grew taller and taller until his head was higher than the lamp over the table.  
 Every living thing on earth held its breath. [...] The sun went dark and the sky sank.  
 'What are you doing?' Mother cried. She jumped up and pulled Thomas back.  
 'Go away, woman', Father roared. 'I am speaking to your son'.  
 But Mother pulled Thomas farther away from the table and put her arms around his shoulders. Then Father's hand flashed out suddenly and slapped her on the cheek. She staggered back and let go of Thomas.  
 The angels in heaven covered their eyes with their hands and sobbed loudly, because that is what they always do when a man hits his wife. A profound sadness settled over the earth<sup>38</sup>.

The nine-year-old Thomas is so tenacious and determined that he will finally be able to fulfil his intimate desire to become a happy adult. This is the story contained in his diary, *The Book of Everything*, which gives the title to the novel

<sup>38</sup> G. Kuijer, *The Book of Everything*, New York, Arthur A. Levine Books, 2006, pp. 17-18.

itself. This intimate desire comes from Thomas' rebellion in front of the daily sufferings caused by a violent and oppressive father, who wants to redeem his family and guide it to the straight path by systematically beating them. In the novel, the table is the place where the father's tyranny and violence are revealed. In this case, too, the domestic objects (dish, fork, knife) become animated and contribute to the creation of a moment of domestic *pathos*. At a certain point, the father even uses a wooden spoon to beat Thomas up. The table setting, in the whole novel, is the carrier of extraordinary narrative power. It discloses and concentrates the reflection on family relationships and on a phenomenon of great historical, social and cultural significance: violence against women and children. Thomas is finally able to face his own fears and carry out his revolution by creating an unusual reading group, which celebrates the redeeming power of words: those words which are read and heard around a table, among other places. Thanks to this domestic reading group, Thomas and his mother will be able to stop the father's tyranny and violence.

### *Conclusions*

The table is constantly and regularly present in human life. For adults, it has become a consumed and almost invisible object, but for children it still has a great appeal: its materiality and its forms put in connection knowledge and narration, experience and symbolization<sup>39</sup>. The psycho-emotional-affective education of a child – but also the cognitive one – is closely linked to the domestic environment in which he grows. In this environment he develops the first interior geographical explorations, moving through rooms, walls, furniture and everyday objects. For this reason, the presence of the table is so persistent in children's literature, regardless of different times and genres.

The present investigation concentrates on a "new" research object, considered as a significant indicator for the critical analysis of the changing representation of domestic landscapes and children's life in children's literature. This object appears both in verbal and visual narratives, and it offers a fruitful perspective and a comparative tool for the exploration of family relationships, friendships and feelings.

The proposed methodology for the study of children's literature has been first applied by Laura Sanguineti White in her literary studies. Her investigations of some classics, and in particular of the *Decameron* show how the writer was able to represent the universality of human life starting from everyday objects and events connected with the table.

<sup>39</sup> G. Rodari, *Grammatica della fantasia. Introduzione all'arte di inventare storie*, San Dorligo della Valle, Einaudi Ragazzi, 1997, p. 110.

In the present study, we investigate the association between the physical dimension of the table (shape, dimension and different materials) and its vast symbolic and narrative potential. In many cases the convivial settings even represent the starting point of the narration. The book excerpts mentioned above are all taken from the first pages of the novels. Tables offer an active setting, which reveals the nature and quality of human relationships. In the different situations, they become the «narrating objects» for situations of formal peace-making, for the reunion of a disrupted family, for the celebration of harmony and joy (birthday, wedding, engagement, friendship, etc.), for a love declaration, but also for events that determine the end of loves or friendships. A table reveals an extraordinary epiphany in *The Baron in the Trees*. A table becomes the setting of family divisions in *Matilda*. The table can finally offer an ideal setting for the description of social and cultural problems and changes, in a constantly evolving society, like in *The Book of Everything*.

Even inanimate ornaments and everyday objects, such as dishes, glasses, cutlery and tablecloth can produce narrative movement and take part in the setting, turning into active helpers of the protagonist. A telling example is to be found in the passage from *The Book of Everything*, where Thomas' fork stays halfway up.

The numerous «narrating objects» of children's everyday life may be considered as fruitful research objects in children's literature. They may potentially show mysterious and unexplored aspects of childhood and stimulate the methodological and comparative debate in the discipline.

The present analysis is based on the new perspective of «domestic landscapes» and «domestic miniatures» as a valid interpretation tool for adult-child relationships. The overall objective is contributing to the general scientific analysis of children's literature and proving the complexity of the historical, theoretical and educational reference framework<sup>40</sup> typical of the discipline.

<sup>40</sup> G. Grilli, "Terra di confine". *Lo studio della letteratura per l'infanzia nel panorama internazionale*, in Bernardi, Beseghi (edd.), *Letteratura per l'infanzia: complessità, intrecci, interdisciplinarietà, direzioni di ricerca*, cit., pp. 25-37.



*Sources and  
Documents*



Fonti e  
Documenti





# Il rinnovamento dei «metodi scolastici» nello Stato Pontificio nel carteggio tra Vitale Rosi e Ottavio Gigli (1845-1847)

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*Waiting for a reform of the educational methods in the Papal States during the Restoration.  
The correspondence Rosi-Gigli (1847-1851)*

**ABSTRACT:** The chart that is published here, allows us to understand the anxieties and the attempts of a school reform in the Papal States during the Restoration period advocated by some of the most sensitive men of school and culture. Among them there was the Umbrian educationist Vitale Rosi, a follower of Pestalozzi's and Gerard's theories and a supporter of the introduction of new educational methods. He was the protagonist of an editorial collaboration with the Roman scholar Ottavio Gigli in order to create some text books for popular education.

**EET/TEE KEYWORDS:** Pestalozzi; Girard; Textbooks; Educational methods; Italy; XIX<sup>th</sup> Century.

Figura poliedrica di intellettuale, letterato, divulgatore di cultura e patrocinatore di istituzioni in favore dell'istruzione popolare, il romano Ottavio Gigli (1816-1876) ha giocato un ruolo di primo piano nelle vicende educative dello Stato Pontificio prima e del neonato Regno d'Italia poi<sup>1</sup>. Come

<sup>1</sup> Non esiste, a tutt'oggi, un'organica e documentata biografia di Gigli. Su di lui si vedano: G. Calò, *Ottavio Gigli e i suoi corrispondenti toscani*, «Bollettino senese di storia patria», 1951, pp. 218-231; A. Gambaro, *Carteggio inedito Ferrante Aporti-Ottavio Gigli*, in A. Gambaro, G. Calò, A. Agazzi, *Ferrante Aporti nel primo centenario della morte, con documenti e carteggi inediti*, Brescia, Centro Didattico Nazionale per la Scuola Materna, 1962, pp. 169-195; R. Sani, *I*

è ampiamente noto, la sua prima iniziativa sul terreno educativo prendeva avvio con la fondazione, avvenuta nel gennaio 1845, de «L'Artigianello», un periodico che aveva significativamente per sottotitolo: «Lecture morali, religiose ed istruttive per servire alle scuole notturne di religione e alle famiglie». Esso segnò per Gigli non solo la prima manifestazione dei suoi interessi in favore del problema dell'istruzione dei ceti popolari, ma anche l'inizio di un percorso nel campo dell'editoria popolare ed educativa che lo avrebbe portato a contatto con i principali esponenti della pedagogia del suo tempo, tra i quali l'umbro Vitale Rosi, già direttore del Seminario Collegio di Spello e autore di un *Manuale di scuola preparatoria* che, edito nel 1832 a Foligno, era balzato agli onori grazie ad una nuova edizione stampata a Firenze per i tipi di Viessesux nel 1844, grazie ai buoni uffici del pedagogista Raffaello Lambruschini che tanto aveva apprezzato quel testo di cui permise la conoscenza a eminenti personalità della cultura del tempo, da Niccolò Tommaseo, a Stefano Bianciardi, a Giuseppe Sacchi, ad Antonio Rosmini<sup>2</sup>. Accreditosi per i suoi meriti, Rosi veniva contattato sul finire del 1845 proprio da Gigli e da lì sarebbe iniziata una fitta corrispondenza tra i due intellettuali che, partendo da una proposta di collaborazione alle iniziative editoriali promosse dallo studioso romano, si sarebbe estesa fino a toccare argomenti di più vasto respiro, come la necessità di una riforma dei metodi didattici adottati nell'istruzione elementare dello Stato Pontificio, riforma che sembrava tanto più a portata di mano in quegli anni grazie ai fermenti suscitati dalle innovazioni politiche introdotte dal nuovo papa Pio IX<sup>3</sup>. Il

*periodici scolastico-educativi e il dibattito sull'istruzione nello Stato Pontificio*, in G. Chiosso (ed.), *Scuola e stampa nel Risorgimento. Giornali e riviste per l'educazione prima dell'Unità*, Milano, FrancoAngeli, 1989, pp. 147-170; Id., *Istruzione e istituzioni educative nella Roma pontificia (1815-1870)*, in L. Pazzaglia (ed.), *Chiesa e prospettive educative in Italia tra Restaurazione e Unificazione*, Brescia, La Scuola, 1994, pp. 707-771; M. Cattaneo, *Gigli Ottavio*, in *Dizionario Biografico degli Italiani*, Roma, Istituto della Enciclopedia italiana, 2000, vol. 54, pp. 688-690; R. Sani, *Le Scuole notturne per gli artigiani nella Roma pontificia (1818-1870)*, in R.M. Borraccini, G. Borri (edd.), *Virtute et Labore. Studi offerti a Giuseppe Avarucci per i suoi settant'anni*, 2 voll., Spoleto, Centro Italiano di Studi sull'Alto Medioevo, 2008, pp. 939-984; J. Meda, *Gigli Ottavio*, in G. Chiosso, R. Sani (edd.), *DBE: Dizionario biografico dell'educazione (1800-2000)*, 2 voll., Milano, Bibliografica, 2013, Vol. I, pp. 674-675; 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.

<sup>2</sup> Si vedano la recensione di N. Tommaseo edita in «Giornale Eugenio di scienze, lettere e arti», vol. II, 1845, pp. 65-75; quella di G. Sacchi, *Rivista di opere sull'educazione popolare*, «Rivista Europea», n. 1, 1845, pp. 78-93; quella di S. Bianciardi, *Notizie di libri utili*, «Guida dell'educatore», n. 1, 1845, pp. 173-183. Quanto a Rosmini, il suo biografo, Francesco Paoli, cita una lettera da Stresa del primo maggio 1839 nella quale si «congratulava» con Rosi (cfr. F. Paoli, *Memorie della vita di Antonio Rosmini-Serbati*, Torino, Stamperia reale della ditta G.B. Paravia e C., 1880, p. 286). Rosmini, inoltre, inserì il manuale di Rosi tra i libri consigliati come letture ai fratelli dell'Istituto della Carità e alle Suore della Provvidenza (cfr. G. Chiosso, *Carità educatrice e istruzione in Piemonte. Aristocratici, filantropi e preti di fronte all'educazione del popolo nel primo '900*, Torino, Società Editrice Internazionale, 2007, p. 143).

<sup>3</sup> Vitale Rosi (Spello, 1782 - ivi, 1851), compì gli studi presso il Seminario «Felice» della

carteggio, affrontando il problema dell'individuazione dei più opportuni metodi didattici nel campo dell'istruzione primaria e, in particolare, dell'insegnamento della lingua materna, si inserisce nel quadro del dibattito sulla questione del metodo, dibattito molto animato negli anni Quaranta dell'Ottocento e a cui partecipano numerosi uomini di scuola ed educatori, a cominciare dagli studiosi piemontesi, come Domenico Berti, che sarà autore, nel 1849, del volume sul «metodo applicato all'insegnamento elementare», opera considerata una pietra

città natale, dove entrò all'età di otto anni come convittore esterno. Successivamente vestì l'abito talare e divenne nello stesso istituto maestro d'Umanità e Grammatica, poi di Retorica, per infine ricoprire le cariche di vicerettore e di rettore. Questa prima esperienza gli permise di verificare l'inadeguatezza dei metodi di insegnamento allora in uso tanto da essere spinto ad introdurre delle innovazioni di vario genere: propose un sistema di insegnamento della lingua latina, lontano dalla ripetitiva e meccanica prassi allora in uso, basata sullo studio astratto e mnemonico delle regole grammaticali: a tal proposito Rosi stimava necessario partire dalla lingua materna, di cui apprendere i primi rudimenti della grammatica per quindi passare allo studio del latino. Fu debitore del pensiero di Pestalozzi e di padre Girard, dai quali trasse suggerimenti metodologici e teorici e ai quali dichiarò apertamente di ispirarsi. Introdusse nella sua scuola anche il sistema Bell-Lancaster, vale a dire il mutuo insegnamento, anche se pochi anni dopo fu costretto a interrompere questa esperienza a causa dell'intervento censorio delle autorità romane. Solo grazie alla protezione accordata dal vescovo di Foligno, Stanislao Lucchesi, venne sospeso e poi revocato un decreto che avrebbe addirittura portato alla chiusura della scuola, ma in compenso Rosi dovette accettare di modificare l'impianto pedagogico fino ad allora seguito. Nel 1827, in seguito ad una profonda crisi di coscienza, lasciò la vita religiosa e si sposò con Luigia Petroni di Trevi, dalla quale ebbe due figli. Questo evento ebbe come conseguenza la decadenza dalla carica di rettore del collegio che, per giunta danneggiato dal terremoto del 1832, venne chiuso. Nel 1837, grazie ad alcuni restauri, l'edificio tornò ad ospitare il collegio ma la carica di rettore passò ad un religioso, l'abate Franceschini; nel 1844 Rosi chiedeva il pensionamento al Comune. Nel corso del 1848, nella speranza di cambiamenti politici e sociali alimentata dalle riforme concesse da Pio IX, Rosi si recò a Roma e sottopose i suoi metodi pedagogici all'esame della Congregazione degli Studi: in realtà ricevette una fredda accoglienza e i suoi propositi furono largamente disattesi. Ricoprì per vari anni la carica di gonfaloniere di Spello, cioè di capo della municipalità, dando prova dei suoi sentimenti liberali. Tuttavia non aderì alla Repubblica Romana del 1849, circostanza che alimentò qualche sospetto sul suo orientamento politico. Ma già alla caduta del governo repubblicano Rosi tornava ad essere bersaglio di attacchi dei settori più tradizionalisti della Curia Romana: nel febbraio 1850 venne infatti accusato di ateismo e di protestantesimo mentre il Seminario finì sotto il controllo della Direzione di polizia con l'accusa di contenere «semenze di protestantesimo». Su Rosi si rinvia a: E. Reali, *Cenni biografici di Vitale Rosi da Spello*, «Rivista delle Marche e dell'Umbria», vol. I, gennaio 1866, pp. 531-543 e seconda parte del medesimo articolo nel fascicolo successivo del febbraio 1866, pp. 687-696; A. Lupatelli, *Vitale Rosi*, s.e., 1873; G. Fratini, *Cenni biografici di Vitale Rosi di Spello: decimaquinta pagina d'istoria patria*, Foligno, Stab. tip. Pietro Sgariglia, 1886; A. Martinazzoli, L. Credaro (edd.), *Dizionario illustrato di Pedagogia*, Milano, F. Vallardi, s.d. (ma 1892-1903), pp. 407-410; V. Marucci, *Vitale Rosi: il Girard dell'Italia*, Ravenna, Tip. Nazionale, E. Lavagna e C., 1919; G. Calò, *Rosi Vitale*, in *Enciclopedia italiana*, 1936; E. Codignola (ed.), *Pedagogisti ed educatori*, Roma, Tosi, 1939, pp. 365-366; S. Anceschi Bolognesi, *Il Socrate dell'Umbria: Vitale Rosi e la sua pedagogia*, Reggio Emilia, Grafica, 1968; *Giornata commemorativa di Vitale Rosi: 7 dicembre 1969. Discorso pronunciato dal prof. Aurelio Valeriani*, Spello, Caroli, 1971; L. Montecchi, *Rosi Vitale*, in Chiosso, Sani (edd.), *DBE: Dizionario biografico dell'educazione (1800-2000)*, cit., Vol. II, pp. 428-429.

miliare del «metodismo subalpino» che, non a caso, non ignorerà quanto scritto in precedenza da Rosi<sup>4</sup>.

È per tale ragione che si è deciso di pubblicare in questa sede il carteggio tra Rosi e Gigli, limitatamente alle lettere inviate dal primo al secondo, vale a dire le uniche superstiti dell'epistolario tra i due studiosi. Conservate attualmente presso l'Archivio storico dell'INDIRE di Firenze, dove giunsero insieme a buona parte delle carte appartenute a Ottavio Gigli, le lettere in questione furono ritracciate e consultate da Giovanni Calò, allorquando questi intraprese una ricerca sulla figura dello studioso romano i cui risultati confluirono nell'articolo intitolato *Ottavio Gigli e i suoi corrispondenti toscani*, edito nel 1951 nel «Bollettino senese di storia patria»<sup>5</sup>. In questo saggio Calò si limitò a fornire un primo profilo biografico del letterato romano, non mancando però di menzionare Rosi e la sua collaborazione alle iniziative editoriali del Gigli e ripromettendosi, a questo proposito, di pubblicare le lettere ritrovate. Scrisse Calò: «Il Rosi fu largo di consigli al Gigli, e il suo carteggio con quest'ultimo, soprattutto in merito all'accennata stampa dell'aritmetica, spero ugualmente di pubblicare tra poco»<sup>6</sup>. Quel proposito, come sappiamo, non trovò traduzione pratica ed è anche per questa ragione che abbiamo deciso di pubblicare queste lettere nella convinzione di portare un contributo di conoscenza alla storia dell'educazione del nostro Paese negli anni del Risorgimento.

Lo scambio di lettere tra i due intellettuali prende avvio, nel dicembre 1845, intorno alla proposta formulata da Gigli a Rosi di collaborare alla sua nuova collana editoriale, la *Biblioteca delle famiglie*, nata per favorire l'istruzione e l'educazione intellettuale e morale delle famiglie dello Stato Pontificio. L'ambizioso progetto, che prevede la stampa di circa cento volumi, vede l'adesione, nella veste di collaboratori, dell'abate Ferrante Aporti, del principe Carlo Buonaparte, del cavalier Adriano Balbi, dell'abate Giuseppe Baruffi, del cavalier Giacinto Collegno, del professore Giovanni Plana, del dottor Luigi Masi, del professore Francesco Orioli, del conte Pietro Selvatico, del professore Gioacchino Taddei e del marchese Orazio Antinori<sup>7</sup>. Il piano dell'opera prevede una sezione con brani scelti tratti dalla letteratura, una enciclopedia delle arti e dei mestieri e, posta all'inizio, una parte di carattere generale intitolata «educazione intellettuale». Quest'ultima include un «trattato di pedagogia», un «abecedario», le «regole

<sup>4</sup> D. Berti, *Del metodo applicato all'insegnamento elementare*, Torino, Paravia, 1849. Sul dibattito sul metodo si rinvia a G. Chiosso, *Libri, editori e scuola a Torino nel secondo Ottocento*, «Annali di storia dell'educazione», vol. 4, 1997, pp. 85-116; Id., *Carità educatrice e istruzione in Piemonte*, cit., pp. 213-296).

<sup>5</sup> Calò, *Ottavio Gigli e i suoi corrispondenti toscani*, cit., pp. 218-231.

<sup>6</sup> *Ibid.*, p. 224.

<sup>7</sup> I nominativi dei collaboratori si possono leggere sulla quarta di copertina di un volumetto della collana, e cioè del *Metodo per adoperare fruttuosamente l'abecedario e sillabario ad uso dell'infanzia e definizione delle parole in esso contenute*, opera dell'abate Ferrante Aporti del 1847.

grammaticali», un «dizionario di lingua italiana», gli «elementi di elocuzione», fino a inglobare nozioni di geografia, mitologia, astronomia, architettura, fisica, chimica, botanica, filosofia e altre discipline<sup>8</sup>.

Dichiaratosi interessato al progetto sottopostogli, il 12 dicembre 1845 Rosi risponde a Gigli mostrando la sua disponibilità a far stampare nella nuova collana il suo *Manuale di scuola preparatoria*, previo il consenso dell'editore fiorentino Vieusseux che l'anno prima lo ha riedito. Il pedagogista umbro suggerisce, inoltre, che esso venga adottato nelle «scuole notturne» di cui a Roma e nel resto dello Stato Pontificio si sta favorendo la diffusione in quel momento grazie anche all'impegno di Gigli, che significativamente ha voluto come sottotitolo per «L'Artigianello», quello di giornale per le «scuole notturne»:

Essendo questo mio lavoro una Grammatica Generale di cui si è dato l'apprendimento col mezzo della lingua materna, mediante il metodo con che fu trattato dell'analisi, al mio corto giudizio parrebbe che potesse riuscire un libro popolare quant'egli bramar si potesse per uso delle scuole notturne<sup>9</sup>.

Nella stessa lettera Rosi non manca di segnalare il fatto di tenere pronte le bozze per una inedita Aritmetica. Quest'ultima proposta incontra maggiormente l'interesse di Gigli, che nelle settimane seguenti propone al pedagogista un «compenso» apposito, mentre sfuma l'ipotesi di una ristampa del *Manuale di scuola preparatoria*, forse per il diniego sopraggiunto dall'editore fiorentino.

Le lettere di Rosi che seguono vertono sulla scelta di un sillabario da inserire nella collana: chiamato ad esprimersi tra il *Sillabario italiano proposto da F. M.*, stampato a Bologna, e quello di Louis Boggiany ristampato a Firenze, egli dichiara la sua preferenza per il primo, anche se il migliore che sia stato stampato in Italia gli appare quello del Lambruschini<sup>10</sup>. Lo scambio di opinioni su questo sussidio didattico continua nelle settimane successive, nella primavera 1846: del resto la scelta di un buon sillabario è questione di capitale importanza per quella riforma dei metodi didattici che sta a cuore a Rosi, il quale, infatti scrive: «un perfetto alfabeto-sillabario, dal quale è d'uopo cominciare la riforma dei metodi scolastici». Analizza così i pregi del sillabario del Parravicini, di cui propone una stampa «come preparativo d'un buon Sillabario», mentre dichiara di non aver potuto ancora vedere quello edito a Torino dal «Professor Troya»<sup>11</sup>. Il frutto del confronto tra i due studiosi su questo argomento porterà all'edizione, avvenuta

<sup>8</sup> A. Gennarelli, *Cose diverse. Storia. Storie municipali delle città cospicue dello Stato Pontificio*, «Il saggiatore: giornale romano di storia, letteratura, belle arti», vol. III, 1846, pp. 184-186.

<sup>9</sup> Archivio Storico Indire di Firenze (d'ora in avanti ASIF), Fondo «Ottavio Gigli» (d'ora in avanti FOG), b. 15, fasc. 11, Lettera di Rosi a Gigli, 12 dicembre 1845.

<sup>10</sup> *Sillabario italiano proposto da F. M.*, stampato a Bologna, tip. della Volpe al Sassi.

<sup>11</sup> V. Troya, *Guida pratica per usare con frutto l'abecedario e sillabario: adottato nelle scuole elementari*, Torino, Stamperia reale, 1842.

proprio nel corso del 1846, da parte di Gigli del *Sillabario e alfabeto figurato, e racconti morali*, uscito nella sua collana *Biblioteca delle famiglie*<sup>12</sup>.

Dallo scambio di lettere della primavera del 1846 risuona anche l'eco dell'elezione del nuovo papa, Pio IX, e delle speranze di rinnovamento e di apertura che questo avvenimento ha portato con sé. L'auspicio di Rosi è che nel generale clima favorevole al cambiamento si possa finalmente varare una riforma dell'istruzione e che possano cessare le ostilità infrapposte dagli ambienti della Curia romana e della Sacra Congregazione degli Studi verso di lui e i suoi metodi sperimentati anni prima nel Seminario Collegio di Spello. Scrive il pedagogista:

Finalmente il vostro presagio sulla sollecita elezione del Pontefice si è avverato. Se siete vero profeta, attendo ora che si avveri l'altra parte della vostra profetica penna, quale si è la riforma degli Studj nello Stato e in specie a Spello. Ditemi dunque quali siano gli appoggi delle vostre speranze in questo nuovo pontefice perché possiamo dare opera ai nostri progetti riguardo agli Studj di Spello<sup>13</sup>.

Frattanto l'idea di far uscire l'Aritmetica del Rosi in uno dei volumi della collana, viene sposata da Gigli. Il pedagogista vi lavora nel corso del 1846, invia all'editore le bozze che poi corregge, e quasi alla fine dell'anno l'opera, in due volumetti, è pronta con un titolo altamente significativo: *Elementi di aritmetica pratica e teorica compilati secondo il metodo di Pestalozzi da un suo allievo ed ora modificati con applicazioni allo scopo morale*. Come è evidente, esso richiama espressamente il pensiero pedagogico di Pestalozzi, ma al contempo la volontà di sottolineare le modifiche apportate «allo scopo morale» sembra un tentativo di voler coniugare il metodo pestalozziano con quello di padre Girald, che del pensiero dello studioso tedesco aveva criticato proprio la scarsa attenzione riservata all'educazione morale.

La collaborazione alla collana di Gigli non si limita qui. Sempre nel corso del 1846 Rosi propone all'amico romano le bozze per una Grammatica Italiana scritte da Ranieri Pandolfi di Fabriano<sup>14</sup>. Lo studioso umbro ne caldeggia la stampa poiché il «metodo è analitico e veramente Pedagogico» e quando viene manifestata per esigenze editoriali la necessità di ridurre da tre a due i volumetti componenti l'opera, egli non manca di difendere il progetto originario di Pandolfi. Se proprio si deve risparmiare, afferma Rosi, conviene che Gigli revisioni il

<sup>12</sup> Gigli invia a Rosi una copia del suo sillabario appena stampato, come si desume da una lettera del pedagogista umbro: «Vi ringrazio dell'Aritmetica, come del Sillabario, che dite di avermi spedito con la Diligenza, ma che non ho ricevuto a tutt'oggi» (ASIF, FOG, b. 15, fasc. 11, Lettera di Rosi a Gigli, 26 novembre 1846).

<sup>13</sup> ASIF, FOG, b. 15, fasc. 11, Lettera di Rosi a Gigli, 20 giugno 1846.

<sup>14</sup> Poco nota è la figura del Pandolfi, di cui si sa che nell'anno scolastico 1868-69 insegnava nel «Liceo comunitativo» di Fabriano (*Annuario della Istruzione Pubblica del Regno d'Italia del 1868-69*, Torino, Tipografia del Giornale Il Conte Cavour, 1869, p. 161). Tra il 1874 e il 1876 pubblicò un *Corso di lingua latina* in due volumi (Fabriano, Tip. Fabi-Milanesi, 1874; Recanati, Tip. R. Simboli, 1876).

progetto della “Biblioteca delle famiglie”, ampliando la parte pedagogica e riducendo quella dedicata ai classici, «giacché de’ classici Italiani riboccano le case e le biblioteche, ma si scarseggia assai di libri pedagogici così detti nel rigore del termine»<sup>15</sup>. A poco valgono le richieste di Rosi poiché alla fine l’opera, intitolata *Corso di lingua materna ad uso delle scuole e delle famiglie*, viene stampata in due volumi nella collana che, nel frattempo, ha visto l’edizione di un volume dell’abate Aporti, il *Metodo per adoperare fruttuosamente l’abecedario e sillabario ad uso dell’infanzia e definizione delle parole in esso contenute*<sup>16</sup>.

Dal carteggio tra i due studiosi emergono non solo le questioni attinenti al progetto della *Biblioteca delle famiglie*, ma anche il ruolo di mediatore svolto da Gigli, vero e proprio attore sulla scena culturale e politica romana. Ciò appare bene, ad esempio, quando Rosi, in cerca di qualcuno che patrocinasse la sua causa negli ambienti della Curia al fine di riprendere il controllo del Collegio Seminario di Spello, si rivolge proprio a Gigli, che costituisce un’ottima carta da spendere in tal senso. Quest’ultimo, difatti, si rivolgerà al Segretario della Congregazione degli Studi e pochi giorni dopo a Rosi giungeranno notizie confortanti:

Qui comincia a vedersi qualche buon effetto della mia venuta in Roma, da che un Dispaccio dell’Eminentissimo Mezzofante diretto al nostro Vescovo mi fa non tenue onore e gli viene insinuato a porsi d’intelligenza con me in fatto di pubblica istruzione e di collegio. Di tali vantaggi ne debbo sapere ottimo grado anche a V.S. mercè i vevoli ufficj da Lei praticati verso il Segretario degli Studj<sup>17</sup>.

Proprio durante quel viaggio a Roma, compiuto tra il gennaio e il febbraio 1846, Rosi aveva fatto la conoscenza di molte personalità e ciò era stato possibile, ancora una volta, grazie a Gigli, come apprendiamo dalla lettera scritta dopo essere tornato a Spello:

Le tengo somma obbligazione per le gentilezze di che mi fu cortese la bontà sua in codesta Dominante, sì ancora per le relazioni ch’ella mi procacciò di persone rispettabili per belle qualità di mente e di cuore e che trovai ben degne della Sua amicizia. Ed io priego Lei di volermi rammentare a tutti di codesta sì brava società ed in particolar modo al felicissimo estemporaneo Sig.r Masi anche per parte del mio compagno di viaggio<sup>18</sup>.

E ancora, quando nel 1847 esce su «Il Contemporaneo» una recensione al suo *Manuale di Scuola Preparatoria*, Rosi chiede lumi all’amico circa l’identità dell’estensore dell’articolo, Sebastiano Scarabelli, «tra i pochi maestri [...] ben

<sup>15</sup> AIF, AOG, b. 15, fasc. 11, Lettera di Rosi a Gigli, 11 marzo 1847.

<sup>16</sup> R. Pandolfi, *Corso di lingua materna ad uso delle scuole e delle famiglie*, Roma, Tipografia della Società Editrice Romana, 1848; F. Aporti, *Metodo per adoperare fruttuosamente l’abecedario e sillabario ad uso dell’infanzia e definizione delle parole in esso contenute*, Roma, Società Editrice Romana, 1847.

<sup>17</sup> ASIF, FOG, b. 15, fasc. 11, Lettera di Rosi a Gigli, 16 febbraio 1846.

<sup>18</sup> *Ibid.*, Lettera di Rosi a Gigli, 16 febbraio 1846.

addentro penetrato [...] in fatto di Scienza Pedagogica poco conosciuta dai più dei maestri nello stato nostro» e prega Gigli di farglielo conoscere<sup>19</sup>.

Il carteggio conservato nell'Archivio dell'INDIRE di Firenze si conclude con un'ultima lettera di Rosi datata 15 ottobre 1847. Da essa si ricavano notizie ancora sul lavoro di revisione delle bozze della Grammatica del Pandolfi, lavoro condotto dall'autore e dallo stesso Rosi. In chiusura, non manca una frase alquanto emblematica dello studioso umbro che la dice lunga sullo stato di sostanziale isolamento in cui fu messo questo pedagogista aperto alle idee provenienti da oltralpe e di simpatie liberali, guardato sempre con circospezione dalla Curia romana, così come i suoi biografi hanno tramandato: «Sarei già in Roma, se non me lo avesse impedito M[onsigno]r Tela[...]to, il quale vuole ch'io prima di muovere di Spello, sia munito di assenso della Segreteria di Stato. Avreste voi un canale sicuro onde conseguire l'intento?»<sup>20</sup>. Tutto ciò avveniva alla vigilia dei rivolgimenti politici del 1848-49 che avrebbero dato, per l'ultima volta, all'anziano Rosi l'illusione di quella radicale riforma della pubblica istruzione dello Stato pontificio che in cuor suo aveva sempre sognato e per cui aveva patito le conseguenze nella sua vita da educatore.

### 1. *Vitale Rosi a Ottavio Gigli, Spello 12 dicembre 1845*<sup>21</sup>

Onorando Sig.r Direttore

Nel momento ch'io divisava derigere [sic.] a V.S. una mia gradulatoria sulla più utile delle imprese quale si è il miglioramento della crescente generazione, mi veggio onorato d'una Sua Pregiatiss[im]a in data degli 8. stante, col quale si piace la Bontà Sua d'incoraggiare le povere mie fatiche, invitandomi ad associarle colle Sue. La mia età peraltro, le mie occupazioni e lo scopo che mi sono prefisso non so se mi permetteranno di rispondere alle sue belle intenzioni. Le dico intanto ch'Ella osservi la ristampa del mio Manuale di Scuola Preparatoria, ch'Ella stessa troverà di cotesto Direttore G[enera]le delle Poste, il Sig.r Capobianchi, cui lo ebbe inviato lo stesso Editore di Firenze.

Essendo questo mio lavoro una Grammatica Generale di cui si è dato l'apprendimento col mezzo della lingua materna, mediante il metodo con che fu trattato dell'analisi, al mio corto giudizio parrebbe che potesse riuscire un libro popolare quant'egli bramar si potesse per uso delle scuole notturne. Quando V.S. lo riconosca tale ci porremo d'intelligenza coll'editore Fiorentino per l'assenso [sic] d'una ristampa col mezzo della Sua Biblioteca.

La prevengo intanto ch'io trovomi [sic] ad avere un'aritmetica inedita parimenti analitica da impararsi a mente coll'applicazione degli esempi; alla morale ed alla

<sup>19</sup> *Ibid.*, Lettera di Rosi a Gigli, 25 maggio 1847.

<sup>20</sup> *Ibid.*, Lettera di Rosi a Gigli, 15 ottobre 1847.

<sup>21</sup> *Lettera di due facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 1 – Cat. V»).



formazione del cuore. Se questa potesse o no servirle, starà a Lei il deciderlo da un qualche quaderno che potessi spingerle dell'originale sul che mi starò attendendo analogo suo incontro. Del resto io non ho se non che lodare l'ottimo Suo divisamento quale è quello di giovare la società con un rimedio radicale. Come pure mi è piaciuto che a ciò abbia V.S. scelto la Capitale dello Stato, perché così si evita la malignità che più abbonda nei piccoli paesi e la Superiorità trovandosi a toccar con mano le cose non v'è caso che si allarmi sulla purità e rettitudini delle buone intenzioni. Da un parroco della Vescia mi fu retroceduto l'abbonamento dell'Artigianello; così mi sono trovato abbonato a questo Suo giornale senza ch'ella lo sapesse. Questo Sig.r Governatore Dini, avendomi presentato un suo manifesto per la Biblioteca delle Famiglie, vi ho posta la mia firma sotto il n° 129, intendendo con ciò di continuare il precedente Giornale il buon esito della laboriosa e lodevolissima impresa è il desiderio più fervente del mio cuore, che tra le tante felicitazioni intendo farle nella prossima ricorrenza della S.Natale. Con tali sentimenti ho il bene di rassegnarmi con tutto il cuore.

Di V.S. onorando Sig.r Dirett[or]e  
Di Spello 12 dicembre 1845<sup>22</sup>

D[evotissi]mo, Ob[bligantissi]mo Servid[or]e  
Vitale Rosi

## 2. Vitale Rosi a Ottavio Gigli, Spello 16 febbraio 1846<sup>23</sup>

Sig. Gigli mio P[ad]rone ed Rispettabile A[mic]o

Serve la presente a notificarle l'ottimo nostro viaggio e ritorno in patria la sera dei 9. stante. Del resto non posso dirle nulla ancora del noto lavoro sillabico, da che le molte pendenze dei miei privati e pubblici interessi non mi permettono di occuparmi un solo istante al tavolino. Spero peraltro che mi riesca far qualche cosa nella ventura settimana. Qui comincia a vedersi qualche buon effetto della mia venuta in Roma, da che un Dispaccio dell'Eminentiss[im]o Mezzofante<sup>24</sup> diretto al nostro Vescovo<sup>25</sup> mi fa

<sup>22</sup> L'originale riporta l'anno 1825, ma è chiaramente un errore di Rosi, considerando il contenuto della lettera e i suoi riferimenti a «L'Artigianello», che iniziò le sue pubblicazioni nel 1845.

<sup>23</sup> *Lettera di due facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 2 – Cat. V»).

<sup>24</sup> Giuseppe Gaspare Mezzofanti (Bologna, 1774-Roma, 1849) fu cardinale e insigne linguista. Già custode della Biblioteca Vaticana, ricoprì la carica di prefetto della Congregazione degli studi tra il 1846 e il 1849 (F. Pasti, *Un poliglotta in biblioteca: Giuseppe Mezzofanti (1774-1849) a Bologna nell'età della restaurazione*, Bologna, Pàtron, 2006; Ministero per i beni e le attività culturali-Direzione generale per gli archivi, *Congregazione degli studi. La riforma dell'istruzione nello Stato pontificio (1816-1870). Inventario a cura di M.I. Venzò*, Roma, Ministero per i Beni e le Attività Culturali, 2009, p. LI).

<sup>25</sup> Il vescovo di Foligno, sotto la cui giurisdizione si trovava Spello, era a quel tempo monsignor Nicola Belletti da Cesena, eletto ordinario nel 1843. Cfr. E. Bianchi, E. Bogini, P. Zucchetti (edd.), *L'archivio storico della Diocesi di Foligno: inventario*, Perugia, Soprintendenza archivistica per l'Umbria, 2011, p. 25.

non tenue onore e gli viene insinuato a porsi d'intelligenza con me in fatto di pubblica istruzione e di collegio. Di tali vantaggi ne debbo sapere ottimo grado anche a V.S. mercé i valevoli ufficj da Lei praticati verso il Segretario degli Studj; come pure Le tengo somma obbligazione per le gentilezze di che mi fu cortese la bontà sua in cotesta Dominante, sì ancora per le relazioni ch'ella mi procacciò di persone rispettabili per belle qualità di mente e di cuore e che trovai ben degne della Sua amicizia. Ed io priego [sic] Lei di volermi rammentare a tutti di cotesta sì brava società ed in particolar modo al felicissimo estemporaneo Sig.r Masi<sup>26</sup> anche per parte del mio compagno di viaggio. Viva sano e si conservi pel bene degli amici, e dell'intera società, a cui procura con tanto ardore il massimo dei vantaggi. Mi creda in fine [sic] con sensi di sincera stima e di grato animo.

Di Lei

Di Spello li 16 Feb[brai]o 1846

Ob[bligatissi]mo Servo e A[mic]o  
Vitale Rosi

### 3. Vitale Rosi a Ottavio Gigli, Spello 19 febbraio 1846<sup>27</sup>

Sig.r Gigli mio Onorando A[mic]o

Fra i molteplici e variati metodi proposti da Saggi amatori della civil società per insegnare la lettera, non pochi ve ne ha che o per un titolo e per l'altro tornerebbero assai vantaggiosi all'infanzia. Ma dovendo noi scerre [sic] per le Scuole notturne uno tra tutti che per brevità e comune intelligenza degl'insegnanti e dei discenti riesca più universale e più economico pel tempo e pel dispendio, ci siamo fermati su quello del Boggiany di Firenze e del F. M. di Bologna. Istituito il confronto tra questi due si trovano identici in fatto di metodo, quale si è il Sillabico da preferirsi all'alfabetico, la via peraltro tracciata da loro è un poco diversa. Si desiderava da Voi e dall'Ab[at]e Romanini<sup>28</sup>, che io completassi ciò che v'era di monco nel Sillabario del Boggiany, che ordinassi un po' meglio l'orditura, allungassi certi [sic] lezioni, aggiungessi altri racconti in fine del

<sup>26</sup> Luigi Masi (Petriano di Assisi, 1814 – Palermo, 1872), collaboratore di alcuni periodici romani, tra i quali «L'Artigianello», «Il Popolare» e «Il Viminale», fu protagonista di numerose manifestazioni che, a partire dal luglio del 1846, furono organizzate per sostenere lo sforzo riformatore di Pio IX. In tal senso si distinse la sua opera per il periodico «Il Contemporaneo», da lui lanciato, finanziato e, per qualche tempo anche diretto. Aderì alla Repubblica Romana del 1849 e, per questo, fu costretto all'esilio a seguito della restaurazione. Nel 1860 Cavour gli affidò il comando di uno dei corpi volontari da impiegare in appoggio alle truppe regie durante la campagna delle Marche e dell'Umbria. Su di lui si veda il profilo pubblicato in *Dizionario Biografico degli Italiani*, Roma, Istituto della Enciclopedia italiana, 2008, vol. 71, pp. 592-595.

<sup>27</sup> *Lettera di due facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 3 – Cat. V»).

<sup>28</sup> L'abate Pietro Romanini fu attivo promotore delle scuole notturne a Roma. Pubblicò anche le *Regole che si praticano nella Scuola Elementare Notturna esistente in Roma Via dell'Arco de' Ginnasi n. 6*, Roma, Tipografia della Società Editrice Romana, 1848.

libro per uso di lettura. Ebbene si trova tutto questo a mio corto vedere nel Sillabario di Bologna intitolato = Sillabario Italiano proposta da F. M = Bologna, tip. Gov. della Volpe al Sassi 1836. Io non saprei assolutamente far di meglio; siccome non per ricusare l'incarico datomi da Voi, ma per non perdere il tempo in un lavoro che già trovasi completo, vi consiglieri a ristampare il riferito libretto discreto di volume e di prezzo. Io ritengo che trovisi costì vendibile presso il Gallerini od altro librajo; in caso contrario non avrei difficoltà d'inviarvi sottofascia col mezzo della posta il mio unico esemplare, che potrei riavere in seguito della vostra ristampa. Osservate dunque l'opuscolo e troverete [sic] tra le altre cose distribuite per colonne le sillabe e a rincontro le parole formate da tali sillabe che ne sono gli elementi o brani, vantaggio che resta in desiderio nel Boggiany. Quando avrete esaminato il metodo, che a me pare corrispondente al fine, e completo per essere esaurite per intero le combinazioni sillabiche, me ne direte il vostro parere. In tale attesa vi preiego de' miei distinti saluti a tutti della dotta Società; ed a credermi con vera stima e pari benevolenza.

Di Spello li 19 Feb[brai]o 1846

P.S. Catechismo del Sacerdote D. Antonio Rosmini-Serbati secondo l'ordine delle idee seconda ediz[ion]e Milano-tipografia Boniardi Pogliani -1844

V[ostr]o Ob[bligatissi]mo, Aff[ezionatissi]mo A[mic]o  
Vitale Rosi

#### 4. *Vitale Rosi a Ottavio Gigli, Spello 13 marzo 1846*<sup>29</sup>

Mio Rispettabile A[mic]o e P[ad]rone

Di Spello li 13 Marzo 1846

Ho ricorretto e fatto copiare il primo quaderno di Aritmetica a mente. Attendo qualche sicura ed economica occasione, onde mandarlo alla vostra direzione unitamente al Sillabario Bolognese, a quello del Boggiany ed al Catechismo del Rosmini.

In quanto all'aggiunta dell'ortografia e dell'Ortopeja mi sono contentato di citare quegli articoli del mio Manuale che ne trattano, onde ricorrere al med[esim]o per farne uso, senza moltiplicare inutilmente le stampe. Tengo che vi andrà bene. Se avrete qualche occasione da farvi tenere i detti oggetti, favorirete accennarmeli. Gradite intanto e fate gradire anche per parte del Dot.r Pandolfi<sup>30</sup> i nostri affettuosi saluti a tutti della vostra società letteraria, e credetemi per sempre

V[ostr]o Ob[bligatissi]mo Aff[ezionatissi]mo A[mic]o  
V. Rosi

<sup>29</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 4 – Cat. V»).

<sup>30</sup> Per quanto riguarda il Pandolfi si veda la nota n. 13 dell'introduzione.

5. *Vitale Rosi a Ottavio Gigli, 18 marzo 1846*<sup>31</sup>

Mio Car[issi]mo A[mic]o

Di Spello li 18 Marzo 1846

Eccovi col mezzo da Voi suggerito dal Sig.r Vincenzo Trabalza<sup>32</sup> l'Aritmetica coi noti Sillabarj e il Catechismo del Rosmini. Vi raccomando le firme al mio Corso di Lingua Latina, pel quale vi mando apposito Manifesto. Il compenso quale voi mi esibite per la mia Aritmetica, sarà di qualche esemplare della medesima tirato a parte, se li potrà. Abbiatemi nei vostri pensieri. E pregandovi rammentarmi ai comuni amici, mi confermo e di vero cuore, pregandovi d'una riga di rincontro per quiete.

Ob[bligatissi]mo, Aff[ezionatissi]mo A[mico]

Vitale Rosi

6. *Vitale Rosi a Ottavio Gigli, 27 marzo 1846*<sup>33</sup>

L'insegnamento ha d'uopo d'una riforma; e questo bisogno è sentito universalmente e tanto da esser divenuto una necessità; e per quelli solo nol sarà che vogliono andare in senso retrogrado. Or bene tale riforma è da incominciarsi dai primi elementi di lettura. Dal retto insegnamento viene la rettitudine nel giudicare, e il torto pensare degli uomini nasce ben sovente dal falso modo d'insegnare. In oggi chi v'ha che abbia occhi da vedere e non confessi erroneo il metodo alfabetico? Perché dunque carezzarlo? Se a vincere i pregiudizj non si comincia una volta, questi sempre domineranno. E se col mezzo dei libri popolari non si diffonde una retta norma, qual'altro potrà essere il mezzo? Io per me non do su ciò quartiere; ma Voi farete come più vi piace.

Se il Boggiany presenta una bella distribuzione di materie per lezioni, nel Sillabario Bolognese a capo d'ogni pagina ponete il titolo di lezione o di esercizio col numero progressivo ed avremo il med[esim]o vantaggio. Voi sapete dalla mia precedente per quale de' due sillabari sia la mia preferenza. Se non volete ristampare il XIII. Grado del mio Manuale nello stesso Sillabario per non crescere di troppo quel primo volume che dobbiamo porre tra le piccole mani de' piccioli bambini, potreste ristamparlo in opuscolo separato, intitolandolo Appendice o aggiunta al Sillabario, ovvero Ortopeia ed Ortografia. Quanto alle novelle dite bene esser preferibili quelle del Sillabario Bolognese. Farete assai bene di ristampare il Catechismo del Rosmini. Non conosco il Sillabario del Parravicini<sup>34</sup>, in cui non sarà lieve vantaggio quello di apprendere la lettura

<sup>31</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 5 – Cat. V»).

<sup>32</sup> Vincenzo Trabalza assolveva al compito di distributore in Umbria di libri stampati a Roma. Su «L'Artigianello» (23 gennaio 1847, n. 4, p. 32) è definito «imp. postale» di Foligno e veniva indicato quale rivenditore del citato periodico e dei libri della collana della *Biblioteca delle famiglie*.

<sup>33</sup> *Lettera di tre facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 6 – Cat. V»).

<sup>34</sup> L.A. Parravicini, *Nuovo sillabario italiano fondato logicamente sulle leggi naturali della*

col mezzo della Scrittura; e ne ho provato i buoni effetti in questa mia soppressa scuola di Reciproco insegnamento. Questi mezzi meccanici sono i più sicuri per l'istruzione dei parvoli. Se invece dei tre Sillabarj nella Vostra Biblioteca delle Famiglie, ne figureranno soli due non sarà poi tutto il male del mondo. Nella prefazione peraltro fate conoscere quello proposto dal Ch[iarissimo] Lambruschini e che non si riproduce per sola economia di tempo e di spesa. Le cose del Collegio restano in statu quo; ma non è ancora il tempo di muover passo innanzi. Mi piace che diate opera alla compilazione d'una piccola Pedagogia. Ebbi l'Aporti che dovetti rendere a chi aveva favorito di prestarmelo, e che ora non possiede più. Del Degerando non ho che il Perfezionamento Morale, ossia l'educazione di sé stesso, opera divisa in 6 volumetti e che non credo opportuna pel vostro divisamento<sup>35</sup>. Non so se intendiate parlar di questa. In caso affermativo non avete che a farmene un cenno, perché io ve lo rimetta col noto mezzo. Vi piacerebbe il Saggio di Pedagogia del Dr. Cesati<sup>36</sup> in un assai ristretto opuscolo? La Guida del Lambruschini è un fonte inesauribile<sup>37</sup>. Il mio Articolo sulla Biblioteca delle Madri intitolato=Una Moda senza capriccio= inserito nella Rondinella Strenna Umbra anno 1844 p[agin]a 119 vi potrebbe additare più di un libro in proposito del vostro lavoro<sup>38</sup>.

Conservatemi, amatemi e credetemi per sempre

V[ostr]o Ob[bligatiss]imo Aff[ezionatiss]imo A[mic]o

V. Rosi

### 7. Vitale Rosi a Ottavio Gigli, Spello 18 aprile 1846<sup>39</sup>

Car[issim]o Amico

Poche righe per soddisfare a quanto mi chiedete colla vostra graditiss[im]a degli 8. stante. Vi dico dunque che il primo quaderno di Aritmetica a mente qual'io v'ebbi spedito il di 13 p.p. marzo corrisponde all'incirca alla settima parte dell'insieme dell'opera, mentre gli altri tre quaderni che restano a mandarsi sono più voluminosi quasi il doppio del già spedito. Vi spedisco la Pedagogia del Cesati col solito mezzo. Non ho copia a parte dell'articolo intitolato =Una moda senza capriccio=

Cotesto Sig.r Gioacchino Pompili compilatore della Strenna detta la Rondinella ve ne potrà favorire una copia, se gliela chiederete a mio nome. Col ritornare per mia parte e

*loquela*, Como, 1831.

<sup>35</sup> J.M. Degérando, *Il perfezionamento morale, o L'educazione di se stesso*, Livorno, dalla tipografia di Giulio Sardi, 1831-1832.

<sup>36</sup> Si tratta di Francesco Cesati autore del *Saggio di pedagogia ossia Lettera di Valentino a Teofilo sull'educazione morale intellettuale e fisica dei fanciulli*, Milano, Placido Maria Visai stampatore-libraio nei tre re, 1825.

<sup>37</sup> Si tratta della «Guida dell'educatore», la rivista fondata da Raffaello Lambruschini nel gennaio 1836.

<sup>38</sup> [V. Rosi], *Una moda senza capriccio ossia biblioteca delle madri*, «La rondinella: strenna umbra per l'anno 1844», pp. 119-135.

<sup>39</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 7 – Cat. V»).

del Sig. Pandolfi gli affettuosi nostri saluti sì a Voi che a tutti i vostri amici mi confermo con sincero affetto

Di Spello li 18 ap[ri]le 1846

D[evotissi]mo, Ob[bligatissi]mo Servo ed A[mic]o

V. Rosi

8. *Vitale Rosi a Ottavio Gigli, Spello 26 maggio 1846*<sup>40</sup>

Mio ottimo A[mic]o

Di Spello li 26 Mag[gi]o 1846

Non v'ha dubbio; il miglior sillabario che sia comparso in Italia fino ad oggi quello si è del nostro benemerito Lambruschini. Se non ve lo proposi esclusivamente, la sola sproporzione materiale dei vostri volumetti coll'ampiezza del Sillabario Toscano, mi trattenne dal farlo. Ma avendo Voi trovato il modo di proporzionare l'una cosa coll'altra senza ricorrere al metodo di Procuste, mi piace assai che abbiate fin dalle prime fatto cosa di somma utilità alle future generazioni colla necessaria riforma dell'istruzione letteraria, cominciando col primo anello della catena graduatoria.

In onta però del vostro avvertimento dato saggiamente da Voi ai Sigg. Maestri che devono far uso del vostro Sillabario, questi, usi come sono, alle vecchie abitudini, non vorrei che avessero a pronunciare le consonanti staccate quali esse si trovano alla testa d'ogni serie sillabica. Mi piacerebbe però, che l'avvertimento dato da Voi in oggetto sia reso più sensibile con qualche esempio, dicendo = alla pagina 2. trovasi intestato b B. Il maestro si guarderà bene dal fare pronunciare distaccata da vocale simile consonante, come si trova, ma comincerà subito dall'applicarla alle vocali, facendo dire ai fanciulli bi be ba ecc[etera] Che se il maestro volesse far pronunciare la consonante distaccata dalla vocale, il che involgerebbe qualche difficoltà, si guardi allora dal farla pronunciare nel modo comune e convenzionale, ma col suono naturale, che consiste nella più parte delle consonanti in una preparazione di labbra. Il modo poi, onde il maestro possa, volendo, acquistare la vera pronunzia delle consonanti staccate dalla vocale, quello si è di trovare una parola latina che abbia la terminazione della consonante ricercata e quindi pronunziandola, faccia lo stacco dell'ultima lettera; e così ne apprenderà il vero suono naturale. Così ad esempio: si vuol conoscere la vera pronunzia naturale di S? Si trovi una parola latina che termini con questa lettera, come sarebbe dominus e nel proferirla si stacchi la S da dominu e si accoggerà che la S distaccata per tal guisa non è che un sibilo. Milita lo stesso per tutte le altre consonanti. Così staccando la f da josepf, resterà la f un semplice soffio di labbra. Ma in fine [sic] si conclude che le consonanti non hanno d'uopo d'essere pronunziate isolatamente, ma sempre in congiunzione colle vocali. Se vi piacesse quest'avvertenza, potrete aggiungerla; in caso diverso la tacerete. Ho appreso

<sup>40</sup> *Lettera di quattro facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 8 – Cat. V»).

che la stampa favoritami non è stata ricorretta e che perciò non avete bisogno che io la faccia per Voi. Ma pure a farvi vedere che ho letto il vostro Sillabario vi accenno alcuno degli errori tipografici.

Pagina II. linea 6 ascendendo. Aggiungerei, se il credete opportuno = giusta il detto del celebre Girard: bisogna studiare per essere buoni.

Pag.[in]a III. lin.[ea] 4. del valore in sé stesso, aggiungere quale si è il convenzionale.

Pag.[in]a IV. lin.[ee] 4 e 5. discendendo. Dove sta il che deve esser posto il chi e viceversa.

Pag.[in]a VII lin.[ea] 6. Si sarà voluto dire scompartimenti in luogo di scomparti.

Pag.[in]a 7 linea 2. discend.[endo] na e non ua.

Pag.[in]a 10 lin.[ea] 1. discend.[endo] ca po e non ca' po.

Pag.[in]a 11 lin.[ea] 5. ascend.[endo] paja e non baja.

P.[agin]a 12 lin.[ea] 7. ascend. Vita di anni vi manca forse la parola molti.

Pag.[in]a 13 lin.[ea] 9. Sulla parola bebbe v'è una e rovesciata.

P.[agin]a 16 lin.[ea] 5. discend.[endo] si osservi il cie.

N.B. Cotesto tipografo, avrete già osservato, che omette l'accento su sé pronome, che vi si richiede per distinguerlo dal se quand'è particola condizionale.

Passiamo all'Aritmetica. Questa si sta copiando da varj giorni, e appena terminata vi sarà spedita col solito mezzo. Rammentate di farne tirare a parte alcuna copia per me.

Ho d'uopo della vostra sperimentata amicizia in cosa massima importanza, che deve dar base alla pubblica istruzione di questo infelice paese, alla riapertura del Collegio ed alla fondazione delle Scuole notturne, ed è l'apertura dei concorsi per l'elezione di questi nostri pubblici [sic] maestri. Fin dal primo del corrente si scrisse in oggetto alla S. Congr[egazion]e degli Studi da questo nostro M[onsigno]r Vesc[ov]o ed io ne scrissi in pari tempo al Segretario D[otto]r Capaldi [sic]<sup>41</sup>; ma non si ebbe fin qui verun riscontro. Non so cosa io debba pensarmi di questo silenzio. Voi avete immense relazioni e potrete facilmente conoscere la causa di questa fatale dilazione. In caso di qualche sinistro scriverei in Segreteria di Stato, ed occorrendo mi farei sentire anche dal Papa. In caso disperato rinunziarei [sic] alla carica di primo magistrato e mi ritirarei [sic] in Trevi dove ho una casa del proprio, temendo di restare compromesso nelle conseguenze che potrebbero avvenire sui capi della opposizione; mentre la popolazione è irritata oltremodo, ed io non potrei riuscire a calmare le cose, come ho fatto in passato, in caso di nuove opposizioni al riordinamento delle Scuole e il magistrato che dovesse succedermi, chiunque egli sia, non pagherà più i maestri attuali provvisorj asini e poltroni. Attendo su ciò un vostro rincontro che mi sia di quiete, e di norma, onde stornare il turbine che porterebbe l'ultima rovina sul povero mio paese, divenuto da più anni bersaglio e ludibrio di lupi coperti di pelli d'agnello. Vi saluto, vi abbraccio e sono con tutto il cuore

V[ostr]o Ob[bligatissi]mo Aff[ezionatissi]mo A[mic]o Rosi

<sup>41</sup> Si tratta di monsignor Annibale Capaldi, segretario della Sacra Congregazione degli Studi, tra il 1846 e il 1849 (cfr. *Congregazione degli studi. La riforma dell'istruzione nello Stato pontificio (1816-1870)*, cit., p. LI).

9. *Vitale Rosi a Ottavio Gigli, Spello 8 giugno 1846*<sup>42</sup>

Onorando ed A[mic]o

Di Spello li 8 Giug[n]o 1846

Ho dato una semplice occhiata al Sillabario del Parravicini, di cui avrei voluto veder le tavole, in cui sta il pregio precipuo del suo lavoro, come nell'applicazione pratica delle sue teorie. È cosa prudente di far precedere il vostro a questo secondo Sillabario. Mi piacerebbe però che a suo tempo si pubblicasse anche quest'altro, ch'è molto ben ordinato e graduato con logico intendimento, e che può recare molte pietre all'edificio di un perfetto alfabeto-sillabario, dal quale è d'uopo cominciare la riforma dei metodi scolastici. Quando siasi conosciuto e posto in pratica il vostro, non sarà difficile ad un istitutore il passaggio dall'uno all'altro; giacché in questo secondo del Parravicini si hanno i vantaggi de' due metodi, l'alfabetico e il Sillabario. La sua teoria per la pronunzia staccata della consonante dalla vocale si potrebbe ridurre ad una maggior semplicità e facilità, ma è vero altresì che il suo lavoro può dare ottimi materiali alla riforma d'un alfabeto ragionato e che esclude la più parte se non tutti di quei garbugli antilogici che in vece [sic] d'indirizzare torcono fin dalle prime il raziocinio del fanciullo da farne quelle teste false e matte che non dirado s'incontrano in società, e più che dirigere l'opera di Dio, la mente umana, la guastano, la sformano, la indispongono all'apprendimento. È vero però che un cattivo metodo non giunge sempre a rovinare una mente forte e felice; ma non manca per quanto è in sé di far tutto, perché se non altro, ritardi ne' suoi progressi. Altra ottima direzione nell'insegnamento sillabico, e che io senza nulla sapere del metodo del Parravicini mi trovo di avere portato in tutte le tabelle manoscritte di questa pubblica [sic] scuola di lettura, si è di unire insieme le consonanti raddoppiate, e farne un suono soltanto, battendo fortemente colla voce la consonante doppia, senza attaccarne una colla sillaba precedente ed una colla seguente, come per esempio: pe-tto e non pet-to, fa-tto e non fat-to, te-rra e non ter-ra; mentre se si voglia dare il suono naturale e non convenzionale a terra, riesce ciò impossibile col metodo antico e con quello anche del Lambruschini. Fate dunque che venga pubblicato anche il metodo del Parravicini, come preparativo d'un buon Sillabario. Anche il Professor Troya di Torino ha stampato un sillabario, che io non ho mai potuto vedere. Bisognerebbe [sic] conoscerlo colla speranza di trovarvi buoni materiali per l'oggetto di cui sopra. Ho in ordine un quaderno dell'Aritmetica, ossia una porzione del secondo corso, che unisco all'Alfabeto del Parravicini e ve lo spedisco collo stesso mezzo dal Sig.r Trabalza. L'incaglio portato dalla morte del Papa al riordinamento di queste Scuole, e alla riapertura del Collegio è veramente fatale al bene di questo infelice paese. Ma Voi mi dite che devesi sostare; ebbene abbiamo pazienza sulla speranza di un migliore avvenire. Ma intanto continua il guasto della istruzione e voi scrivevate, che pochi mesi di cattiva direzione scolastica influisce su più generazioni, ne mal vi apponeste. Pregovi di tenermi raccomandato al Masci, al Presidente e tutti gli altri della Letteraria, stimabiliss[im]a V[ostr]a Società, mentre di vero cuore mi confermo con vera stima.

V[ostr]o Ob[bligatiss]imo, Aff[ezionatiss]imo A[mic]o V[ostro]

V. Rosi

<sup>42</sup> *Lettera di tre facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 9 – Cat. V»).



10. *Vitale Rosi a Ottavio Gigli, Spello 20 giugno 1846*<sup>43</sup>

Car[issi]mo Sig.r Gigli,

L'Aritmetica che rimane a Spello sarà circa una metà di quella che trovasi in vostra mano in Roma. A me piacerebbe che si pubblicasse il Sillabario del Parravicini, perché ha delle cose buone per la formazione di uno, che racchiudesse i vantaggi di tutti insieme quelli già conosciuti e da conoscersi in appresso. Che poi si avesse a stampare nella Vostra Biblioteca di famiglia o in libretto separato, sarei su questo indifferente.

Finalmente il vostro presagio sulla sollecita elezione del Pontefice si è avverato. Se siete vero profeta, attendo ora che si avveri l'altra parte della vostra profetica penna, quale si è la riforma degli Studj nello stato e in specie a Spello. Ditemi dunque quali siano gli appoggi delle vostre speranze in questo nuovo pontificato, perché possiamo dare opera ai nostri progetti riguardo agli Studj di Spello. Se avete pertanto notizie consolanti non me le ritardarete. Se approvate questo mio divisamento, vi pregarei [sic] di presentarvi al Segretario Capaldi e conoscere da lui, se possiamo essere consolati sollecitamente sul riordinamento de' nostri studj in Spello, e che se non dispiacesse, ed anzi lo approvasse, avanzarei [sic] una memoria in oggetto al nuovo Pontefice.

State sano; rammentateci a tutti della vostra Società Letteraria; e credetemi quale ho il piacere di rassegnarmi con tutta la stima.

Di Spello li 20 Giug[n]o 1846

D[evotissi]mo, Ob[bligatissi]mo Servo ed A[mic]o V[ostro]

Vitale Rosi

11. *Vitale Rosi a Ottavio Gigli, Spello 29 giugno 1846*<sup>44</sup>

A[mico] Car[issi]mo

Di Spello li 29 Giug[n]o 1846

Si è avuta dalla S[acr]a Congreg[azion]e degli Studj per organo del Vesc[ov]o tuttoche [sic] si bramava sull'impianto del nuovo Magistero per questo Collegio. Perciò sospendete quel passo, che io vi accennava nella mia precedente. Sarò poi in attesa di quanto vi scrissi sulle vostre speranze nel nuovo Sovrano e nel nuovo Ministero.

Qui si dice che tutti i Gonfalonieri si rechino a Roma per fare omaggio al novello Pontefice. Ditemi se ciò sia vero, perché in tal caso, non vorrei restare io solo mentre tutti corrono. Io mi trovo ad avere qualche personale conoscenza col Papa regnante; e perciò quando Voi mi assicurate che la mossa sia generale, moverei anch'io in onta della stagione contraria. In caso poi che la voce sparsa sia falsa, verrei a Roma, ma sempre a migliore stagione.

<sup>43</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 26 – Cat. V»).

<sup>44</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 27 – Cat. V»).

Mi raccomando di pronto rincontro, mentre in fretta ho il bene di ripetermi con sensi veri di stima affettuosa.

V[ostr]o Ob[bligatissimi]mo A[mic]o V[ostr]o

V. Rosi

12. *Vitale Rosi a Ottavio Gigli, Spello 4 luglio 1846*<sup>45</sup>

Car[issimi]mo A[mic]o

Vi torno il Sillabario con le correzioni. Farei un'altra avvertenza pel maestro a questa da collocarsi a piè di pagina per le consonanti raddoppiate. Per esempio alla pag[in]a 17. Nel sillabare la parola nin nolo il precettore non farà pronunciare in due suoni distinti la doppia n, ma farà unire la prima n alla seconda, facendo sì che l'allievo pronunciando batta e calchi con forza le due nn per modo da far sentire il loro raddoppiamento. Altrimenti facendo, cioè secondo la consueta divisione sillabica, il giovinetto inesperto dovrà dire: ninna-nolo in luogo di ninnolo; perciò dovrebbero dividersi le parole seguenti in questo modo: ni-nno-lo, ni-nna-va, na-nna, no-nno ec[cetera]. Intanto si è preferita la di divisione antica alla nuova perché questa verrebbe in contraddizione dell'uso universale di Ortografia. Il maestro peraltro facci unire ogni consonante doppia alla sillaba seguente in luogo di farne servire una alla precedente ed una alla susseguente. Voi dunque mi stimolate a venire? La presente stagione mi spaventa; ma l'amore della patria mi farà risolvere a venire. Saluti senza fine anche per parte di Pandolfi alla stimabile V[ostr]a Società Letteraria. Amatemi e credetemi con sensi di perfetta stima e sincera amicizia

Di Spello li 4 Lug[li]o 1846

Obb[bligatissimi]mo Servo ed A[mico] V[ostro]

V. Rosi

13. *Vitale Rosi a Ottavio Gigli, Spello 8 agosto 1846*<sup>46</sup>

C[aro] A[mico]

Di Spello li 8 Ag[ost]o 1846

Jeri ricevetti lo stampone dell'aritmetica ed oggi ve la rinvio col solito mezzo del Sig.r V[incenzo] Trabalza; ed avendolo perciò letto rapidamente merita una più attenta revisione. Mi piace il sesto a colonna proposto dal Proto, mentre è più economico e più adatto alle lunghe serie di numeri, che altrimenti verrebbero a troncarsi mediante

<sup>45</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 28 – Cat. V»).

<sup>46</sup> *Lettera di due facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 29 – Cat. V»).

le troppo brevi pagine di un altro sesto. A momenti vi farò avere il compimento del secondo Corso. Il terzo corso occuperà un altrettanto di stampa, per quanta ne occupa il primo e secondo Corso. La mia venuta in Roma si è differita al prossimo novembre. Ditemi le speranze che potremo avere dalla tanto desiderata e necessaria Riforma degli Studj. Comunicarete [sic] questi sentimenti all'ottimo V[ostr]o Proto a cui faccio i miei distinti saluti e ringraziamenti del biglietto, di cui mi ha favorito. Sono in attesa del nuovo Sillabario stampato. Senza storpiare un operetta [sic] così utile, quale fu da me sperimentata pel tratto di molti anni nel mio antico Collegio, non potrei sopprimere nulla né delle teorie, né degli esempi pratici nell'Aritmetica. Se non bastano due o tre piccoli volumi, se ne impieghino quattro ed anche più; ma non si mai che io faccia un operazione [sic] contraria al mio intimo convincimento. E lo stampatore mi perdoni, se in ciò non posso, né potrò mai compiacerlo. Perché se ciò facessi rovinerei l'opera per servire alla stampa; come talvolta per servire alla Musica fanno que tali compositori di libretti teatrali, che storpiano la poesia. Quando tornate a scrivere non siate troppo avaro d'inchiostro nel darmi le notizie delle nuove disposizioni d'un Sovrano ch'erige le speranze dei buoni per un migliore avvenire su tutto, e segnatamente sui miglioramenti degli Studj. Abbiatemi in fine qual sempre sarò

V[ostr]o Ob[bligatissi]mo, Aff[ezionatissi]mo A[mic]o

Rosi

14. *Vitale Rosi a Ottavio Gigli, Spello 24 settembre 1846*<sup>47</sup>

Gentiliss[im]o Signore

Le respingo sottofascia il principio della mia Aritmetica, secondo Corso con qualche correzione che vi ho posto.

Sta bene l'uniformità della parola Avvertimento in luogo di osservazione. Trovo giusto che i titoli del Secondo Corso si uniformino a quelli del Primo. Manderò, quando siasi copiato, un quaderno del terzo Corso per empire l'ultimo foglio del secondo volume a stampa; e questo si potrà chiudere con un'avvertenza; e dire, che il corso terzo di Aritmetica verrà compito, allorquando si darà il Corso delle Matematiche Elementari. Non trovo che ridire sulla riforma del Frontespizio. In somma fretta mi ripeto con vera stima di V.S. Ill[ustrissi]ma

Di Spello li 24 settembre 1846

Ob[bligatissi]mo D[evotissi]mo Servo

V. Rosi

<sup>47</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 10 – Cat. V»).

15. *Vitale Rosi a Ottavio Gigli, Spello 18 ottobre 1846*<sup>48</sup>

Car[issim]o A[mic]o  
Di Spello 18 ottobre 1846

Vi mando porzione del terzo Corso d'Aritmetica da servire al compimento del volume secondo di questa facoltà. Si chiude questo terzo corso colla pratica delle 4. prime operazioni semplici, e si riserba il compimento al corso delle Matematiche pure elementari da riassumersi colle Frazioni. Spero che l'originale non eccederà i fogli di stampa; ma quando fosse, non sarà un gran male l'impiego d'un qualche foglio in più. Trattandosi d'istruzione popolare sarà meglio di abbondare, che scarseggiare. In ogni modo mi sarà caro conoscere come sia per riuscire la faccenda.

Coi soliti sensi di perfettissima stima ho il contento di confermarmi con tutto il cuore  
V[ostr]o Ob[bligatiss]mo, Aff[ezionatiss]mo A[mic]o

V. Rosi

16. *Vitale Rosi a Ottavio Gigli, Spello 10 novembre 1846*<sup>49</sup>

C[aro] A[mic]o  
Di Spello li 10 novembre 1846

Gradirei conoscere per quiete, se vi è giunto col solito mezzo l'ultimo mio quaderno di Aritmetica speditovi non ha guari [sic]. Spero che vi siate ricordato del povero Autore di quest'operetta con farne tirare a parte una dozzena [sic] di esemplari. Procurate intanto di spedirmene qualche copia per uso di queste Scuole che vanno ad aprirsi col giorno corrente. So che vi siete immerso in un oceano di grandi affari e tutti vantaggiosi per la società. Evviva! Andiamo innanzi e con coraggio, che i tempi secondano gli uomini di buona volontà. Non voglio distornarvi dalle serie e lodevoli vostre occupazioni; e perciò finisco, abbracciandovi di cuore, il

V[ostro] Ob[bligatiss]mo, Aff[ezionatiss]mo A[mic]o

Rosi

<sup>48</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 11 – Cat. V»).

<sup>49</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 12 – Cat. V»).

17. *Vitale Rosi a Ottavio Gigli, Spello 26 novembre 1846*<sup>50</sup>

Car[issi]mo A[mic]o  
Di Spello li 26 novembre 1846

Non prima di jeri sera alle 5 p.m. ricevetti lo stampone che Voi mi annunciate con la V[ostr]a Graditissim]a dei 21. stante e che io non ebbi se non il di 23. Posso assicurarvi peraltro di non avere ricevuto il d[ett]o foglio a stampa in precedenza, né per conseguenza averlo respinto in Roma senza averlo ricorretto. Si sarebbe voluto scusare presso di Voi un qualche subalterno col dire di avere ricevuto di ritorno la stampa, che non era stata mandata? Si sarebbe forse piccato il Sig.r V[incenzo] Trabalza, per aver'io ricusato di esigere dai miei Spellani il danaro degli abbonati alla Vostra Biblioteca delle Famiglie? Nol vorrei credere. Perché il med[esim]o sa, che ho preferito il perdere le riscossioni al mio Manuale piuttostochè [sic] esigerne l'importare, ripugnando a me il far trasparire ombra di speculazione in cosa la più sacra, quale si è la Riforma della Istruzione elementare, e la preparazione importantissima d'una miglior generazione umana. In ogni modo jeri ebbi il vostro stampone, ed oggi ve lo rimando ricorretto nel miglior modo che mi fosse possibile. Avete ancor provveduto la Gram[matic]a Italiana? Ne avrei una di un mio amico. Il metodo è analitico e veramente Pedagogico; ditemi se vi occorre o no.

Vi ringrazio dell'Aritmetica, come del Sillabario, che dite di avermi spedito con la Diligenza, ma che non ho ricevuto a tutt'oggi.

La Tavola delle unità va posta in fine del libro, e deve essere la prima in ordine colle altre due. Quella delle Frazioni di frazioni dev'essere la terza. Ho fatto accurato esame sulla citazione delle tavole, e tutto mi sembra che stia al suo luogo; ed ho notato ciò che mi sembra errato. Dimenticava dirvi che la Gram[matic]a Italiana che io vi proponeva è breve e adatta al testo della V[ostr]a Biblioteca.

Riveritemi il Proto con tutta la Conversazione del Venerdì. Amatemi e credetemi  
V[ostr]o Ob[bligatissim]o Servo ed A[mic]o

V. Rosi

P.S. Aveva io inpronto [sic] lo stampone pel p.p. giovedì, ma un certo scrupolo mi ha fatto ripassare le stampe e ribattere tutte le operazioni e segnatamente le frazioni, per cui una simile operazione ha portato il ritardo d'un ordinario; e per mancanza di tempo non ho potuto ricominciare [sic] la lettera.

<sup>50</sup> *Lettera di due facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 13 – Cat. V»).

18. *Vitale Rosi a Ottavio Gigli, Spello 30 novembre 1846*<sup>51</sup>

Mio Rispettabile e Car[issi]mo A[mic]o

È da molto tempo che io Vi ho respinto il secondo foglio paginato, come pure coll'ordinario precedente Vi respinsi il terzo in colonne. Non so penetrare il mistero di questo incaglio postale, che non era mai accaduto per l'innanzi. Io non saprei indovinarla. Finalmente ho ricevuto il pacco coi 20. esemplari di Aritmetica e ve ne ringrazio ben di cuore. Ditemi se l'importare delle 10 copie del Sillabario debba io farvelo tenere col mezzo del Sig.r Vincenzo Trabalza, ovvero con altra maniera, che più vi accomodi [sic.]. Datemi anche una decisiva sulla Gram[matic]a Italiana, di cui vi tenni proposito colla mia precedente. Abbiatemi e per sempre qual mi riprotesto con verace rispettoso affetto

Di Spello li 30 novembre 1846

D[evotissi]mo, Ob[bligantissi]mo Servo ed A[mic]o

V. Rosi

19. *Vitale Rosi a Ottavio Gigli, Spello 22 dicembre 1846*<sup>52</sup>

Mio Rispettabile A[mic]o

Di Spello li 22 dicembre 1846

Eccovi un brano della Gram[matic]a Italiana, di che vi tenni proposito nella mia precedente. Siccome l'Autore nell'atto di comporla ne istituiva l'esperimento sui propri allievi, così trovasi il suo originale pieno di cancellature, e bisognoso di un'ultima pulitura per essere pubblicato. A momenti me ne farò tenere altri cinque fogli, quanti forse se ne richieggono [sic] pel primo volume della d[ett]a opera adattato al testo della V[ostr]a Biblioteca. Quando l'avrete esaminata non potrà non piacervi, perché è piaciuto a me, che nutrò sensi uniformi a vostri. Quae sunt eadem uni et tertio sunt eadam inter se. Ditemene dunque a presto il vostro parere; onde l'autore possa continuare il ripolimento [sic] del resto. E vi piacerà conoscerne il nome, mentr'egli è il fratello germano del Car[issi]mo Dot[tor] Pandolfi, maestro attuale in Fabbriano [sic], e che speriamo averlo tra poco a Spello. Non ho veduto altro foglio dell'Aritmetica; perché questo ritardo?

Chi sa che a Febrajo [sic] non ci avremo a rivedere in Roma. Abbiatemi intanto quale ho il contento di ripetermi

V[ostr]o Ob[bligantissi]mo, Aff[ezionatissi]mo A[mic]o

V. Rosi

<sup>51</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 14 – Cat. V»).

<sup>52</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 16 – Cat. V»).

20. *Vitale Rosi a Ottavio Gigli, Spello 22 gennaio 1847*<sup>53</sup>

Mio Rispettabile A[mic]o  
Di Spello li 22 [gennaio] del [18]47

Ho appreso da una vostra stampa la medaglia onorifica che mi viene destinata. Sebbene non siavi premio più bello ad un promotore della pubblica [sic] istruzione da piacere che ne comporta la lusinga di tornare utile in qualche modo alla crescente età della nostra Italia, pure vi ho sommo grado di questo vostro pensiero, perché mi dà novello segno del vostro amore e ve ne ringrazio con tutto lo spirito.

A momenti vi farò tenere qualche altro foglio della Gram[matica]a Pandolfi, che darà schiarimento alle cose che vi potessero sembrare un poco confusette. Conviene però che vi decidiate sulla pubblicazione della med[esima]a perché possa l'autore continuare il ripulimento del suo lavoro, ch'egli ha sospeso fino alla vostra definitiva. I venti esemplari d'Aritmetica di cui mi foste cortese chiamano gli altri venti del secondo volume. La mia venuta in Roma non sarà così sollecita, come avrei bramato.

Vi torno centuplicati gli auguri di felicità pel nuovo anno e a vostro bene e a quello insieme della Società, di che sapeste ottimamente meritare.

Abbiatemi quale con tutto l'animo che mi ripeto

V[ostr]o Ob[bligatiss]imo, Aff[ezionatiss]imo A[mic]o

V. Rosi

21. *Vitale Rosi a Ottavio Gigli, Spello 29 gennaio 1847*<sup>54</sup>

Mio Onorando A[mic]o  
Di Spello li 29 [gennaio] del [18]47

Nella persona del Sig.r Dottor Bragazzi<sup>55</sup> esibitore della presente conoscerete un ottimo amico della Pedagogia, e perciò vostro com'egli è mio; e ritengo che mi saprete ottimo grado di avervi procurato la conoscenza di una persona ottima per qualità di mente e di cuore. Egli si reca in Roma per affari della sua patria e questi relativi alle strade ferrate. A chi meglio dunque che a Voi potrebbe egli indirizzarsi per essere in ciò coadiuvato coll'opera e col consiglio<sup>56</sup>. Ve lo tengo dunque raccomandato quanto più so e posso; ed avrò come fatto a me stesso che possiate operare in suo prò.

<sup>53</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 17 – Cat. V»).

<sup>54</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 18 – Cat. V»).

<sup>55</sup> Giuseppe Bragazzi (1808-1884), scrittore e storico di Foligno, pubblicò anche libri scolastici come gli *Elementi dell'arte logica raccolti da buoni Autori ad uso dei giovani studiosi di filosofia*, Foligno, Tipografia Tomassini e il *Compendio della storia di Fuligno ad uso delle scuole elementari*, Foligno, Tipografia Tomassini, 1858-59. Di lui si conserva un manoscritto intitolato *Di un sistema di istruzione*; cfr. Giuseppe Mazzatinti (ed.), *Inventari dei manoscritti delle biblioteche d'Italia*, Firenze, L.S. Olschki, 1956, p. 65.

<sup>56</sup> Gigli si era interessato della questione delle strade ferrate, pubblicando un *Progetto della*

Ho veduto che il governo si è fatto proprio il vostro progetto sulle strade ferrate. Essendomi io obbligato per un'azione, ritengo che ne sarei sciolto per quindi cedere all'invito de' miei amici in patria pel med[esim]o oggetto. Mi farete perciò cosa gradita, se mi darete sull'emergente un vostro riscontro; o il rinvio della mia firma per mio governo.

Commandatemi [sic] e credetemi con sensi di perfettiss[im]a stima e di sincera obbligazione.

V[ostr]o D[evotiss]imo Servo e A[mic]o Aff[ezionatiss]imo

Vitale Rosi

22. *Vitale Rosi a Ottavio Gigli, Spello 13 febbraio 1847*<sup>57</sup>

Ca[manca]

Vi compiego [manca] [G]ram[atic]a Pandolfi. Il primo foglio staccato contiene gli avvertimenti sull'uso da farsi con vantaggio del libro. Così verrà tolta quella confusione, che vi fu cagionata dalla sola Prefazione. Questo primo fa seguito alla introd[uzion]e che avete già ricevuto. Era del tempo ch'io riteneva sopra del mio tavolino questi fogli con altri appresso. Ora li ho fatti copiare per ogni buon fine. Quando vi decidiate a produrre quest'utilissima operetta nelle V[ostr]a Biblioteca delle Famiglie, favorirete mandare lo stampone, come si è praticato per l'Aritmetica. Io ritengo presso di me l'originale, e perciò non occorre, che mi facciate tenere quest'ultimo ogni volta che mi spedirete gli stamponi. Pentratevi ben addentro di questo lavoro e non potrete disapprovarlo, come cosa d'ultimo gusto in fatto di Pedagogia, e che dà un passo innanzi nel progresso di questa scienza nascente. In ogni modo mi piacerà che vi abbiate a decidere perché l'autore possa dare l'ultima mano al suo lavoro, e prepararlo per la stampa.

Io riterrò sempre presso di me l'originale che farà seguito all'opera; giacché l'autore vuole ch'io vi faccia sopra tutte quelle correzioni, variazioni, ed anche innovazioni che credessi; e concede a Voi stesso quest'amplissima facoltà, da che, posto in non cale il suo amor proprio, ad altro fine non intenda che a quell'unico di rendersi vantaggioso alla crescente età studiosa. Vi saluto, vi abbraccio e sono

Di Spello li 13 Feb[brai]o [18]47

V[ostr]o Ob[bligatiss]imo, Aff[ezionatiss]imo A[mic]o

V. Rosi

*Società Principe Conti e C. i per le strade ferrate nello Stato Pontificio col quale gli utili si dividono a tutto beneficio del popolo*, prima in un articolo su «L'Artigianello», poi stampato in opuscolo dalla Tipografia de' classici sacri in Roma nello stesso 1846.

<sup>57</sup> *Lettera di una facciata* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – senza numero – Cat. V»).



23. *Vitale Rosi a Ottavio Gigli, Spello 11 marzo 1847*<sup>58</sup>

Amatissimo Sig. Gigli

Ricevuta appena la V[ostr]a ultima Graditiss[im]a, feci conoscere al Pandolfi le vostre determinazioni, ed ecco cosa mi viene risposto. Egli vi ringrazia della disposizione in cui siete di pubblicare le sue cose e contento di poter giovare per tal mezzo i giovinetti, ponendo in non cale il suo dispiacere di non potere stampare per intero il suo corso qual'egli lo aveva eseguito, per aderire al vostro desiderio, rifonderà tutto il suo manoscritto per ridurlo a quella brevità che desiderate, conservando lo stesso metodo. Così ne viene di conseguenza che abbisogna qualche altro tempo perché io abbia l'intero originale in mie mani. Egli intanto avvertendomi di quello che farà per questa rifusione, mi dice, che restringerà la prefazione, unendovi gli avvertimenti pel modo di usare il libro, e farà in modo che riesca il volume più breve che sia possibile. Passando quindi all'esposizione degli esercizi, non potendo fare a meno di conservare le spiegazioni, siccome stanno, si contenterà per abbreviare di far l'analisi distesa per un solo esempio lasciandola per gli altri da porsi in minor numero e all'arbitrio del maestro. Toglierà il volumetto che dovea comprendere l'esposizione delle risposte per regola dello stesso maestro, mentre principio giustissimo del Pandolfi si è, che le risposte all'interrogazioni dopo le spiegazioni di ciascun esercizio, debbano compilarli e scriversi in apposito libriccino [sic] dall'allievo dopo la correzione fattane dal maestro; in seguito di che trovi l'allievo compilate le regole grammaticali per opera sua. Toglierà egualmente il volumetto dell'antologia per comporre, ossia si contenterà di porre pochi avvertimenti da servir di norma al maestro, onde condurre gli allievi a scrivere in lingua madre senza presentare la raccolta de' classici esempj da seguirsi, ma indicherà soltanto i libri da consultarsi in oggetto. Questo esercizio del fare scrivere ai fanciulli de' brevi raccontini riesce a meraviglia ed io lo so per prova di fatto proprio per averlo messo in pratica dietro l'insinuazione del Pandolfi. I principianti studiando la Gram[matic]a italiana al terminare di questo studio sono al caso di scrivere correttamente in buona lingua e con qualche eleganza; così ricavano essi il frutto di quello studio che hanno fatto. Questo basterebbe ad un semplice artigiano [sic] che non potesse andare più innanzi; a quelli poi che progrediscono nelle scienze serve mirabilmente, mentre diviene in essi natura lo scriver bene. In onta però di tutti questi tagli che deve far l'autore nel corso di già compito, la riduzione dovrà sempre occupare tre volumetti della V[ostr]a Biblioteca. Io convengo con Pandolfi che in due volumetti non potrà capire se non una Gram[matic]a a esegetica contenente aridi precetti senza metodo, com'oggi si vorrebbe Pedagogico od analitico metodo, di cui trattasi generalizzare la massima nella V[ostr]a Biblioteca. Io convengo egualmente col med[esim]o Sig.r Pandolfi, come ne converrete pur Voi, che le parti dell'orazione devono svilupparsi assai bene, e che lo sviluppo del solo verbo, volendosi fare come si deve, questo solo empirebbe uno de' vostri volumetti. Dunque riepilogando vi dirò, che non dovrete incontrare difficoltà nello stampare un corso di lingua madre col metodo che oggi si richiede dalla sana Filosofia, ed approvato da sommi ingegni, impiegandovi tre volumetti. Vi dirò ancora che mi sembra necessaria una tal

<sup>58</sup> *Lettera di tre facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 21 – Cat. V»).

produzione nella V[ostr]a Biblioteca di Famiglie, come quella che deve più d'ogni altra servire all'uso delle medesime, e stando a questa necessità opinarei [sic] di restringere la seconda parte della V[ostr]a Biblioteca e di ampliare più la prima; giacché de' classici Italiani riboccano le case e le biblioteche, ma si scarseggia assai di libri pedagogici così detti nel rigore del termine. Intanto a servire alle vostre mire meglio del lavoro di Pandolfi non potete trovare, essendo che il mio Manuale colla cui guida è compilato il sud[dett]o lavoro, occuparebbe [sic] almeno otto e più de' vostri volumetti. Per vostro governo il Pandolfi ha già posto mano al lavoro di riduzione, cui presterò mano io stesso, se la vostra risposta sarà analoga al desiderio dell'autore e mio.

Torno ad importunarvi per un numero discreto di esemplari del secondo volume della mia Aritmetica, senza di che mi resterebbe [sic] frustranea la spedizione del primo.

Vi sono grato della notizia onorifica del Ch[iarissimo] Aperti, e ringrazio Voi e Lui dell'incoraggiamento che date al vecchio amico dell'infanzia. In attesa di analogo incontro a quanto so mi confermo con veri sensi di stima e di animo gratissimo.

Di Spello li 11 Marzo [18]47

V[ostr]o Ob[bligatissimo] A[mic]o V[ostro]

V. Rosi

#### 24. *Vitale Rosi a Ottavio Gigli, Spello 28 marzo 1847*<sup>59</sup>

Mio stimabilissimo A[mic]o

Il Sig.r Raniero Pandolfi ha già ritirato la Pref[azion]e dalla Sua Gram[matic]a italiana per riformarla nel modo che piace a Voi. Giacché così volete, io farò precedere una mia lettera all'opera sua. Il med[esim]o ha già dato mano a compendiare il suo lavoro, onde corrispondere alla brevità dei trattati componenti la V[ostr]a Biblioteca.

Il med[esim]o Sig.r Pandolfi si occuperà delle letture graduate per esercitare l'intelligenza e il cuore dei giovinetti, dividendole in tre categorie, tutto a forma del vostro bellissimo ed utilissimo divisamento con note.

L'avermi Voi favorito n.° 20 esemplari del 1° volumetto della mia Aritmetica fa sì che questo primo venga in desiderio di egual numero del secondo, perché non vesti frustraneo e dimezzato il vostro favore.

È già sortita dalla Galilejana la terza edizione del mio Manuale, essendo la seconda di 2000 esemplari esaurita in termine di due anni. Profittando delle vostra benevolenza a mio riguardo sarei a pregarvi, che ne daste un cenno nel Vostro Artigianello, e che mi procuraste il med[esim]o favore dall'Educatore di Roma.

Ebbi ricomprato da un Parroco di Belfiore il V[ostr]o Artigianello dell'anno 1846; ma ne sono privo fin dal Gen[nai]o [18]47. Io non posso rimanere sprovveduto [sic] di una così utile Produzione; perciò fatemi tenere gli arretrati colla continuazione.

Abbatevi coi miei graditi i saluti dei fra[te]lli Pandolfi. Ricordatemi a tutti della stimabilissima e cara V[ostr]a Società del Venerdi.

<sup>59</sup> *Lettera di due facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 20 – Cat. V»).

Commandatemi [sic] e credetemi per sempre  
 Di Spello li 28 Marzo 1847  
 D[evotissi]mo, Ob[bligantissi]mo Servo ed A[mic]o Aff[ezionatissi]mo

V. Rosi

25. *Vitale Rosi a Ottavio Gigli, Spello 6 aprile 1847*<sup>60</sup>

Mio ottimo

L'oggetto della presente si è di chiedervi due esemplari del vostro Sillabario e di dare un socio al vostro Artigianello nella persona del Sig.r Filippo Pierfelici di Terni, giovine studente in mia casa. Sulla spedizione che attendo degli altri articoli mi riporto a quanto vi scrissi coll'ultima mia.

Vi abbraccio e sono con tutto il cuore.

Di Spello li 6 Ap[ri]le 1847  
 Il V[ostr]o Aff[ezionatissi]mo

Rosi

26. *Vitale Rosi a Ottavio Gigli, Spello 25 maggio 1847*<sup>61</sup>

Mio rispettabilissimo A[mic]o

Ho ricevuto l'artigianello per l'anno corrente a tutto il n° 19. Nulla però fin qui ho ricevuto per questo mio alunno Sig. Filippo Pierfelici, che desidera di esservi associato e di avere gli arretrati anche dello scorso anno 1846. Il numero 13. del contemporaneo<sup>62</sup> riporta un ben lungo ed onorifico articolo relativo al mio Manuale di Scuola Preparatoria. Non perché abbia fatto un magnifico non meritato elogio del mio lavoro, ma perché ho appreso della maniera con cui fu steso il d[ett]o articolo, ch'egli tra i pochi maestri è ben addentro penetrato l'estensore in fatto di Scienza Pedagogica poco conosciuta dai più dei maestri nello stato nostro, amarei [sic] di fare la conoscenza epistolare del med[esim] o ch'è un tal Luciano Scarabelli; e così mettere in commercio utilissimo i suoi co' miei pochissimi lumi su tal materia. Non sapendo io peraltro dov'egli sia, non mancherà modo a Voi di darmene contezza colla maggior possibile sollecitudine. Del che non dubitando, ve ne anticipo i sinceri miei ringraziamenti. Ho inteso parlare d'una riforma degli studj nel nostro stato. Sapreste dirmi qualche cosa su tale interessante argomento? Presto, e mi presagisco ancor bene, saranno organizzate le Scuole notturne in Fuligno

<sup>60</sup> *Lettera di una facciata, lacunosa* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 24 – Cat. V»).

<sup>61</sup> *Lettera di due facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 25 – Cat. V»).

<sup>62</sup> L. Scarabelli, *Ai maestri di lingua italiana*, «Il Contemporaneo», n. 13, 1847, p. 3.

[sic]. A voi si deve gran parte di tanto bene nelle provincie [sic] pel miglioramento del povero artigiano, e in conseguenza dell'intera società. Abbiatene i nostri rallegramenti ed obbligazioni insieme. Raccomandatemi alla V[ostr]a Società del Venerdì, ed abb[i]atemi per sempre quale mi pregio ripetermi

Di Spello li 25 Mag[gi]o 1847

Ob[bliatissi]mo, Aff[ezionatissi]mo Servo ed A[mic]o

V. Rosi

27. *Vitale Rosi a Ottavio Gigli, Spello 14 agosto 1847*<sup>63</sup>

Chiariss[im]o ed Amatiss[im]o Sig.r Gigli

Trovassi già in punto la materia pel primo volume sulla Lingua materna. Ora si sta copiando per lasciare presso di me l'originale, su cui dovrà farsi la correzione della stampa, e per non avventurarlo alla posta col pericolo di smarrimento. Nell'atto che vien copiato si dà al M[ano]S[critto] l'ultima politura [sic]; e contate pure di averlo colla scadenza del mese. Tanto in replica alla vostra graditiss[im]a dei 7. stante.

Lo scrivermi che Scarabelli ora trovasi a Firenze e non sapere per quanto tempo, mi fa intendere, ch'egli non sia Fiorentino, e mi pone in curiosità di ricercare qual sia la sua residenza stabile, ovvero la sua patria. Che il Mas[...] fosse un bravo Professore sanitario, un buon [...]erato e miglior poeta estemporaneo io lo sapeva; ma quel ch'io ignorava si è, che fosse ancor profeta. E il suo improvviso [sic], che tolse Rosi per argomento non fu dello un presagio avverato sul conto dei miglioramenti a noi portati da Pio IX. Ditegli tante cose per me e "Venerate l'altissimo Poeta".

Che si fa riguardo alla riforma dell'istruzione pubblica [sic]? Che se ne dice in Roma? Che siavi bene a sperare lo so; ma si comincia a realizzare la speranza? Intendo che si vuol molto in un punto; ma i bisogni sono troppi. Non voglio usurparvi i momenti che sono troppo preziosi per voi, e perciò vi lascio ripetendomi con sensi di verace stima

Di Spello li 14 Ag[ost]o 1847

Ob[bligatissi]mo Servo ed A[mic]o

V. Rosi

P.S. Non potreste fare annunziare in qualche giornale ch'è già fuori la terza edizione del mio Manuale?

<sup>63</sup> *Lettera di due facciate* (b. 15, fasc. 11, Lettera recante il timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – N. 22 – Cat. V»).

28. *Vitale Rosi a Ottavio Gigli, Spello 15 ottobre 1847*<sup>64</sup>

[...]

Di Spello li 15 ottobre 1847

Il Sig.r Dot[to]r Pandolfi ed io con occhio da lince ci ponemmo alla revisione del Manoscritto che vi compiego della Lingua Materna per la vostra e nostra convenienza. E siccome molte cose ci sono occorse che non ci andavano a sangue; così abbiamo rimandati all'autore varj articoli interi, perché fossero rifiuti. Ecco il vero motivo che ha ritardato la trasmissione dell'originale; e sarebbe stato peggio se lo avessimo affrettato. In materiale che si manda serve pel primo tomo. In seguito si manderà il resto pel secondo e terzo. Il secondo volume avrà principio col verbo [...]re.

Se non vorrete o non potrete leggere l'int[ero] manoscritto innanzi di consegnarlo al Proto; legge[te] la prefazione, in cui si parla di certe letture pei bambini, quali voi proponeste per la re[...] al Sig.r Pandolfi. In caso che abbiate mutato s[en]tenza potrete cancellare le linee relative a questo proposito. Vi faccio però conoscere, che senza le letture del Pandolfi sarebbe dimezzata l'utilità della sua Grammatica e per l'esercizio dello scrivere in tenera età si rende necessario questo secondo lavoro.

Sarei già in Roma, se non me lo avesse impedito M[onsigno]r Te[...]to, il quale vuole ch'io prima di muovere di Spello, sia munito di assenso della Segreteria di Stato. Avreste voi un canale sicuro onde conseguire l'intento? In questo lo potreste stendere a mio nome due righe d'istanza facendo conoscere, ch'io ho necessità di comunicare in [...] della cosa seguente coi Superiori maggiori [mutila].

<sup>64</sup> *Lettera di una facciata, lacunosa* (b. 15, fasc. 11, Lettera priva del timbro dell'«Archivio Dott. Ottavio Gigli – Firenze – Cat. V»).



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# The Influence of ideas of J.F. Herbart and the Herbartianism in Slovenia during the Period of the Austro-Hungarian Monarchy

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**ABSTRACT:** This paper is a critical analysis of Edvard Protner's study and interpretation of the impact of ideas of J.F. Herbart and the Herbartianism and their educational consequences in the period of the Austro-Hungarian Monarchy and Slovenia. The original assumptions, knowledge, conceptions and standpoint of the author have been considered, which provide a significant contribution to the study of some general pedagogical questions and problems, such as interpretations of ideas and relations between Herbart and the Herbartianism as well as some specific questions such as the importance, place or the role of the Herbartianism and its impact on the overall pedagogical concept and in particular the segment of teacher education in Slovenia. Based on the analytical and critical approach to these problems, we came to the conclusion that featured historical and pedagogical perspectives and interpretations of context can be significantly beneficial to the understanding of modern ways of teacher development and understanding of teacher's personality.

**EET/TEE KEYWORDS:** J.F. Herbart; the Herbartianism; the Austro-Hungarian Monarchy; Education; Teacher; Slovenia; XIX-XX<sup>th</sup> Centuries.

J.F. Herbart (Johann Friedrich Herbart 1776-1841) had almost always been significant and influential with his pedagogical ideas and fundamentally important in the constitution of pedagogy as an independent science. However, the question is how important are Herbart's ideas nowadays for pedagogical experts when considering problems and conceiving solutions in the educational process. His ideas have a *life* of their own in the history of pedagogy (and specific treatment to this day), but also the followers in terms of educational

direction called the Herbartianism who during the nineteenth century created what was one of the most important and influential movements. It should be noted that due to their inhomogeneity there are various interpretations of Herbart's original ideas, but also of Herbartianism as a pedagogical movement. The interpretation Edvard Protner gives us in his monograph *Educational Consequences in the period of the Austro-Hungarian Monarchy: The Case of Slovenia*<sup>1</sup> is worthy of a special attention and analysis and should be valued for many reasons. First of all, based on the initial access to the monograph, it is clear that the author has two main objectives: to provide an original interpretation and to correct interpretation of the basic postulates of ideas and relationships between Herbart and the Herbartianism; and especially to consider their importance in the Austro-Hungarian Monarchy in Slovenia, a part of the Monarchy then, by analysing their impact within the pedagogical theory and practice i.e. the concept of teacher education. Thus, the name of the study itself fully reflects the aspirations of its main objectives and the importance of the issues in terms of history of pedagogy and schooling. It also reflects the contemporary consideration of numerous fundamental issues and problems in education, and therefore makes it worthy of critical and analytical view.

Based on a deeper analysis, it has been shown that the title of Edvard Protner's monograph was precisely and clearly worded and fully corresponds to its content and scope, but it also surpasses its general perspective in certain segments. The study is 134 pages long, so we think it to be of moderate length, very concise, clear, without unnecessary illustrations, arguments and explanations, but on the other hand very resourceful, interesting, full of useful descriptions, examples, quotations, meticulous analysis and well-grounded arguments. With the *Introduction* (pp. 7-21), the study contains six chapters each fairly balanced when it comes to their length, logically connected and sequenced: 1. *Herbart's University Pedagogical Seminar* (pp. 23-37); 2. *Pedagogical Tact and Personality of the Teacher and the Herbartianist Concept of Educating Teachers* (pp. 39-54); 3. *The Herbartianism in Slovenia until the First World War* (pp. 55-76); 4. *The Education of Teachers in Slovenia and the Application* (pp. 77-91); 5. *The Attitude of Catholic Pedagogues towards Herbartianist* (pp. 93-107); and 6. *The Herbartianism between Normality and Excess in the case of the Lesson Plan Titled The Cat* (pp. 109-119). From the titles of chapters themselves and their content we can conclude that the author considers, not only the analytical methods to describe the impact of the Herbartianism in Slovenia, but also the number of essential issues relating generally to the wider context of Herbart's ideas and the Herbartianism, which produce the added value of the monograph.

<sup>1</sup> E. Protner, *Herbartianism and its Educational Consequences in the Period of the Austro-Hungarian Monarchy: The Case of Slovenia*, Frankfurt am Main, Peter Lang International Academic Publishers, 2014.

It is necessary to emphasize that Protner, as is necessary, logical and essential for the reader, discusses at the very beginning of the study the terminology concerns that are of crucial importance not only for understanding of the monograph, but also of great importance for understanding of Herbart's pedagogical ideas and movements of his followers<sup>2</sup>. In this context, the author/reader *encouragement/agreement* on the substance and use of certain terms in English (Herbartianism) and German (Herbartianismus) is of great importance. One of the indisputably important and interesting general objectives of the author is to offer in his monograph a correct linguistic formulation and understanding of the essence of the Herbartianism movement to English-speaking readers, i.e. to those who speak English only. Protner is well aware that the English language is becoming more and more dominant in the scientific circles and publications; on the other hand, he is also aware that there is a considerable number of German speaking countries for publication in other languages. This is especially true in the studies that consider the impact of the Herbartianism in Austro-Hungary, and Protner himself correctly and properly warns the reader that his presentation and analysis of the impact of the Herbartianism in Slovenia cannot be generalized to the entire Monarchy, "but it's representative enough to help the reader to form an impression of the school in an environment where the whole bureaucratic legislative framework also followed the pedagogic doctrine"<sup>3</sup>. Therefore, having published the monograph in English, the author brings this subject closer to the wider professional audience while at the same time clarifying terminological differences of used terms in different contexts. Moreover, Protner used, reviewed and criticized, among other things, *relevant* Internet sources, such as, for example, a website of the Encyclopedia Britannica<sup>4</sup>. In fact, this is done quite rightly, in a well-grounded and academically appropriate manner, although it would be understandable if he had been sharper in his criticism. He emphasizes negative examples and analyses a number of incomprehensible and totally false representations and explanations of Herbart's ideas and the Herbartianism movement, such as those relating to: the essence and number of educational levels<sup>5</sup> (Wilhelm Rein's views are presented on the site, not Herbart's), formal educational levels designated only for adolescent students, the most profound impact in the United States, etc. Through his monograph Protner proves and is right to point out that most of the errors that appear

<sup>2</sup> *Ibid.*, pp. 7-10.

<sup>3</sup> *Ibid.*, p. 20.

<sup>4</sup> <<http://www.britannica.com/topic/Herbartianism>> (last access: February 2<sup>nd</sup>, 2016).

<sup>5</sup> For example, even in the USA there are many wrong interpretations that claim that according to Herbart there are five educational levels such as: D. Slobodny (ed.), *Early American Textbooks 1775-1900*, Washington, U.S. Department of Education, 1985, p. XII; J. Raber, *Progressivism's Aesthetic Education: The Bildungsroman and the Struggle for the American School, 1890-1920*, Doctoral Thesis, Department of English (Supervisor: Louis Menand), Harvard University Cambridge, Massachusetts, 2014, p. 41.

in many sources of information on Herbart and the Herbartianism are the result of lack of understanding and identification of Herbart's ideas with the ideas of the Herbartianism movement representatives, which he is very keen on distinguishing. This is another reason why Protner insists on understanding the essence of the difference between terms *herbartism* and *herbartianism* founding his views through consideration of a number of primary and secondary sources of literature from the past and present by relevant authorities<sup>6</sup>. The bibliography of the study is balanced, evenly selected, made up of a total of 224 units which are used to support his positive or negative critical analysis and the author's views. Through contemplation of the above mentioned problems related to the substantive and terminological issues, Protner, in a very interesting and phased manner, introduces the reader to the essence of his study correctly pointing out and proposing that the Herbartianism had a particular impact in European countries (e.g. France, England and the Scandinavian countries, but also North America and Japan), but mostly in the German-speaking countries, such as the former Austro-Hungarian Monarchy and Slovenia, where in its specific context he was strongly present and important.

In the context of Slovenia, Protner reasonably and critically questions and denies false perceptions of Herbart's ideas by the local authorities such as Vlado Schmidt<sup>7</sup> and Viktor Bežek<sup>8</sup>, who had significantly contributed to the misunderstanding, simplification and mostly the ill-treatment of Herbart's ideas in educational theory and practice and their identification with the Herbartianism movement until the eighties of the last century. Probably because of that *injustice*, as well as his professional interest in the field of history of pedagogy, Edvard Protner engages himself in studying Herbart and the pedagogical ideas of the Herbartianism movement in his doctorate in the many years to follow, which is apparent from the works of the author used in the preparation of this monograph<sup>9</sup>. The same applies to the author's development

<sup>6</sup> E.g.: F.H. Hayward, M.E. Thomas, *The critics of Herbartianism and other matter contributory to the study of the Herbartian question*, London, Swan Sonnenschein & co., 1903; H.B. Dunkel, *Herbart and Herbartianism: An Educational Ghost Story*, Chicago and London, The University of Chicago Press, 1970.

<sup>7</sup> V. Schmidt, *Pedagogika, III, Skripta Višje pedagoške šole v Ljubljani* [Pedagogy, III, Script Higher pedagogical school in Ljubljana], Ljubljana, Višja pedagoška šola, 1949 (in Slovenian).

<sup>8</sup> V. Bežek, *O formalnih in didaktičkih stopnjah in pa o razvijajoče-upodabljajočem pouku* [Formal and didactic stages and while the emerging-visual teaching], «Popotnik», n. 24, 1903, pp. 1-5, 33-42, 65-73, 134-154, 202-210, 235-246 (in Slovenian); V. Bežek, *Ad interim!*, *ibid.*, pp. 97-104 (in Slovenian); V. Bežek, *Moj odgovor* [My answer], *ibid.*, n. 25, 1904, pp. 1-15, 46-57, 65-75 (in Slovenian).

<sup>9</sup> E. Protner, *Herbartizem v izobraževanju učiteljev na Slovenskem* [Herbartianism in teacher education in Slovenia], Doctoral thesis, Oddelek za pedagoško, Univerza v Ljubljani, Ljubljana, 1998 (in Slovenian); Id., *Herbartov univerzitetni pedagoški seminar* [Herbart's University Pedagogical Seminar], «Šolska kronika», n. 5, 1996, pp. 55-68 (in Slovenian); Id., *Herbartizem na Slovenskem do 1. svetovne vojne* [Herbartianism in Slovenia Until the First World War], «Šolska kronika», n. 7, 1998, pp. 87-110 (in Slovenian); Id., *Nadzornik Anton Maier in*

of pedagogical ideas and education in the Austro-Hungarian Monarchy and Slovenia<sup>10</sup>. So, Protner is one of those<sup>11</sup> who, in the past two decades, seem to do more objective and more intense research on the Herbartianism, especially in the German-speaking countries, and through this monograph obtains more accurate and clearer picture of their work and their impact. This indicates that the author is thoroughly familiar with and continuously engaged in the research of topics covered in his latest monograph. That Protner's work is relevant in the context of the monograph theme for this specific field in the Slovenian and broader European setting with different languages in use is confirmed by the works of other authors<sup>12</sup>. Edvard Protner is a Professor and the Head of the

*formalne stopnje* [The supervisor Anton Maier and formal steps], «Šolska kronika», n. 8, 1999, pp. 16-31 (in Slovenian); Id., *Vpliv herbartizma na reformo osnovnošolskih beril v obdobju pred 1. svetovno vojno* [Impact of Herbartianism to reform primary readings in the period before the First World War], «Sodobna pedagogika», n. 50, 1999a, pp. 16-31 (in Slovenian); Id., *Herbartistična pedagogika na slovenskem (1869-1914)* [Herbartist pedagogy in Slovenia (1869-1914)], Maribor, Slavistično društvo, 2001 (in Slovenian); Id., *Schreinerjev prispevek k razvoju pedagogike in šolstva na Slovenskem* [Schreiner contribution to the development of pedagogy and education in Slovenia], in Id. (ed.), *Delo in pedagoški nazori Henrika Schreinerja* [Work and pedagogical views of Henry Schreiner], Maribor, Univerza v Mariboru, 2002, pp. 71-83. (in Slovenian); Id., *Pädagogischer Takt und Lehrerpersönlichkeit in herbartianischen Konzepten der Lehrerbildung*, in R. Coriand (ed.), *Herbartianische Konzepte der Lehrerbildung: Geschichte oder Herausforderung?*, Bad Heilbrunn, Klinkhardt Verlag, 2003, pp. 205-223; Id., *Das Verhältnis der katholischen Pädagogen zur Herbartianischen Pädagogik auf slowenischem Gebiet*, in J. Hopfner, A. Németh (edd.) *Pädagogische und kulturelle Strömungen in der k. u. k. Monarchie*, Frankfurt am Main et al., Peter Lang, 2008, pp. 103-131; Id., *Die Formalstufen und die „Verdammung“ des Herbartianismus am Beispiel Sloweniens*, in E. Adam, G. Grimm (edd.), *Die Pädagogik des Herbartianismus in der Österreichisch-Ungarischen Monarchie*, Vienna, Lit Verlag, 2009, pp. 113-130; Id., *Volksschullesebuch als Mittel der Etablierung der herbartianistischen Pädagogik in Slowenien*, «Neveléstörténet», n. 7, 2010, pp. 134-143; Id., *Herbartianismus zwischen Normalität und Exzess am Beispiel des Unterrichtsbildes der »Katz«*, in A. Nóbik, B. Pukánszky (edd.), *Normalität, Abnormalität und Devianz. Gesellschaftliche Konstruktionsprozesse und ihre Umwälzungen in der Moderne*, Frankfurt am Main et al., Peter Lang, 2010, pp. 59-71; Id., *La formazione degli insegnanti in Slovenia e l'applicazione 'ragionevole' dell'herbartismo*, in S. Polenghi (ed.), *La scuola degli Asburgo: pedagogia e formazione degli insegnanti tra il Danubio e il Po (1773-1918)*, Torino, Società editrice internazionale, 2012, pp. 241-263.

<sup>10</sup> E. Protner, *The process of the Slovenian pedagogy gaining independence under the Austro-Hungarian Monarchy*, «History of Education & Children's Literature», vol. 10, n. 1, 2015, pp. 601-624; Id., *Wege der Durchsetzung des Herbartianismus: am Beispiel Sloweniens*, *ibid.*, vol. 9, n. 1, 2014, pp. 431-450; Id., *The development of private education regulation in the field of teacher training in Slovenia*, *ibid.*, vol. 8, n. 1, 2013, pp. 17-41.

<sup>11</sup> E.g.: P. Metz, *Herbartianismus als Paradigma für Professionalisierung und Schulreform*, Bern et al., Peter Lang, 1992; R. Coriand, *Karl Volkmar Stoy und die Idee der Pädagogischen Bildung*, Würzburg, Ergon, 2000.

<sup>12</sup> E.g.: Н.О. Федчишин, *Й.-Ф. Герbart и Герbartианство в Европейской истории педагогики* [J.F. Herbart and Herbartianism in the European history of pedagogics], «Science and world», vol. 3, n. 2, 2014, pp. 109-111; R. Kroflič, *Šola – izkustveni prostor socialnega učenja in/oziroma moralne vzgoje* [School – empirical social learning and/or moral education], «Sodobna pedagogika», vol. 53, n. 5, 2002, pp. 42-51 (in Slovenian); K. Skubic Ermenc, *Role of Comparative Pedagogy in Comparative Educational Research*, «Comparative Sciences: Interdisciplinary Approaches», n. 26, 2015, pp. 37-57; etc.

Department of Pedagogy at the Faculty of Arts at the University of Maribor (Slovenia); his key research interests include history of education. From the standpoint of pedagogical science and its disciplines, Edvard Protner's latest monograph represents a specific and qualitative symbiosis of research within the pedagogical areas of General history of pedagogical thought (Herbart and the Herbartianism) and General and national history of schooling (in this case the Austro-Hungarian Monarchy and Slovenia).

Apart from presenting the fundamentally important and successful terminological clarification of basic terms used in the monograph, Protner also clearly presents and defines the Herbartianism movement itself and the differences between its representatives, such as those between K.V. Stoy and T. Ziller. This is of great importance for the analysis of the movement itself as amongst many analysts it also represents, due to its misunderstanding, the cause of many simplifications and significant vulgarization of Herbart's own ideas. As a paradoxical example, Protner rightly points out that «Herbart's pedagogic theory was far more compatible with modern pedagogic efforts than as a theory of dominant (Ziller's) school of thought within the Herbartianism [...]»<sup>13</sup>. Some Herbartians have even practically converted Herbart's ideas into a rigid system that had no substantive reflections in Herbart's original ideas which were closer back then to, for example E. Linde's personalistic pedagogy. Although Protner does not explicitly point it out, we get the impression that he largely blames the Herbartians (in general and those in Slovenia) for the treatment and fate of Herbart's pedagogical ideas, especially from the First World War until the present day. There is a lot of truth in this, but the question is whether Herbart's ideas would have the same, similar or different fate under the changed circumstances and independent of the Herbartianism movement.

Protner thoroughly and exhaustively presents and analyzes the establishment and functioning of Herbart's University Pedagogical Seminar in Königsberg in the early nineteenth century, its relationship with the local educational policy and reforms. He points out as very important Herbart's advocating against too much power, influence and control of the state in the school system (which among other things illustrates the difference to attitudes of many Herbartians during the second half of the nineteenth century and later). He also addresses some of the lesser known Herbart's ideas and attitudes, indicating to some that they are still topical. For example, the author presents an interesting and insufficiently known information about the process of Herbart's Pedagogical Seminar and its mission, i.e. on the one hand, Herbart wanted, «practical implementation of the pedagogical process, which would be linked to and complement general theory. On the other hand, he understood the pedagogical seminar as a centre for the education of future teachers, who in the spirit of his pedagogy would

<sup>13</sup> Protner, *Herbartianism and its Educational Consequences in the Period of the Austro-Hungarian Monarchy: The Case of Slovenia*, cit., p. 12.



exert influence upon the reform of the public school system and education in general»<sup>14</sup>. At the same time Protner points out that besides the fact that Herbart's specific experimental school had an ambition to be important for the professional training of teachers in the didactic-methodological context, it was also substantially focused on the professionalization and development of pedagogical tact and personality of the teacher. The author particularly analyses Herbart's attitude towards public and home education, concluding that Pedagogical Seminar «was neither intended for the training of state nor home teachers, but rather of professionally autonomous teachers»<sup>15</sup>. And in this context, particularly important and interesting are Protner's data and analysis which speak about Herbart's recognition of the role of politics and state in relation to education and teacher's work of which he once warned, and which will later turn out to be, together with some representatives of the Herbartianism movement, a significant cause for ill-treatment and simplification of Herbart's ideas in many countries as well as the Austro-Hungarian Monarchy and Slovenia itself.

The author questions the importance of not only the quality of pedagogical theory in general, but also the possibility of its effective and efficient implementation in practice by teachers. In this context, Protner discusses Herbart's concept of *pedagogical tact* (in which development of reflection and self-reflection, understanding, feelings, judgments, etc. are important, but which are formed only through a specific contact with a child) and within the concept of teacher education by the Herbartianism movement. This question goes beyond the problem of conversion of theory into practice, which Protner rightly points out, but is aimed at Herbart's concept of development of future teachers, not only through the transfer of knowledge, but through the influence on the formation and development of their personality and the key characteristics of an educator (not as a teacher). »The centre of Herbart's aspirations is not the training involved in using educational methods, which enable the teacher a direct influence on forming the child, but the training of educators to identify situations that have an educational effect»<sup>16</sup>. The author supports this statement by numerous Herbart's quotes, i.e. views (conceived in the context of home education) that teachers should develop their personality (primarily as educators), motivate their students with knowledge and behaviour on their path to development, but also have a sense of measure and awareness of the function and position towards himself and the students, the thing that slowly almost disappeared from the Herbartian thought (at Stoy in the context of the school environment, and at Ziller's school lessons and their Pedagogic Seminars). Protner presents and analyses some of Herbart's pedagogical ideas (and the

<sup>14</sup> *Ibid.*, p. 25.

<sup>15</sup> *Ibid.*, p. 35.

<sup>16</sup> *Ibid.*, p. 41.

Herbartianism movement), which when conceived (and still are) were very significant for the concept of teacher education within the framework of the third Austrian Primary School Act from 1869, the most essential and influential in the school system of the Austro-Hungarian Monarchy, and thus also in Slovenia. In doing so the author comes to the conclusion that «in the Herbartianist theory of teacher education, we must distinguish between two dimensions. On the one hand, the Herbartianist pedagogic theory was gradually being established as professional knowledge in terms of the content of teacher education and pedagogic practice. On the other hand, the Herbartianist concept of teacher education was established in the organisational structure of the seminars, i.e. teacher training colleges»<sup>17</sup>. The basic thesis, which Protner confirms, is that Herbartianism certainly greatly contributed to professionalization of the teaching profession until the early twentieth century.

Edvard Protner's monograph has a great value, among other things, because it tried and almost completely succeeded in pointing out the problems of causes and motives of mostly negative perceptions and stereotypes of Herbart's ideas and the Herbartianism movement. «Herbartianism thus has to be judged more objectively; this does not mean that it must be rehabilitated or defended, but its evaluation and scientific judgment ought to be based upon similar criteria as, for instance, modern evaluations of reform pedagogy»<sup>18</sup>. This has so far been almost an unprecedented case in the works of historians of pedagogy. Disinformation, lack of knowledge and objective research on the Herbartianism is what the author shows on the example of Slovenia until the First World War (analysing the period from 1869). It is particularly interesting that Protner has found, through his research of numerous articles, scripts, books, monographs and the like, that the Herbartianism had already been present in Slovenia in the mentioned period, even before it was fully articulated as a theory. The topicality and contribution to exploration of ideas of Herbart and the Herbartianism within Slovenia has been particularly thoroughly analysed by leading pedagogical theorists in the country who with more or less success understood, critically analysed and became aware of the differences between the mentioned pedagogical concepts. Another interesting finding by the author is the fact that when the Herbartianism became the subject of theoretical reflection, a critical attitude towards the movement almost simultaneously appeared, not in the pedagogic circles, but in the Church. Also, Protner came to the conclusion, based on a number of compelling arguments, that in different parts of Slovenia Herbartianism had unequal perception and treatment<sup>19</sup>, which depended less on theoretical concepts and aspirations, specifically understanding and application

<sup>17</sup> *Ibid.*, p. 53.

<sup>18</sup> *Ibid.*, p. 55.

<sup>19</sup> *Ibid.*, pp. 67-68.

of formal education levels, and more on bureaucracy in education which turned them into an instrument of control over the work of teachers<sup>20</sup>.

Considering the education of teachers through the process of establishment and functioning of teacher training colleges since 1869 in Slovenia, Protner highlights and in a versatile way analyses the dominance of the Herbartian pedagogical concept in them. Specifically, he examines not only the problem of analysing Herbartianism through the study of its theoretical basis, but also the opportunities, forms and consequences of application of its postulates in and through teacher associations, conferences, and operation of school supervisors. To illustrate and supplement the stated, Protner analyses the influence of the most important person in education of the time in Slovenia, H. Schreiner, who was the headmaster of the Maribor Teacher Training College and, according to the author, the most important representative of the Herbartianist pedagogy in Slovenia. Through numerous examples Protner demonstrates the importance of his influence in this respect<sup>21</sup>. Moreover, «the Maribor Teacher Training College became the centre of experimental trials of Herbartianist pedagogic theory in Slovenia under Schreiner's leadership»<sup>22</sup>. Through discussion of the impact of Schreiner, the author redefines and highlights the largely positive role Herbartianism achieved in the Slovenian education. By analysing the mentioned example, Protner properly concludes that practitioners of pedagogical theory can check, reconsider and get closer to reality, properly and efficiently, and these activities be well accepted by those who are innovative. The author comes to some significant findings and emphasizes that «together with Herbartianism, Schreiner brought the Slovene environment a new understanding of the professional character of a teacher and strengthened the belief that reaching broad pedagogic and theoretical skill is the basis of school practice»<sup>23</sup>. By doing so, Protner reinforces his aspirations and establishes that it is essential to apply different perspectives in analysing and evaluating the Herbartianism movement itself.

In this regard, the author considers the attitudes of catholic pedagogues towards the Herbartianism, i.e. the possibility of manipulating Herbartianism in the context of its instrumentalization in religious and political purposes through the consideration of disputes between Catholic and liberal pedagogues in Slovenia. Particularly researched and highlighted was the critical attitude of A. Mahnic towards G.A. Linder's textbooks, essentially based on Herbartianism, valued by Mahnic as anti-religious with liberal political background, while fighting for their expulsion from schools. In doing so, Protner realistically and with balance analyses and summarizes the conclusion about Mahnic noting that

<sup>20</sup> *Ibid.*, pp. 73-76.

<sup>21</sup> *Ibid.*, pp. 78-91; See more in Protner, *Wege der Durchsetzung des Herbartianismus: am Beispiel Sloweniens*, cit., pp. 431-450.

<sup>22</sup> *Ibid.*, p. 82.

<sup>23</sup> *Ibid.*, p. 85.

it is «unfortunate that the leading Slovenian intellectual wasted his potential and broad knowledge on a fanatic search for heresy and thus definitely extended the divide between the teachers belonging to the liberal and clerical side»<sup>24</sup>. Otherwise, Mahnic's critical discussions Protner highlights and positions in a broader context, that is, as yet another important confirmation that at that time Herbartianism was the dominant concept in the Slovenian schooling system. However paradoxical and non-comparable, a parallel can be drawn and interpreted as an interesting example: Herbart's and the Herbartianism's pedagogical ideas and Pedagogical Seminars and (probably their biggest competitor in the world in the late XIX and early XX Centuries) J. Dewey's pedagogical concept and the Laboratory School in Chicago experienced similar and unjust accusations in terms of morality and anti-religiousness<sup>25</sup>. A particularly interesting and important result of Protner's research is the one through which he justly argues the importance of Herbart's and Herbartianism's ideas for the establishment and implementation of catechist Munich Method of formal educational levels by Catholic oriented pedagogues in Slovenia<sup>26</sup>. By stating that, the author successfully and diversely demonstrates the importance and pervasiveness of Herbartianism in different and often conflicting concepts of education in Slovenia of that time. The basic thesis which Protner proves in this part of the monograph is the fundamental background of the above, and that is: Herbartianism, in its essence, was once an integral part of liberal school and political strategy so it should be given a positive qualitative connotation<sup>27</sup>.

In doing so, Protner argues that although there are legitimate reasons that contributed to the image of *old school* as stiff, rigid, formalistic and highbrow in Slovenia at the time of the Herbartianism superiority, such a picture is not entirely dependent on the weaknesses of the theoretical concept as is on the need of the state to monitor, control and manage, especially through their school supervisors. As an illustration of this argument, the author analyses the example of realization of the teaching unit *The Cat* evaluating it as paradigmatic with regard to the quality assessment of a class depending on whether, when, how much and in which way a teacher used the formal levels of teaching and the formal sentence on which the former district school supervisor of Ljubljana (the capital of Slovenia) A. Maier<sup>28</sup> at that time insisted. Presenting a completely predicted way of realization of the teaching unit *The Cat*, the author uses it as a representative example in reaching the conclusion of an incredible level of

<sup>24</sup> *Ibid.*, p. 97.

<sup>25</sup> See V. Zorić, *Moral i religija u pragmatizmu Džona Djujija* [Moral and Religion in Pragmatism of John Dewey], «Inovacije u nastavi», n. 2, 2015, pp. 54-66 (in Serbian).

<sup>26</sup> Protner, *Herbartianism and its Educational Consequences in the Period of the Austro-Hungarian Monarchy: The Case of Slovenia*, cit., pp. 102-106.

<sup>27</sup> *Ibid.*, p. 95.

<sup>28</sup> *Ibid.*, p. 113.

banality and nonsense to which education in Slovenia was brought at the time, allegedly under the direct influence of the Herbartianism.

The view that Protner takes in the analysis of his case is focused on the relationship between the pedagogical theory itself, in this case heterogeneous pedagogical movement as was Herbartianism, and the practice itself, i.e. the implementation of such doctrines. He rightly points out that practice may be an objective verification of certain theories, but it can sometimes degenerate due to numerous factors, such as state administrative factors, contexts and practitioners guided by a variety of personal, political and religious interests. These difficulties which the author highlights are recognized as being present in the work of any researcher of Herbartism: in the analysis of the pedagogical movement itself in the theoretical sense, in terms of its diversity, in particular treatment arising from the circumstances in the pedagogical and political changes in many countries and the implementation by the bureaucracy that decides and controls the specific educational policy, and the teachers themselves. We emphasize that the goal of this analytical and critical presentation and discussion of E. Protner's monograph is not to provide a complete, or even an informative insight of the potential reader into the study, but only to display, analyse and evaluate the most important positions and grounds of the perspectives, arguments and the ways in which the author treats the fundamental and most important issues in the subject matter and objectively evaluate the conclusions reached by the author. We believe that the monograph deserves not only a recommendation, but a mandatory consultation during the study or research of topics covered, due to its quality and relevance as well as a rather original approach and concept. It represents a significant contribution to correct interpretation and positioning of the analysed concepts, and also an important and indispensable source of information about the development of teacher education in Slovenia. Edward Protner's study is unique in its content and quality in relation to the research topics and it seems it will easily and quickly become recognized as relevant even outside Europe and find its way to the historians of pedagogy as lecturers and researchers as well as to students.

The following characteristics of the monograph further contribute to its value; smooth and clear style in which it was written, user-friendliness, precision, and expressiveness make its content so interesting. Although, by author's own admission, based on 6 previously published articles altered and revised for the purposes of this study, it forms a compact, meaningful and logically coherent unit which corresponds to the title and fulfils the goals of the research. When it comes to methodology, Protner's study represents an analysis of theory and practice, qualitative, and in many aspects comparative research, with the structure and design of the monograph which appropriately, logically and easily follows the author's assumptions and their verification. The conclusions reached by the author are presented clearly and consistently, in accordance with the research and its realization. Being impartial, valid, complete and connected,

they form a compact and effective unit supported, illustrated and made final by the obtained data so that there is no space for different interpretations.

Researching narrower context of topics covered in Protner's monograph is important for the pedagogy in Slovenia, and the broader context is fundamental to pedagogy in general and new perceptions and correct interpretation of Herbart's ideas and the Herbartianism which the author successfully presents and proves. The author himself points out that «Herbartianist pedagogic doctrine was also accompanied by a very strong critique at the height of its popularity, and with the development of reformist (progressive) pedagogy, this critique only increased. A negative critical attitude towards Herbartianism was typical for a long time in the pedagogic historiography and it is only the last couple of decades that this attitude has gradually begun to change»<sup>29</sup>. Protner's study is particularly significant because it is the only one which, in a very comprehensive, analytical and synthetic way, gives almost all the important information about the impact of Herbart and the Herbartianism on the constitution of teacher education in Slovenia as once part of the Austro-Hungarian Monarchy. The author has exhaustively analysed the didactic principles primarily in the context of their relationship and the importance of teacher's personality. The essence and relation of professional tasks of teachers have also been discussed, their education with wider education and school policy, which allows for specific viewpoint in relation to the understanding of current debates on the professionalisation of teaching profession. By this, Protner allows us to understand the Herbart's ideas and the Herbartianism from one specific angle from which we have not had a chance to analyse them. All this, among other things, speaks of the need and justification of the realized research. However, it will be interesting to see how the professional community will react to certain parts of the monograph relating to the author's view of the relationship of Herbart's pedagogical ideas and the Herbartianism movement and whether the potential reactions of readers will require additional explanations and arguments. In any case, the author's study is a reliable source; it shows scientific foundation of attitudes within the research topics and presents itself as a good basis for contemporary analyses of the relationship between Herbart and the Herbartianism, especially in the context of Slovenia.

The crisis in modern education in many areas is another reason for justifying going back and revisiting the ideas of pedagogical classics, evaluating them without prejudice, political and historical connotations and trying to find in them the universally applicable values, if there are any. Of course, a contextual approach is inevitable, but also the contemporary view from the actual perspective which is always looking for a scientific foundation, correct interpretation and applicability.

<sup>29</sup> *Ibid.*, p. 119.

# «La larga noche de la educación española»

## Il sistema educativo spagnolo negli anni della dittatura franchista

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«The long night of Spanish education». *Reflections on the Spanish education system during the Franco dictatorship*

ABSTRACT: The present work intends to present an overview of the specific characteristics of the Spanish education system during the Franco dictatorship. From the recent and interesting publication *La larga noche de la educación española. El sistema educativo español en la posguerra*, edited by Antonio Francisco Canales Serrano e Amparo Gómez Rodríguez, the author offers a fruitful and stimulating reflection on the role of culture in Spain, and especially of the school and education, during the forties and fifties of the twentieth century (the years of the so-called «primer franquismo»).

EET/TEE KEYWORDS: Education System; History of Education; Francoism; Spain; XX Century.

Il sistema educativo spagnolo visse durante la dittatura franchista un periodo di estremo oscurantismo che relegò il paese iberico in una fase di profonda arretratezza rispetto a molte altre realtà europee. È questa la tesi intorno alla quale si sviluppa il recente lavoro *La larga noche de la educación española. El sistema educativo español en la posguerra*, testo curato da Antonio Francisco Canales Serrano e Amparo Gómez Rodríguez<sup>1</sup>, ventiquattresimo titolo della

<sup>1</sup> A.F. Canales Serrano, A. Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, Madrid, Biblioteca Nueva, 2015.

*Serie Monografías* della prestigiosa collana internazionale *Memoria y crítica de la educación*, diretta da Agustín Escolano Benito. L'interessante volume raccoglie nove contributi di altrettanti studiosi<sup>2</sup> che presentano in maniera molto esaustiva ed opportunamente documentata una feconda e stimolante riflessione su quello che fu il ruolo in Spagna della cultura, ed in particolar modo della scuola e dell'educazione, durante il periodo della dittatura franchista ed in special modo durante gli anni Quaranta e Cinquanta del Novecento (gli anni del cosiddetto «primer franquismo»)<sup>3</sup>. Come efficacemente sottolineato nel capitolo introduttivo dell'opera, *Educación y Franquismo: ruptura e involución*<sup>4</sup>, redatto dai curatori, il regime franchista «mostró desde sus orígenes serios problemas de relación con la cultura» tanto che, nel volgere di un breve periodo «artistas, escritores y creadores de todo tipo marcharon al exilio y el floreciente mundo cultural del primer tercio de siglo, que ha sido conocido como la *Edad de Plata de la cultura española*, fue liquidado por el franquismo sin contemplaciones»<sup>5</sup>. Tali artisti e letterati che lasciarono la Spagna durante la dittatura di Francisco Franco, non furono tuttavia i soli ad essere costretti ad abbandonare la terra iberica ma furono «accompagnati» nel loro esodo, anche da docenti universitari, professori di scuola secondaria e maestri di scuola elementare, a tal punto che il florido e variegato mondo accademico e scolastico esistente negli anni precedenti la guerra finì per essere radicalmente smantellato.

Tutto ciò determinava, come sottolineato da Canales Serrano e Gómez Rodríguez, una perdita incalcolabile per la cultura e per la scienza iberiche nonché per lo stesso sistema educativo spagnolo «con la huida de buena parte de los más destacados pensadores, investigadores y renovadores docentes y con la completa desaparición de algunas escuelas de pensamiento y científicas»<sup>6</sup>. La Spagna dissipava così un ingente capitale umano rappresentato da una

<sup>2</sup> La maggiorparte dei contributi contenuti nel volume sono frutto della rielaborazione delle relazioni presentate dai rispettivi autori in occasione del corso *Educación y franquismo: la educación española de posguerra*, svoltosi presso l'Università della Laguna di Tenerife nell'aprile del 2010.

<sup>3</sup> Con la dicitura «primer franquismo» si intende la prima fase della storia della dittatura in Spagna del generale Francisco Franco, Tale periodo si estende dal 1939 al 1959 e cioè dalla fine della guerra civile spagnola all'abbandono della politica autarchica da parte del regime con l'approvazione del *Plan Nacional de Estabilización Económica* del 1959. Il regime dittatoriale si sarebbe comunque conservato fino al 1975, anno di morte del generale galiziano. Su questo periodo storico del «primer franquismo» si vedano, tra i numerosi lavori pubblicati, in particolare: S.G. Payne, *El primer franquismo. Los años de la autarquía*, Madrid, Temas de Hoy, 1997; G. Sánchez Recio, *El primer franquismo (1936-1959)*, Madrid, Marcial Pons, 1999; C. Barciela López, *Guerra civil y primer franquismo (1936-1959)*, en F. Comín Comín, M. Hernández Benítez, E. Llopis Agelán (edd.), *Historia económica de España. Siglos X-XX*, Barcelona, Crítica, 2010, pp. 331-368; J. Sanchis Sinisterra, *Terror y miseria en el primer franquismo*, Madrid, Catedra, 2013.

<sup>4</sup> A.F. Canales Serrano, A. Gómez Rodríguez, *Educación y Franquismo: ruptura e involución*, in Id. (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., pp. 13-19.

<sup>5</sup> *Ibid.*, 15.

<sup>6</sup> *Ibid.*, pp. 15-16.



brillante generazione che si era formata grazie alle politiche educative dei primi decenni del secolo e che stava dando un contributo determinante alla crescita e allo sviluppo dell'Università e del sistema scolastico iberico: si realizzava in sintesi quella che Luis Enrique Otero Carvajal ha definito la «destrucción de la ciencia española»<sup>7</sup>. Una *tabula rasa* che, tuttavia, come spesso accade nei regimi dittatoriali, fu salutata con entusiasmo dal regime franchista come il felice risultato di una precisa scelta politica che, partendo da una «voluntad inquisitorial», mirava a “rigenerare” la cultura del Paese producendo una netta cesura con «el desarrollo cultural e intelectual del último siglo»<sup>8</sup>.

Il *file rouge* che unisce l'intero volume curato da Canales Serrano e Gómez Rodríguez è rappresentato dunque da questa profonda «involución» culturale ed educativa che avvilluppò la Spagna soprattutto nel corso del primo ventennio del regime franchista, animato unicamente dalla voglia di recuperare quella secolare cultura autoritaria spagnola costituita dalla triade «trono, spada e altare». In special modo, in ambito pedagogico, i vincitori della guerra civile cercarono di recidere ogni rapporto con quelle tendenze che avevano contrassegnato l'evoluzione dell'educazione spagnola tra Otto e Novecento durante tre “momenti” politici assai diversi come la Restaurazione borbonica a cavallo dei due secoli, la dittatura di Miguel Primo de Rivera degli anni Venti del Novecento e la Seconda Repubblica del decennio successivo, con l'obiettivo di cancellare o comunque di creare una decisa cesura con le moderne correnti pedagogiche occidentali degli ultimi due secoli per ritornare a quei modelli educativi in voga nel periodo imperiale cinque-seicentesco. Del resto, più in generale, come opportunamente sottolineato da Carme Molinero nel primo saggio del volume, dal titolo *El Franquismo en el siglo XX español*<sup>9</sup>, che ben ricostruisce le origini del regime di Franco nonché i suoi obiettivi politici e sociali e che pertanto rappresenta un'ottima ed imprescindibile cornice introduttiva per comprendere al meglio gli altri contributi presenti nel testo, uno dei principali demeriti del regime franchista può essere individuato proprio nell'aver determinato «el bloqueo de la trayectoria de modernización, en el sentido más amplio del término, que se estaba dando en España en el primer tercio del siglo XX», facendo sì che «durante los años 40 y 50 las distancias respecto a los países de nuestro entorno aumentaron en el ámbito económico, en el cultural, etc., de manera que

<sup>7</sup> Si veda in proposito l'interessante articolo L.E. Otero Carvajal, *La destrucción de la Ciencia en España. Las consecuencias del triunfo militar de la España franquista*, «Historia y Comunicación Social», vol. 6, 2001, pp. 149-186 ma anche il volume L.E. Otero Carvajal et alii, *La destrucción de la ciencia en España. Depuración universitaria durante el franquismo*, Madrid, Editorial Complutense, 2006.

<sup>8</sup> Cfr. Canales Serrano, Gómez Rodríguez, *Educación y Franquismo: ruptura e involución*, cit., p. 16.

<sup>9</sup> C. Molinero, *El Franquismo en el siglo XX español*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., pp. 23-38.

el crecimiento de los años 60 y 70, en un contexto muy favorable, solo permitió disminuir las distancias aumentadas antes»<sup>10</sup>.

Durante la dittatura di Franco, come ben argomentato in tutti gli altri otto saggi che compongono il volume, il sistema educativo spagnolo rappresentò tuttavia l'ambito che probabilmente risentì maggiormente di questa scelta reazionaria ed involutiva compiuta dalla classe dirigente di tagliare i ponti con la tradizione occidentale degli ultimi due secoli. Per realizzare tale operazione fu necessaria una spietata e scellerata epurazione del corpo docente a tutti i livelli, sia all'interno delle università sia nella scuola primaria e secondaria, come ben illustrato nel saggio di Olegario Negrín-Fajardo, *La depuración franquista del profesorado de los institutos de Segunda Enseñanza*<sup>11</sup>. In tale esaustivo e ricco contributo, dopo la presentazione della ricca bibliografia esistente sul fenomeno dell'epurazione degli intellettuali operata dal regime nell'ultimo periodo della guerra civile e nei primi anni del regime, ci si sofferma ad analizzare più da vicino la difficile situazione vissuta nella scuola secondaria. In particolare l'autore del saggio descrive minuziosamente al lettore la struttura, il funzionamento e la composizione delle cosiddette «comisiones de depuración»<sup>12</sup> alle quali fu affidato il compito di eliminare i soggetti potenzialmente «pericolosi» e costituire così il nuovo corpo insegnante, attraverso l'utilizzo di criteri spesso discutibili atti ad allontanare i docenti dalla cattedra. Nell'ultima parte del contributo, utilizzando una documentazione originale ed inedita, si tratta il caso particolare della provincia di Santa Cruz di Tenerife.

Interamente dedicato alla presentazione di quelli che sono stati i caratteri precipi della scuola spagnola creata dal regime è invece l'interessante e stilisticamente attraente saggio di Salomó Marquès, *La escuela en los años 40*<sup>13</sup>, nel quale emerge sin dalle prime righe il giudizio molto negativo dell'autore sul sistema scolastico iberico durante la dittatura franchista: «Sobre la escuela de los años 40 se pueden decir muchas cosas si se quiere explicar con algún detalle cómo era y cómo funcionaba [...]. Pero también se podría resumir en una sola

<sup>10</sup> *Ibid.*, p. 37. Sull'incredibile boom economico fatto registrare dalla Spagna franchista a partire dagli anni Sessanta, meglio noto come «Desarrollo», si veda in particolare l'ottima ricostruzione offerta in J.M. Serrano Sanz, E. Pardos, *Los años del crecimiento del franquismo (1959-1975)*, in Comín Comín, Hernández Benítez, Llopis Agelán (edd.), *Historia económica de España. Siglos X-XX*, cit., pp. 369-396.

<sup>11</sup> O. Negrín-Fajardo, *La depuración franquista del profesorado de los institutos de Segunda Enseñanza*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., pp. 39-69.

<sup>12</sup> Sull'operato di tali commissioni si veda in particolare, oltre al già citato Otero Carvajal *et alii*, *La destrucción de la ciencia en España. Depuración universitaria durante el franquismo*, anche J.M. Fernández Soria, M. Del Carmen Agulló Díaz, *Maestros valencianos bajo el franquismo: la depuración del magisterio, 1939-1944*, Valencia, Institució Alfons el Magnànim, 1999 e C. Pablo Lobo, *La depuración de la educación española durante el franquismo (1936-1975). Institucionalización de una represión*, «Foro de Educación», vol. 5, n. 9, 2007, pp. 203-228.

<sup>13</sup> S. Marquès, *La escuela en los años 40*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., pp. 71-95.

palabra: *miseria*. Miseria intellettuale, umana, sociale, economica, politica, etc»<sup>14</sup>. Una scuola, quella costruita da Franco e dalla sua classe dirigente, sviluppatasi in seno ad una società nella quale era netto e ben rimarcato il distacco tra «vencedores y vencidos», in cui era necessario innanzitutto cambiare la mentalità degli insegnanti, i maestri in particolare, che proprio per questo furono sottoposti immediatamente, sin dal giugno del 1938, a specifici corsi di formazione che inculcassero loro «los valores de la Nueva España»<sup>15</sup>. Solo grazie a questo nuovo «tipo» di maestro, dedito al sacrificio, alla rassegnazione, all'obbedienza, «más santos que sabios»<sup>16</sup>, avrebbe visto la luce, a partire dalla metà degli anni Quaranta, con la promulgazione della nuova *Ley sobre Educación Primaria*<sup>17</sup>, la «escuela nacional-católica en oposición al modelo republicano»<sup>18</sup>, quella che Marquès molto argutamente definisce la «escuela del NO», pronta a «renegara de la tradición pedagógica realmente existente para regirse por una pretendida tradición española integrista y reaccionaria»<sup>19</sup>. Particolarmente, se non addirittura esclusivamente, attento all'educazione religiosa, civica, patriottica e fisica degli scolari, il sistema scolastico voluto dal regime franchista rifiutava categoricamente: la scuola mista e la «coeducación» di maschi e femmine, fortemente sostenuta invece nel periodo repubblicano, a favore di una netta «separación de sexos» e di una «formación peculiar de niños y niñas en la educación primaria»<sup>20</sup>; il ricorso a testi e teorie pedagogiche di autori stranieri come l'italiana Maria Montessori, il francese Célestin Freinet, lo svizzero Jean Jacques Rousseau o il belga Ovide Decroly, ai quali dovevano essere preferiti il missionario francescano spagnolo del Trecento Raimundo Lulio o il filosofo e umanista iberico del Cinquecento Juan Luis Vives; l'utilizzo di una lingua diversa dal castigliano secondo il principio «una sola patria, una sola religión y, también, una sola lengua»<sup>21</sup>. In tal modo, l'idioma catalano, quello basco e quello galiziano erano dunque assolutamente messi da parte, nonostante fossero espressione di tradizioni ultrasecolari che interessavano un'ampia parte della popolazione.

Anche un altro aspetto, ben documentato dall'eccellente contributo di Antonio Francisco Canales Serrano, *El bachillerato en los años 40: La victoria*

<sup>14</sup> *Ibid.*, p. 72.

<sup>15</sup> *Ibid.*, p. 79.

<sup>16</sup> *Ibid.*, p. 94.

<sup>17</sup> *Ley de 17 de julio de 1945 sobre Educación Primaria*, «Boletín Oficial del Estado», 18 luglio 1945, n. 199, pp. 385-416 (oggi consultabile in <<http://www.boe.es/datos/pdfs/BOE/1945/199/A00385-00416.pdf>> (ultimo accesso: 18 Maggio 2016).

<sup>18</sup> Cfr. Marquès, *La escuela en los años 40*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., p. 84.

<sup>19</sup> Cfr. Canales Serrano, Gómez Rodríguez, *Educación y Franquismo: ruptura e involución*, cit., p. 16.

<sup>20</sup> Cfr. Marquès, *La escuela en los años 40*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., p. 84.

<sup>21</sup> *Ibid.*, p. 86.

*católica*<sup>22</sup>, contribuisce a gettare molte ombre sul sistema educativo propugnato dal regime franchista. Durante gli anni Quaranta, infatti, contrariamente alle politiche educative e agli sforzi sostenuti dai governi del trentennio precedente, Franco e la sua classe dirigente non solo smisero di costruire nuovi centri educativi, ma addirittura finirono per sopprimere direttamente o comunque favorirono la chiusura di molti allora esistenti. Come rivela il lavoro di Canales Serrano, dopo la guerra, infatti, oltre la metà degli istituti di scuola secondaria superiore furono chiusi o condotti a morte lenta poiché considerati «innecesarios a todas luces»<sup>23</sup>, determinando di fatto l'indebolimento se non addirittura lo smantellamento della rete pubblica di scuole ed agevolando, per converso, lo sviluppo dell'insegnamento privato nelle mani dei collegi religiosi. Secondo quanto asserito dall'autore del saggio, infatti, dietro la «paradójica política educativa»<sup>24</sup> franchista vi era la richiesta pressante da parte della Chiesa spagnola che esigeva il controllo dell'educazione come ricompensa per l'appoggio prestato agli insorti durante la guerra civile. Il cattolicesimo spagnolo mirava così a ricondurre il sistema educativo del paese ad uno stadio precedente all'intervento statale, in pratica a quei tempi gloriosi in cui la Chiesa aveva avuto la forza di monopolizzare l'educazione. A conferma di ciò, come ricordato da Canales, già nell'ottobre 1936, e quindi nei primi mesi della guerra<sup>25</sup>, al termine dell'assemblea straordinaria della *Confederación Católica Nacional de Padres de Familia y Padres de Alumnos*<sup>26</sup> celebrata a Burgos, i padri cattolici avevano rivendicato una «rectificación radical» della politica educativa sviluppatasi in Spagna negli ultimi decenni. Secondo gli esponenti cattolici, infatti, era arrivato il momento di restaurare «el espíritu educativo enlazado con la Tradición española» che reclamava di fatto un cambio di priorità in modo che «más que contra el analfabetismo iletrado, hay que ir contra el analfabetismo moral. Y eso no se logra con el abecedario, sino con el catecismo»<sup>27</sup>. In tal modo non si faceva altro che reclamare con forza la ricristianizzazione dell'educazione spagnola, l'efficacia e la validità dei dogmi educativi della Chiesa e soprattutto la necessità di un ricambio consistente del corpo docente, attraverso una «depuración inflexible de sus elementos prostituidos, hasta arrancar de sus

<sup>22</sup> A.F. Canales Serrano, *El bachillerato en los años 40: La victoria católica*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., pp. 97-129.

<sup>23</sup> Cfr. Canales Serrano, Gómez Rodríguez, *Educación y Franquismo: ruptura e involución*, cit., p. 17.

<sup>24</sup> *Ibid.*

<sup>25</sup> La guerra civile spagnola iniziò nel luglio 1936 e terminò nell'aprile 1939.

<sup>26</sup> Tale *Confederación* era sorta in Spagna nel 1929 come organo di coordinamento della varie *Asociaciones de Padres de Familia* che già operavano nei vari territori spagnoli. Per approfondimenti più dettagliati sulla nascita, lo sviluppo e le funzioni di tale realtà associativa si rimanda a G. Redondo, *Historia de la Iglesia en España 1931-1939*, 2 voll., Madrid, Ediciones Rialp, 1993, vol. 1: *La guerra civil (1936-1939)*, pp. 85-190.

<sup>27</sup> Cfr. Canales Serrano, *El bachillerato en los años 40: La victoria católica*, cit., p. 99.

filas a todos los inficionados de marxismo y debilitados de su fé católica y española»<sup>28</sup>.

Al tentativo di riorganizzazione e riforma dell'insegnamento secondario inferiore e dell'insegnamento professionale durante la prima fase del franchismo sono dedicati rispettivamente i dettagliati contributi di José Manuel Alfonso Sánchez (*Ne sutor ultra crepidam. La Iglesia y la reforma de las enseñanzas medias*)<sup>29</sup> e di Patricia Delgado Granados (*Las enseñanzas profesionales en el primer franquismo: tentativas de intervención y repercusión socio-educativa*)<sup>30</sup>.

Nel primo, sulla scia del precedente saggio di Canales Serrano, si analizza, attraverso una larga messe di fonti archivistiche e stampa, il ruolo esercitato dalla Chiesa nella riforma dell'istruzione secondaria durante gli anni Quaranta e Cinquanta del Novecento, cercando tuttavia di evidenziare, e soprattutto dimostrare, come, in primo luogo, all'interno del consesso ecclesiastico non vi fosse una reale uniformità di vedute circa il rapporto di collaborazione venutosi a creare tra la Chiesa iberica e lo Stato franchista e, in secondo luogo, come questo rapporto in realtà non sia stato così idilliaco come «los medios oficiales de información y la mayoría de las investigaciones han dado siempre». In particolare, come sottolineato da Alfonso Sánchez, «quizá sea en la educación donde aparece con más claridad el apoyo del Estado a la Iglesia, pero también donde se confirma que dicho apoyo no fue incondicional, sino muchas veces costoso, con divisiones y enfrentamientos entre los máximos representantes de ambos poderes, religioso y estatal»<sup>31</sup>. Proprio per questo motivo alcuni autori, riferendosi alle relazioni tra il franchismo e la Chiesa hanno preferito parlare di «convivencia conflictiva» in luogo di «perfecta armonía»<sup>32</sup>.

Nel saggio della Delgado Granados, invece, è l'istruzione professionale ad essere posta sotto la lente d'ingrandimento della studiosa. In particolare il capitolo concentra il proprio *focus* sulla totale incapacità del regime franchista di pensare e disegnare un modello di formazione professionale che fosse adeguato ai bisogni del paese. Analizzando in maniera molto attenta e puntuale alcuni tentativi legislativi messi in atto soprattutto nel corso degli anni Quaranta, infatti, come ad esempio la *Ley de Bases de Implantación y Regulación de la Enseñanza Media y Profesional* del 16 luglio 1949<sup>33</sup>, l'autrice riesce a dimostrare come

<sup>28</sup> *Ibid.*

<sup>29</sup> J.M. Alfonso Sánchez, *Ne sutor ultra crepidam. La Iglesia y la reforma de las enseñanzas medias*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., pp. 131-164.

<sup>30</sup> P. Delgado Granados, *Las enseñanzas profesionales en el primer franquismo: tentativas de intervención y repercusión socio-educativa*, in *ibid.*, pp. 165-184.

<sup>31</sup> Cfr. Alfonso Sánchez, *Ne sutor ultra crepidam. La Iglesia y la reforma de las enseñanzas medias*, cit., p. 163.

<sup>32</sup> Si veda in particolare G. Hermet, *Los católicos en la España franquista*, 2 voll., Madrid, CIS/Siglo XXI, 1985-1986, vol. 1: *Los actores del juego político*, pp. XV-XVII.

<sup>33</sup> *Ley de 16 de julio de 1949 de Bases de Implantación y Regulación de la Enseñanza Media y Profesional*, «Boletín Oficial del Estado», 17 luglio 1949, n. 198, pp. 3164-3166.

molto spesso i tentativi del regime di riformare l'insegnamento professionale siano scaduti in semplice retorica «aburrida, rutinaria y desconectada de la vida laboral»<sup>34</sup>. Soltanto a partire dalla seconda metà degli anni Cinquanta ed ancor di più nel corso del decennio successivo si sarebbe assistito ad una vera realizzazione e ad un concreto sviluppo dell'insegnamento professionale, in corrispondenza con la già ricordata apertura economica e politica dell'ultimo periodo del regime di Franco.

All'interno di un volume tanto ben strutturato come quello curato da Antonio Francisco Canales Serrano e Amparo Gómez Rodríguez, trova la sua giusta ed opportuna collocazione anche il saggio di Francisco Morente, *Entre Tinieblas. La universidad española en la larga posguerra*<sup>35</sup>, il cui oggetto della ricerca è rappresentato dall'analisi delle caratteristiche precipue del sistema universitario spagnolo durante la Seconda Repubblica Spagnola e la guerra civile prima, e durante il regime franchista poi. Dopo aver sottolineato i notevoli sviluppi qualitativi compiuti dalla storiografia spagnola in ordine agli studi sulla storia dell'università nel corso degli ultimi venti anni<sup>36</sup>, a partire da un convegno del 1989 avente quale tema proprio l'Università spagnola durante il regime di Franco<sup>37</sup>, l'autore, con estrema dovizia di particolari e con un stile di scrittura molto fluido, ci offre l'immagine di un regime che decise di rompere totalmente con la tradizione scientifica e intellettuale degli anni precedenti, costringendo all'esilio un numero considerevole di intellettuali e docenti di

<sup>34</sup> Cfr. Delgado Granados, *Las enseñanzas profesionales en el primer franquismo: tentativas de intervención y repercusión socio-educativa*, cit., p. 183.

<sup>35</sup> F. Morente, *Entre Tinieblas. La universidad española en la larga posguerra*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., pp. 185-219.

<sup>36</sup> Sulle più recenti linee storiografiche seguite dagli studiosi di storia delle università in Spagna si vedano in particolare: J.L. Guereña, J. Ruiz Berrio, A. Tiana Ferrer (edd.), *Nuevas miradas historiográficas sobre la educación en la España de los siglos XIX y XX*, Madrid, Ministerio de Educación, Cultura y Deporte, 2010, pp. 145-158; L.E. Rodríguez-San Pedro Bezares, J.L. Polo Rodríguez (edd.), *Historiografía y líneas de investigación en historia de las universidades: Europa Mediterránea e iberoamérica*, Miscelánea Alfonso IX, Salamanca, Ediciones Universidad de Salamanca, 2011; ma anche la sempre valida rassegna di studi di C. Rodríguez López, *La historiografía española sobre universidades en el siglo XX. Líneas de trabajo y tendencias historiográficas*, «Revista de Historiografía», vol. 2, n. 3, 2005, pp. 28-41. Attualmente la più valida e completa rivista spagnola interamente dedicata agli studi sulla storia dell'università iberica è «Cuadernos del Instituto Antonio de Nebrija de Estudios sobre la Universidad», giunta al suo diciottesimo anno di vita, pubblicata dalla Universidad Carlos III di Madrid.

<sup>37</sup> Gli atti di quel convegno furono pubblicati in J.J. Carreras, M.A. Ruiz Carnicer (edd.), *La universidad española bajo el régimen de Franco. Actas del congreso celebrado en Zaragoza entre el 8 y 11 de noviembre de 1989*, Zaragoza, Institució Fernando el Católico, 1991. Per una rassegna storiografica completa sugli studi compiuti in Spagna sopra l'università franchista si veda l'esauritivo lavoro di S. González Gómez, *Historia de la Universidad en España durante el franquismo: análisis bibliográfico*, «Educació i Història: Revista d'Història de l'Educació», vol. 26, 2015, pp. 187-212. Della stessa autrice si veda anche S. González Gómez, *Universidad, Franquismo y Transición democrática: charlas con José Luis Peset Reig y Elena Hernández Sandoica*, «Espacio, Tiempo y Educación», vol. 2, n. 2, 2015, pp. 337-354.

spicco dell'epoca e smantellando di fatto quella valida comunità accademica che aveva rappresentato un motivo di vanto per l'intera Spagna durante i primi decenni del secolo.

Quello che però, a giudizio di Morente, aveva reso l'Università franchista estremamente diversa rispetto a quelle dei periodi precedenti, in particolare rispetto a quella dell'età liberale, era soprattutto l'«idea» di Università che il franchismo aveva inteso costruire. E fu proprio in questo processo di creazione di una «nuova Università» che si erano scontrati all'interno del regime, due anime all'apparenza vicine ma che in realtà si erano rivelate concettualmente molto distanti e difficilmente conciliabili: quella dei «falangisti» e quella di coloro che erano soliti essere identificati come «los católicos del régimen»<sup>38</sup>. I primi, infatti, difendevano un modello di Università «nacional-sindicalista», il quale, senza escludere elementi di cattolicità, prevedeva, tra le altre cose, un deciso e diretto controllo statale sulle università, una struttura universitaria caratterizzata da una forte gerarchia (il rettore come «Jefe de la Universidad»)<sup>39</sup>, una rigida selezione ideologica del corpo docente, l'introduzione di un'educazione premilitare e politica per gli studenti nonché la creazione, sul modello fascista italiano, di una Facoltà di Scienze politiche ed economiche<sup>40</sup> destinata a formare la futura classe politica, amministrativa e economica del paese.

Il modello di Università sostenuto dagli teorici e dai pensatori più vicini alla Chiesa cattolica presentava ovviamente peculiarità e sfumature ben diverse. Ad esempio, come sottolineato da Morente, essi auspicavano, in linea con quanto si stava verificando nella vita sociale spagnola, una «recatolización de la universidad»<sup>41</sup>, un ruolo di primo piano per il corpo docente cattolico, un rafforzamento dei contenuti cattolici all'interno dei diversi insegnamenti, il mantenimento delle organizzazioni studentesche cattoliche, la creazione negli atenei pubblici della Facoltà di Teologia, la possibilità di creare università private cattoliche e, non da ultimo, il riconoscimento del diritto di «inspección»<sup>42</sup> in tutte le università da parte della Chiesa.

<sup>38</sup> Cfr. Morente, *Entre Tinieblas. La universidad española en la larga posguerra*, cit., p. 201.

<sup>39</sup> *Ibid.*, p. 202. Si ricalcava in pratica quanto già avvenuto in Germania con la figura del rettore quale *Führer* dell'università nazista. Si veda in proposito H. Seier, *Der Rektor als Führer. Zur Hochschulpolitik des Reichserziehungsministeriums 1934-1945*, «Vierteljahrshefte für Zeitgeschichte», vol. 12, n. 2, 1964, pp. 105-146.

<sup>40</sup> Anche in Italia, durante il ventennio fascista, vi fu un notevole sviluppo della Facoltà di Scienze politiche con la nascita nel 1924 della *Scuola di Scienze politiche e sociali* di Padova, tra le prime in Italia, insieme a quelle di Roma e Pavia, ad essere istituita in una università statale. Si vedano in proposito: D. Bolech Cecchi, *La Facoltà di Scienze politiche dalla costituzione alla riforma (1926-1968)*, «Annali di storia delle università italiane», vol. 7, 2003, pp. 227-248; E. Gentile, *La Facoltà di Scienze politiche nel periodo fascista*, in F. Lanchester (ed.), *Passato e presente delle facoltà di scienze politiche*, Milano, Giuffrè, 2003, pp. 45-85; V.I. Comparato, R. Lupi, G.E. Montanari (edd.), *Le scienze politiche: modelli contemporanei*, Milano, FrancoAngeli, 2011.

<sup>41</sup> Cfr. Morente, *Entre Tinieblas. La universidad española en la larga posguerra*, cit., p. 202.

<sup>42</sup> *Ibid.*, p. 203.

La nuova Università spagnola avrebbe avuto una sua regolamentazione specifica soltanto a partire dalla *Ley sobre ordenación de la Universidad española* del 29 luglio 1943<sup>43</sup> che, seppur di difficile gestazione alla luce del forte contrasto testé ricordato tra le due anime esistenti all'interno del regime, finì per produrre un sistema universitario che si discostò molto da quello esistito nei decenni precedenti e che, senza dubbio, incontrò maggiormente i favori dell'ala falangista del regime più che di quella cattolica<sup>44</sup>. Come sottolineato da Morente, infatti, «la Ley de Ordenación de la Universidad fue, sin duda, una partida ganada por los falangistas; no de una forma rotunda, pero sí de manera amplia y clara»<sup>45</sup>. In estrema sintesi, infatti, la Chiesa non ottenne praticamente nulla di ciò che aveva richiesto o in cui aveva sperato: né di «impregnare» i programmi universitari di cattolicesimo, né di poter creare la Facoltà di Teologia, né di godere di quella sorta di diritto di controllo sull'insegnamento universitario. Ed anche il riconoscimento alla Chiesa da parte dello Stato del diritto di creare proprie università private, si rivelò esistente solo sulla carta dato che per veder sorgere un ateneo privato cattolico nella penisola iberica bisognerà attendere gli anni Cinquanta con la creazione dell'Università di Navarra dietro la forte spinta dell'*Opus Dei*<sup>46</sup>. Al contrario i «falangisti» furono accontentati per la maggior parte delle loro richieste: conquistarono la supremazia pressoché totale nel mondo dell'associazionismo studentesco grazie anche allo scioglimento di tutte le associazioni che riunivano gli studenti universitari cattolici<sup>47</sup>; riuscirono

<sup>43</sup> *Ley de 29 de julio de 1943 sobre ordenación de la Universidad española*, «Boletín Oficial del Estado», 31 luglio 1943, n. 212, pp. 7406-7431 (oggi consultabile in <<https://www.boe.es/datos/pdfs/BOE/1943/212/A07406-07431.pdf>>, (ultimo accesso: 18 Maggio, 2016).

<sup>44</sup> Su questo argomento si è sviluppato nel corso degli anni un intenso dibattito storiografico con posizioni molto diverse assunte dai più importanti studiosi del settore. Per ulteriori approfondimenti si vedano in particolare: G. Cámara Vilar, *Nacional-Catolicismo y Escuela. La Socialización Política del Franquismo (1936-1951)*, Jaén, Hesperia, 1984, pp. 220-231; M. Peset Reig, *La Ley de Ordenación Universitaria de 1943*, in Carreras, Ruiz Carnicer (edd.), *La universidad española bajo el régimen de Franco. Actas del congreso celebrado en Zaragoza entre el 8 y 11 de noviembre de 1989*, cit., pp. 125-158; C. Rodríguez López, *Las universidades españolas en el arranque del franquismo: los años 40*, «Cuadernos del Instituto Antonio de Nebrija de Estudios sobre la Universidad», vol. 5, 2002, pp. 85-126.

<sup>45</sup> Cfr. Morente, *Entre Tinieblas. La universidad española en la larga posguerra*, cit., p. 206.

<sup>46</sup> L'Università di Navarra fu fondata a Pamplona nel 1952 da Josemaría Escrivá de Balaguer, circa 30 anni più tardi rispetto alla nascita in Italia dell'Università Cattolica del «Sacro Cuore» di Milano, che ottenne il riconoscimento giuridico sotto il regime fascista, grazie al R.D. 2 ottobre 1924. Sulla nascita della Cattolica di Milano si veda P. Bondioli, *L'Università Cattolica in Italia dalle origini al 1929*, Milano, Vita e Pensiero, 1929; G. Rumi, *Padre Gemelli e l'Università Cattolica*, «Storia contemporanea», vol. 2, n. 4, 1971, pp. 875-903; M. Bocci, *L'Università Cattolica: il progetto di padre Gemelli*, «Annali di storia moderna e contemporanea», vol. 8, 2002, pp. 9-30.

<sup>47</sup> In Italia, al contrario di quanto accadde in Spagna, la Federazione Universitaria Cattolica Italiana, meglio nota come FUCI, che riuniva gli studenti universitari cattolici italiani, nonostante i rapporti molto tesi con il regime e con i Gruppi Universitari Fascisti (GUF), riuscì comunque a rimanere in vita per l'intero ventennio fascista, seppur limitata nel suo raggio d'azione e costretta, a partire soprattutto dalla seconda metà degli anni Trenta, a dedicarsi principalmente ad attività



a far nascere la tanto agognata Facoltà di Scienze politiche ed economiche; introdussero una milizia universitaria nonché l'educazione premilitare dei giovani studenti; senza dimenticare che il rettore, di nomina ministeriale, aveva l'obbligo di militare nella *Falange Española Tradicionalista*. A partire dalla *Ley* del 1943 e fino alla fine degli anni Sessanta<sup>48</sup>, si realizzò in Spagna il momento di massima centralizzazione delle decisioni attorno al ministero: insegnamenti, durata e articolazione dei corsi, titoli, finanziamenti e nomina delle autorità accademiche erano tutte questioni decise a Madrid. Addirittura anche l'ingresso tra le fila dei professori di ruolo si presentava come un processo molto centralizzato e burocratico: un concorso nazionale in un'unica sessione davanti a una commissione anch'essa di nomina ministeriale.

A completare ulteriormente il quadro offerto dal volume *La larga noche de la educación española* sul sistema educativo spagnolo, contribuiscono senza alcun dubbio anche i due stimolanti saggi conclusivi a firma di Consuelo Flecha García (*La educación franquista y las mujeres*)<sup>49</sup> e di Teresa González Pérez (*La educación de las mujeres en los años 40*)<sup>50</sup>, che introducono anche la prospettiva degli studi di genere nell'analisi dell'educazione durante il «primer franquismo». Le autrici si interrogano in particolare sulle politiche educative adottate dal regime con riferimento alle donne e soprattutto sulla precisa volontà di Franco e i suoi di prevedere per il genere femminile una sorta di educazione «segregada» che isolasse di fatto le donne e impedisse loro di «tomar las riendas de sus propias vidas»<sup>51</sup>. La presenza delle ragazze nelle aule della scuola secondaria superiore, così come il loro desiderio di accedere all'Università, furono visti durante il franchismo con sospetto e diffidenza, «como una pérdida de tiempo carente de sentido el emplearlo en conocimientos innecesarios y nada útiles»<sup>52</sup>. Come ben

spirituali ed assistenziali. Si veda in proposito L. Pomante, «Fiducia nell'uomo e nell'intelligenza umana». *La Federazione Universitaria Cattolica Italiana (FUCI) dalle origini al '68*, Macerata, eum, 2015 (in particolare le pp. 67-217).

<sup>48</sup> Una svolta nella legislazione universitaria spagnola, e più in generale nel sistema educativo nazionale iberico, si ebbe soltanto con la *Ley General de Educación y Financiamiento de la Reforma Educativa* (LGE) del 4 agosto 1970. Grazie ad essa, in piena sintonia del resto con quanto si stava verificando in quel periodo in molti altri stati europei, si tentò di adeguare l'istruzione universitaria ad una domanda di istruzione in espansione e in rapida di trasformazione che avrebbe condotta alla nascita dell'università di massa al posto di quella elitaria dei decenni precedenti. Si veda *Ley General de 4 de agosto de 1970 de Educación y Financiamiento de la Reforma Educativa*, «Boletín Oficial del Estado», 6 agosto 1970, n. 187, pp. 12525-12546 (oggi consultabile in <[https://www.boe.es/diario\\_boe/txt.php?id=BOE-A-1970-1852](https://www.boe.es/diario_boe/txt.php?id=BOE-A-1970-1852)>, (ultimo accesso: 18 Maggio, 2016).

<sup>49</sup> C. Flecha García, *La educación franquista y las mujeres*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., pp. 221-255.

<sup>50</sup> T. González Pérez, *La educación de las mujeres en los años 40*, in Canales Serrano, Gómez Rodríguez (edd.), *La larga noche de la educación española. El sistema educativo español en la posguerra*, cit., pp. 257-291.

<sup>51</sup> Cfr. Canales Serrano, Gómez Rodríguez, *Educación y Franquismo: ruptura e involución*, cit., p. 18.

<sup>52</sup> Cfr. Flecha García, *La educación franquista y las mujeres*, cit., pp. 247-248.

osservato dalla González Pérez, infatti, sin dai primi mesi successivi alla fine della guerra civile spagnola e per lunga parte degli anni Quaranta e Cinquanta, il franchismo, in perfetta sintonia del resto con quanto era già accaduto sotto altre dittature europee<sup>53</sup>, mirò a rafforzare la disuguaglianza di genere e si spese per indicare la vita domestica come luogo ideale di vita per le donne, invitate a svolgere con pazienza e dedizione la loro «profesión de madres y esposas» e a «mantener la «subordinación a los hombres»<sup>54</sup>. Analizzando in particolare la condizione vissuta dalle donne nel territorio delle Canarie attraverso un dettagliato studio sull'attività della *Sección Femenina de la Falange Española Tradicionalista y de las Juntas Ofensiva Nacional Sindicalista*, sorta nel 1934 e in attività fino al 1977<sup>55</sup>, la González Pérez, quasi a riassumere il senso dell'intero volume, asserisce che «la década de los 40 fueron años nefastos para la educación»<sup>56</sup> così nelle Canarie come in tutta la Spagna. Del resto, il discorso educativo rimase un problema complesso ed irrisolto durante tutta l'età franchista, e la modernizzazione e lo sviluppo dell'intera penisola iberica a partire dagli anni Sessanta non furono altro che «un intento desesperado de recuperar el tiempo perdido»<sup>57</sup>.

<sup>53</sup> Si pensi all'ideale fascista della donna italiana che doveva essere soprattutto «moglie e madre esemplare» e che è stata così ampiamente rappresentata dalla letteratura e dalla cinematografia che ha «raccontato» il periodo mussoliniano. Per un'analisi sul ruolo della donna durante il ventennio fascista si rimanda in particolare al fascicolo monografico *Donne e fascismo: immagine e modelli educativi*, «Annali di storia dell'educazione e delle istituzioni scolastiche», vol. 17, 2010. Si veda, infine, anche l'originale e documentato lavoro di S. Vicini, *Fasciste. La vita delle donne nel ventennio mussoliniano con prefazione di Ben Pastor*, Bresso, Hobby & Work, 2009.

<sup>54</sup> Cfr. González Pérez, *La educación de las mujeres en los años 40*, cit., p. 257.

<sup>55</sup> La *Sección Femenina de la Falange Española Tradicionalista* fu sciolta per effetto del *Decreto-Ley* del 1° aprile 1977. Si veda in proposito P. Primo de Rivera, *Recuerdos de una vida*, Madrid, Ediciones Dyrsa, 1983.

<sup>56</sup> Cfr. González Pérez, *La educación de las mujeres en los años 40*, cit., p. 290.

<sup>57</sup> Cfr. Canales Serrano, Gómez Rodríguez, *Educación y Franquismo: ruptura e involución*, cit., p. 18.

## Fare pedagogia a Trieste (1960-2010)

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### *Making pedagogy in Trieste (1960-2010)*

**ABSTRACT:** Through the analysis of the recent work *Pedagogia, psicologia, figure, scuola e territorio nella Trieste della seconda metà del Novecento*, edited by Claudio Desinan, this article will focus its attention on the history of the Faculty of Education in Trieste which represented a specific pedagogical experience as the intersection between teaching, educational practices and support for the training of teachers.

**EET/TEE KEYWORDS:** History of Education; History of Pedagogy; Higher Education; Italy; XX<sup>th</sup> Century.

Per circa mezzo secolo – tra gli anni '60 e l'inizio del nuovo secolo – si è sviluppata presso la Facoltà di Magistero (poi di Scienze della Formazione) di Trieste una singola esperienza pedagogica maturata all'intersezione tra insegnamento, pratiche didattiche e sostegno alla formazione di docenti. Ne sono stati protagonisti i docenti che, con varie competenze (pedagogiche, storico-educative, didattiche, psicologiche), hanno costituito quello che essi stessi hanno definito il Gruppo della ricerca in Scienze dell'educazione dell'Istituto (poi ex) di Pedagogia: studiosi di più antica militanza come Giorgio Tampieri, Enzo Petrini e Duilio Gasparini e altri che via via si sono aggregati nel tempo (Claudio Desinan, Bianca Grassilli, Loredana Czerwinzky Domenis, Gianfranco Spiazzi, Silvano Pezzetta, Annamaria Griselli ed Elena Valenti).

Un recente e denso volume dal titolo *Pedagogia, psicologia, figure, scuola e territorio nella Trieste della seconda metà del Novecento* curato da Claudio Desinan<sup>1</sup> – il principale custode di questa esperienza – ne ricostruisce i passaggi salienti, tra autobiografia, memoria e ricostruzione storica. Il volume è articolato in tre parti. Nella prima vengono presentate le biografie dei principali protagonisti del Gruppo. Attraverso di esse è possibile identificare

<sup>1</sup> C. Desinan (ed.), *Pedagogia, psicologia, figure, scuola e territorio nella Trieste della seconda metà del Novecento*, Trieste, EUT, 2016.

la base educativa comune e gli apporti specifici di ciascun componente. La seconda parte è dedicata a illustrare i rapporti tra il Gruppo e i vari soggetti istituzionali e associativi con cui nel corso del tempo sono state stabilite relazioni di partenariato. Una terza e conclusiva sezione propone una rassegna sulla scuola triestina nella seconda metà del secolo scorso e alcune riflessioni sullo snodo tra passato e futuro delle Scienze dell'educazione in terra giuliana.

Una considerazione preliminare merita l'impianto metodologico che ha guidato Desinan e gli altri autori nella stesura dei saggi. Gli scritti si svolgono con il proposito di inquadrare la memoria autobiografica all'interno di una storia locale. Si tratta di un approccio interessante. Le narrazioni ricostruite attraverso la diretta testimonianza dei protagonisti – quando non si esauriscono nell'aneddotica memorialistica – propongono in genere con vivezza l'intreccio tra le linee di ricerca e le vicende, le passioni di uomini e le loro relazioni. Esse non raramente offrono squarci rappresentativi, integrando «dal basso» le analisi di carattere generale nelle quali talora si rischia di lasciare da parte le persone a vantaggio della ricostruzione dei dibattiti politici, dell'applicazione delle norme giuridiche, dell'esame dei dati statistici e dei parametri economici.

Il volume costituisce perciò, al di là dell'immediatezza biografica e autobiografica, un utile tassello della storia scolastica e pedagogica del secondo Novecento.

La lettura del volume va infatti contestualizzata nelle trasformazioni che hanno segnato lo scenario scolastico degli ultimi decenni: l'emergere di una pedagogia più disponibile ad aprirsi verso la ricerca empirica e l'intrecciarsi sempre più fitto di psicologia dell'educazione, pedagogia, didattica generale e didattiche disciplinari; il passaggio dalla scuola selettiva alla scuola aperta a tutti; la diffusione della cultura educativa dell'inclusione aperta al riconoscimento della diversità, alternativa e opposta a modelli scolastici centrati su prassi omologanti; la transizione, operata soprattutto dietro la spinta delle psicopedagogie d'oltre Oceano, verso pratiche più attente all'apprendimento che all'insegnamento; un'attenzione crescente alle didattiche disciplinari.

I componenti del Gruppo triestino sfuggono alla trappola dell'*aut-aut* altalenante tra chi ha continuato a coltivare la pedagogia lungo i sentieri filosofici e politico scolastici (con derive talora ad alta intonazione ideologica) e, chi, invece, ha sfumato la pedagogia nelle scienze dell'educazione, interpretandola nel senso di una marcata empiria. Essi optano invece per l'*et-et*, valorizzando la dimensione «pratica» – nel senso aristotelico dell'espressione – dell'agire educativo nel quale sempre e inevitabilmente agiscono teoria e prassi.

Questa scelta poggia su varie motivazioni: l'origine scolastica di quasi tutti gli esponenti del gruppo; la convinzione che l'innovazione non andava affidata soltanto ai risultati sperimentali di tipo laboratoriale, ma – come si direbbe oggi – piuttosto alla replicabilità delle buone pratiche e la loro diffusione; la convinzione soprattutto che la scuola costituiva una prova sfidante per la pedagogia nel passaggio da scuola selettiva a scuola aperta a tutti.

La bussola orientativa definita nei suoi tratti essenziali dai promotori del Gruppo ha rappresentato un patrimonio duraturo, solidamente ancorato a una visione umanista e cristiana dell'essere umano e della società ricompresa entro le categorie del personalismo. I punti di riferimento furono in prevalenza i pedagogisti neo tomisti – Dèvaud, Casotti, Chizzolini, Agosti e soprattutto Maritain – coltivati negli ambienti bresciani. Proprio in quel contesto avevano mosso i primi passi gli iniziatori del Gruppo, Enzo Petrini (1916-2008) e Duilio Gasparini (1923-2008), anche se i loro itinerari si erano poi diversificati.

Petrini, dopo le giovani esperienze bresciane era cresciuto alla scuola nutrita di cultura classico-umanista di Giovanni Calò, uno dei più severi critici dell'idealismo gentiliano cui rimproverava di muoversi «nelle nuvole». Secondo Petrini una volta definito il «dove» e il «perché» era necessario stabilire il «con che cosa» ed «in che modo». Nella perenne dinamica «tra essere e dover essere», tra momento iniziale e momento perfettivo dell'essere, la pedagogia non poteva non impegnarsi anche nel «fare».

Fu facile l'intesa con Duilio Gasparini che si era dedicato, come maestro e poi come direttore scolastico, a un'intensa attività di innovazione didattica i cui frutti raccolse in un volume del 1968, *Prospettive teoretiche della didattica*. La lettura di Bruner intrecciata con tracce di cultura lombardiana letta attraverso Agosti lo spingeva a guardare alla scuola non solo come a un luogo di «scoperta» e di appropriazione dei contenuti disciplinari, ma anche come a un'esperienza aperta alla vita vissuta.

Per entrambi gli studiosi non c'era un metodo in grado da produrre effetti o – se si preferisce – c'erano tanti metodi sulla carta efficaci ma non automaticamente in grado di garantire effetti positivi se non c'era un insegnante adeguatamente attento e volenteroso che sapesse servirsene in modo appropriato. Un tema presto destinato a rappresentare il *focus* forse principale della riflessione e dell'impegno attivo del gruppo.

Il terzo socio fondatore del Gruppo fu lo psicologo Giorgio Tampieri. Gli originari interessi legati ai processi percettivi degli adulti si spostarono su quelli specifici dei bambini, associandosi alla coltivazione delle tematiche proprie dello sviluppo mentale in costante riferimento alla lezione di Jean Piaget e al possibile impiego didattico della teoria degli stadi nel senso suggerito da Guido Petter, promotore, come è noto, di quella che si potrebbe definire l'interpretazione pedagogica di Piaget.

Non fu difficile per Tampieri approdare ai temi scolastici, intrecciando gli apporti psicologici con quelli pedagogici e didattici, entrando con grande sensibilità nelle questioni educative e scolastiche fino a poterlo definire uno psicologo «in situazione», attento ai problemi della scuola, della formazione degli insegnanti, della professionalità docente, convinto che lo studio scientifico doveva essere sempre di vantaggio sia per la scuola sia per la società.

Claudio Desinan ricorda come lo stile di lavoro del Gruppo fosse «fluidico e liberale». Era comune la convinzione che la formazione dei giovani doveva

essere fondata su una scuola della cultura, costruita sui principi valoriali della democrazia, della libertà e dell'umanizzazione. Era regola di tutto il Gruppo il confronto tra diverse ipotesi di innovazione che comparivano all'orizzonte con il doppio obiettivo di alimentare la ricerca pedagogica e di arrivare a conclusioni che assicurassero maggiore solidità alla pratica educativa e didattica. Il presupposto era che una scuola di tutti doveva guardarsi da ogni forma di «apriorismo ideologico» e puntare sempre «sull'essenza dell'insegnamento».

Argomenti comuni che cementarono il Gruppo furono non solo l'idea di pedagogia ancorata alla realtà per quanto nutrita di solidi agganci filosofici, scientifici e storici, ma soprattutto l'indagine sul rapporto tra fini, metodi e mezzi, sull'importanza della relazione educativa, sulla necessità di non procedere ad un'accettazione passiva dell'innovazione in quanto tale. La prospettiva pratica dell'agire educativo poggiò su una lettura e interpretazione mai conclusa della nozione di «persona» alla quale, ancora riprendendo alcune annotazioni di Desinan, doveva essere ricondotto ogni aspetto del processo educativo, concetto mai esaurito nel quale «si riverbera l'immensità dell'educazione da esplorare continuamente perché sempre esposta alla comparsa di aspetti, motivi e movimenti sempre nuovi».

In tal senso, ad esempio, fu concepito il passaggio alla scuola del tempo pieno, una scuola che con tempi più dilatati doveva rappresentare, come indicava Petrini, una «scuola della piena educazione» e non solo un'istituzione di sostegno sociale di genitori lavoratori e tanto meno come una scuola vissuta all'insegna di una ideologia (una «scuola di sinistra»). Il tempo pieno doveva «dar vita ad una scuola di cultura, aperta da un lato verso la famiglia dall'altro verso la società e la vita». Per Petrini questa novità era importante, perché un tale modello di scuola rappresentava il collegamento mancante tra istituzioni scolastiche e formazione permanente e poteva diventare la base per un potenziale educativo di grandi prospettive.

Il richiamo alle discussioni sul tempo pieno porta a fare almeno cenno ad alcuni altri provvedimenti legislativi come l'avvio dei decreti delegati del 1974, le nuove modalità di valutazione degli alunni del 1977, i programmi per la scuola elementari del 1985 e la creazione dei moduli e il superamento del maestro unico del 1990, gli orientamenti della scuola materna del 1991. Su queste tematiche il Gruppo non esitò a segnalare nella normativa che riscriveva le caratteristiche dell'istruzione obbligatoria incongruenze, semplificazioni, schematismi e a rivendicare una scuola ispirata a principi di libertà, non subalterna a ideologie pedagogiche, fondata sulla professionalità dei docenti e coerente con lo spirito della Costituzione.

Nel ripensare la scuola degli anni Settanta e Ottanta (nel linguaggio del Gruppo nel «riscolarizzare la scuola») per renderla in grado di rispondere a nuove esigenze culturali e formative il Gruppo triestino orientò molte risorse, già se n'è fatto cenno, verso la formazione degli insegnanti. Non bastava aprire la scuola a nuove tecnologie – che in quegli anni erano la televisione e i primi

computer – o a nuove pratiche didattiche legate alla dilatazione del tempi scolastico, occorreva puntare anche e soprattutto sulla qualità didattica e sulla capacità dei docenti di stabilire buone relazioni intersoggettive. Questo intento fu perseguito a vasto raggio come viene documentato nel volume dai contributi di enti e istituzioni che hanno collaborato prima con la Facoltà di Magistero e poi con quella di Scienze della Formazione.

La strategia di puntare sulla professionalità docente costituiva un orientamento in controtendenza rispetto alla prevalente attenzione riservata in quegli anni alla messa a punto di metodi di apprendimento sperimentali dai protocolli deterministici, come accadeva in larga parte della cosiddetta «pedagogia per obiettivi» (da Skinner a Bloom, dal *mastery learning* alle teorie curricolari) che stava entrando a vele spiegate anche in Italia. Secondo gli studiosi triestini l'apprendimento non poteva rappresentare un tema a se stante, ma andava incrociato con l'insegnamento e il mediatore tra i due elementi era proprio l'insegnante.

Dietro l'analisi di Bianca Grassilli la didattica era invitata a rinunciare ad essere una disciplina normativa, ma era stimolata a mettersi su di una strada più ricca e problematica: su questi presupposti trovarono largo impiego modalità formative basate sulla ricerca-azione, sulla capacità riflessiva e sull'analisi qualitativa in grado di «cogliere il complesso, il particolare, la diversità, l'irripetibile» della gestione della classe.

Convinzione motivante era che l'insegnante non agisce e non decide solo utilizzando le conoscenze che egli deriva dalle teorie da lui conosciute, ma anche e spesso soprattutto sulla base della propria esperienza e cioè «di come ritiene che le cose funzionino e riescano con successo». La forza regolatrice dell'esperienza e il contestuale rifiuto delle soluzioni prefissate furono perciò i cavalli di battaglia del Gruppo.

La centralità assegnata al tema della formazione degli insegnanti si pose all'intreccio di varie questioni non solo di stretta pertinenza didattica, ma di respiro generale come, ad esempio, la già ricordata novità del tempo pieno, la continuità tra i diversi ordini scolastici, il passaggio dal maestro unico alla pratica dei moduli e la gestione dell'integrazione dei soggetti handicappati (oggi si preferisce parlare di inclusione educativa della diversità). Quest'ultimo tema di per sé assai complesso si manifestò con toni roventi in specie a Trieste ove in quegli anni operava Franco Basaglia, il promotore del processo innovativo che stava interessando l'intero mondo della psichiatria italiana ed europea.

Ben presto si stabilì l'equazione: se il manicomio non cura, nemmeno le scuole e le classi speciali sono efficaci e gli alunni vanno inseriti nelle classi normali. Era viva la convinzione che le esperienze della socializzazione, il nuovo ambiente ed i contatti con i coetanei, la partecipazione ad una vita e ad attività didattiche comuni avrebbero costituito un beneficio immediato e naturale in tutti i casi trattati che non aveva paragone con gli scarsi risultati ottenuti con gli estenuanti esercizi sul deficit praticati negli Istituti speciali, dove

invece i soggetti erano in contatto con bambini uguali a loro, se non addirittura peggiori. Perché questo disegno si potesse realizzare occorreva disporre di docenti adeguatamente preparati e di un congruo tempo di rodaggio.

L'azione del Gruppo triestino si orientò a scongiurare il rischio del cosiddetto «inserimento selvaggio» dell'handicappato senza una proposta didattica e metodologica confacente, in vista di un graduale processo di integrazione affidato a maestri nel frattempo preparati. Il libro documenta la varietà delle azioni intraprese in tal senso da Tampieri, Desinan, Grassilli, Valenti e in modo speciale da Loredana Czerwinsky Domenis distribuite lungo circa un ventennio. Queste innovative prassi didattiche miravano ad ottenere un'azione educativa finalizzata alla crescita interna del soggetto diverso e si distinguevano dalle pratiche di quanti si limitavano a un'azione addestrativa d'impianto comportamentistico.

Dall'insieme del volume emerge che il Gruppo triestino restò sempre ben lontano dagli approcci funzionalisti a vantaggio di uno stile pedagogico centrato piuttosto sulla valorizzazione delle potenzialità umane. Gli autori che ricorrono nelle pagine dei componenti il Gruppo confermano questa linea interpretativa: più Maritain di Dewey, più Bruner di Skinner, e inoltre Piaget, Vigotskij, Morin, i maggiori cultori della didattica italiana, da Scurati a Frabboni, a Laeng.

In conclusione si può dire che la presenza degli studiosi dell'ex Magistero triestino appare segnata soprattutto dalla volontà di accompagnare i cambiamenti su una linea gradual-riformista fatta di grande senso pratico, senza cedimenti utopici, con la consapevolezza che non sono le formule fortunate dei pedagogisti più *à la page* a giovare alla scuola, agli allievi e alle famiglie, ma il lavoro serio e quotidiano degli insegnanti.



# *Il romanzo d'un maestro* di Edmondo De Amicis: le ragioni della sua recente riscoperta

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The romance of a schoolmaster by *Edmondo De Amicis: the reasons of its recent revival*

ABSTRACT: The recent French translation by Mariella Colin of *Il romanzo d'un maestro* (*The romance of a schoolmaster*) contributes to the great attention that in the last 10 years has been given to this book written by Edmondo De Amicis. This essay, presenting the work edited by Colin, aims to investigate the reasons why an old and lengthy nineteenth-century book – less known than *Cuore*, De Amicis's masterpiece – is enjoying so much luck, in Italy and abroad.

EET/TEE KEYWORDS: Literature; Primary school; Schoolmaster; Italy; France; XIX<sup>th</sup> Century.

Negli ultimi dieci anni, o poco più, si è assistito a una vera e propria riscoperta di un corposo libro di fine Ottocento: *Il romanzo d'un maestro* di Edmondo De Amicis. Pur non essendo certo l'opera più conosciuta e letta dello scrittore di Oneglia, è tornata recentemente in commercio in forme e con intenti differenti, passando dalla divulgazione al collezionismo per approdare alla storia dell'educazione.

Ad avviare questa sorta di revival letterario è stata un'iniziativa editoriale legata al quotidiano ligure «Il secolo XIX», che nel 2005, nella collana *Liguria d'autore*, offrì ai propri lettori la possibilità di acquistare il romanzo, per l'occasione suddiviso in due tomi, come supplemento al giornale<sup>1</sup>. Essa si

<sup>1</sup> E. De Amicis, *Il romanzo di un maestro*, vol. I: *Miserie e amori*, Milano -Roma, Eurometing, 2005; Id., *Il romanzo di un maestro*, vol. II: *Avventure e battaglie*, Milano-Roma, Eurometing, 2005.

inserì in un contesto caratterizzato da numerose operazioni analoghe; i primi anni Duemila si rivelarono infatti molto fecondi quanto a proposte di questo genere, spesso a carattere regionale, legate alla diffusione di un quotidiano<sup>2</sup>. Si tratta di progetti del tutto scevri da intenti filologici o critico-letterari, ma cui va attribuito il giusto merito di aver riscoperto autori e opere spesso di caratura nazionale, ma talvolta facilmente dimenticati a favore di una narrativa di consumo spicciolo.

Proseguendo in questa disamina, nel 2007, con ben altri presupposti, uscì un'edizione integrale del *Romanzo*, preceduta da tre saggi analitici per cura di Anna Ascenzi, Pino Boero e Roberto Sani<sup>3</sup>. In questo caso il destinatario non era individuato nel solo pubblico generalista, ma anche nello studioso impegnato nella raccolta di una documentazione utile per le proprie ricerche, nell'insegnante desideroso di trovare ispirazione e testi da leggere durante le lezioni in classe, nel lettore più avvertito che non disdegna di cercare chiavi di lettura e il corretto inquadramento storico e letterario del testo nelle analisi proposte da ricercatori accademici.

Al collezionista, allo studioso di storia della televisione e allo spettatore incuriosito dai vecchi programmi si rivolgeva, invece, un'iniziativa di Rai Trade del 2009, che raccolse in 2 DVD le 5 puntate dello sceneggiato mandato in onda nel 1959<sup>4</sup>. La regia della riduzione televisiva del romanzo deamicisiano era stata affidata a Mario Landi, mentre l'attore romano Armando Francioli aveva interpretato il ruolo del protagonista.

Per quale motivo, verrebbe ora da chiedersi, è stata recentemente rivolta tanta attenzione nei confronti di un romanzo ottocentesco che, nell'edizione integrale del 2007 (in grande formato, con scrittura fitta e un corpo del testo un po' minuto) occupava quasi 400 pagine?

La risposta sta nei contenuti e nella natura stessa del testo che può a buon ragione essere definito un romanzo-inchiesta sulla scuola italiana post unitaria. Ne è convinta anche Mariella Colin, la quale ha curato e tradotto la prima edizione francese, uscita nel 2016 col titolo *Le roman d'un maître d'école* all'interno della collana *Cahiers de Transalpina* dell'Université de Caen Basse – Normandie<sup>5</sup>. Il romanzo aveva già goduto, sulla scia del successo di *Cuore*, dell'onore di un'edizione spagnola (1890), di una inglese (1892) e di una svizzera (1894), quest'ultima solo «liberamente tradotta» in francese, dalla

<sup>2</sup> Basti qui ricordare, a puro titolo d'esempio, la biblioteca *Veneto d'autore*, legata ai quotidiani «Il Mattino di Padova», «La Tribuna di Treviso», «La Nuova di Venezia e Mestre» (2003), oppure la *Collezione d'autore*, uscita in abbinamento a «La Stampa» (2005).

<sup>3</sup> E. De Amicis, *Il romanzo d'un maestro*, A. Ascenzi, P. Boero, R. Sani (edd.), Genova, De Ferrari, 2007.

<sup>4</sup> *Il romanzo di un maestro* di Edmondo De Amicis; regia di Mario Landi; riduzione e sceneggiatura: Anna Maria Rimoadli e Grazia Dore, Milano, Rai Trade – RCS libri, 2009.

<sup>5</sup> E. De Amicis, *Le roman d'un maître d'école*, Traduction, introduction et notes de Mariella Colin, Caen, Presses Universitaires de Caen, 2016.

quale vennero però espunti, in maniera un po' arbitraria, vari dettagli e le scene giudicate sconvenienti.

Giunge pertanto in terra francofona come una primizia questa traduzione firmata da Colin, peraltro arricchita da numerose note e da oltre 30 fitte pagine introduttive, con le quali l'autrice offre un vero e proprio saggio, molto documentato e prezioso nelle interpretazioni del testo. Vi possiamo infatti trovare svariati elementi: dal racconto della genesi dell'opera alla sua contestualizzazione nella realtà scolastica, politica e sociale del tempo, da un'analisi critica del romanzo – nei contenuti e nella forma – a una sorta di guida per il lettore francese.

Soprattutto, è possibile rinvenire alcuni elementi per rispondere a quella domanda formulata poche righe innanzi: perché tanto interesse intorno a un vecchio romanzo, scritto da quell'autore oggi tenacemente identificato con l'immagine patriottica e melliflua allo stesso tempo che evoca in tutti noi il libro *Cuore*, un testo dal sapore di un'Italia umbertina così lontana, nel tempo e nella mentalità corrente, dalla sensibilità moderna? Il primo motivo è semplice: perché De Amicis fu autore versatile, buon padrone della penna e capace di una scrittura piana e piacevole alla lettura, influenzata dallo stile giornalistico e da quello, più brioso, della narrativa di viaggio<sup>6</sup>. E del giornalista l'autore ligure ereditò anche il metodo, la deontologia direi quasi: la documentazione raccolta per la stesura del *Romanzo* risultò essere molto ampia, proveniente in particolar modo dai periodici scolastici dell'epoca, ma non solo. È questa attenzione quasi filologica alla realtà della scuola di fine Ottocento a renderlo un testo di inchiesta, di denuncia verrebbe da dire; e in questa sua natura si pone la maggiore differenza con *Cuore*, scritto in parallelo ma con propositi affatto differenti: educativi, edificanti quello, di denuncia sociale e mobilitatore di coscienze questo.

Non è tuttavia sufficiente il carattere rivelatorio delle miserie in cui si dibatteva la classe magistrale del tempo a farne un oggetto di tanto interesse, «se non un vero e proprio capolavoro, almeno un *unicum* nel panorama letterario del secondo Ottocento italiano»<sup>7</sup>. La ragione di fondo della sua rilevanza va ricercata nell'acribia documentaria dello scrittore di Oneglia, il quale non esitò a consultare e utilizzare un corpus di fonti eterogeneo e per certi versi estraneo all'universo letterario, come ricorda Roberto Sani: le inchieste ministeriali sulle condizioni della scuola, la normativa scolastica approvata in sede ministeriale, le deliberazioni emanate dai consigli municipali in ordine al reclutamento e al trattamento economico degli insegnanti e, come già ricordato, le riviste scolastiche. Da queste De Amicis ricavò molti dati, poi utilizzati per dare corpo

<sup>6</sup> Sullo stile narrativo di De Amicis cfr. ora il testo di R. Ubbidiente, *L'officina del poeta. Studi su Edmondo De Amicis*, Berlino, Frank & Timme, 2016.

<sup>7</sup> R. Sani, *Accanto ai maestri. Edmondo De Amicis, l'istruzione primaria e la questione magistrale*, in De Amicis, *Il romanzo d'un maestro*, cit., pp. 5-17, in partic. p. 6.

ai propri personaggi, raccogliendo la loro voce per descrivere i soprusi subiti, le miserie con le quali quotidianamente si trovavano a combattere, le sofferenze per le ingiustizie patite. Ad alimentare la sua fantasia di romanziere – ma sarebbe più corretto dire «a dare realismo ai soggetti protagonisti delle sue pagine» – furono soprattutto quelle particolari rubriche che si andavano pubblicando con tanta fortuna, col pretesto della denuncia, sulle pagine delle riviste di settore: lettere, accuse, racconti in prima persona di maestre e maestri impegnati a non soccombere di fronte a disgrazie e disavventure di ogni genere. Credo, inoltre, che non gli furono estranei neppure i necrologi apparsi sui giornali magistrali, vere e proprie celebrazioni di quei laici missionari di civiltà<sup>8</sup> e anch'essi utili a dare una nota di colore al quadro.

Alla luce di questa imponente e dettagliata documentazione, e dei propositi maturati dall'autore nel corso della stesura del testo, Mariella Colin sostiene come De Amicis non si sia limitato a svolgere il ruolo del ricercatore imparziale, di neutro descrittore dei fatti, ma che abbia indossato i panni dello scrittore militante. In questo atteggiamento gioca un ruolo anche la sensibilità del De Amicis nei confronti delle classi lavoratrici, maturata in casa (la moglie, infatti, era una maestra, fatto che gli permise di avere un'esperienza diretta della condizione magistrale) e confluita nell'adesione al socialismo, quantomeno in quella forma un po' edulcorata conosciuto a Torino col nome di «socialismo dei professori»<sup>9</sup>.

La cornice scelta per fare da sfondo alle vicende narrate è – significativamente – la realtà rurale, paesana, doppiamente tradita dall'autorità ministeriale: alle cure minime riservate da Casati al ramo primario dell'istruzione si aggiungevano la distanza dal capoluogo, l'endemica ristrettezza delle finanze comunali, gli atteggiamenti ambigui, quando non apertamente “predatori” dei sindaci nei confronti delle maestre, la mentalità ristretta e provinciale, lo stipendio da fame (nel senso letterale del termine), l'ignoranza delle classi popolari, le condizioni igieniche non sempre esemplari, l'invidia che cova nel risentimento dei colleghi, le aspirazioni del minuto notabilato locale; l'elenco potrebbe proseguire a lungo, e lo stesso De Amicis offre ai lettori un'amplissima rassegna dei mali che colpivano i maestri e le maestre in servizio nelle scuole rurali. Non a caso, l'ambizione massima era per tutti legata all'esito fortunato di un concorso nei centri maggiori, magari proprio a Torino, come poi accadrà alla fine della storia al protagonista, Emilio Ratti.

Colin, nella sua introduzione, si dilunga su questi ostacoli al quotidiano espletamento del proprio dovere da parte del maestro di campagna, analizzandoli

<sup>8</sup> Sull'utilizzo dei necrologi pubblicati nelle riviste magistrali come fonti storiche cfr. ora A. Ascenzi, R. Sani, «*Oscuri martiri, eroi del dovere*». *Memoria e celebrazione del maestro elementare attraverso i necrologi pubblicati sulle riviste didattiche e magistrali nel primo secolo dell'Italia unita (1861-1961)*, Milano, FrancoAngeli, 2016.

<sup>9</sup> Su questo aspetto cfr. P. Spriano, *Storia di Torino operaia e socialista. Da De Amicis a Gramsci*, Torino, Einaudi, 1972.

nel dettaglio in riferimento al *Romanzo* e inquadrandoli nella realtà del tempo. Emerge in modo particolare la marcata distanza tra la retorica nazionale, tesa a celebrare il valore della missione magistrale, faro di civiltà cui è demandato il compito di formare un popolo, e la mediocre considerazione sociale riservatale. La presa di coscienza di questa situazione fu fonte per il protagonista di amarezze, persuaso com'era stato fino a quel momento di appartenere all'élite, quantomeno culturale, del villaggio. Al contempo il disincanto produsse in lui un'embrionale coscienza di classe, tutta da sgrezzare in quanto non ancora irrobustita dalla teoria, ma ugualmente funzionale agli intenti del De Amicis *engagé*. È infatti nelle meditazioni e nelle parole di Emilio Ratti che possiamo rinvenire traccia del pensiero ideologico dello scrittore ligure, così come nei dialoghi con gli ispettori e i colleghi possiamo talvolta cogliere – seppur in forma minore rispetto ad altre opere, come *Amore e ginnastica* o la novella *Furio* – la posizione del De Amicis all'interno delle teorie pedagogiche e didattiche del tempo.

Sulla *pars costruens* predomina tuttavia, come già anticipato, la *pars destruens* e sulle proposte prevalgono nettamente le critiche. Accuse che non vengono risparmiate agli amministratori locali, spesso esponenti di un ceto mercantile estraneo all'idea di istruzione popolare come valore di arricchimento della persona, quanto piuttosto uso a fare i conti spiccioli sugli stipendi da trattenere, sui risparmi da fare nell'acquisto di suppellettili o nel restauro dei locali. Piccoli contabili ostili alla scuola, gelosi del potere quasi assoluto nei confronti di maestri e maestre e decisi ad abusarne all'occorrenza. Furono soprattutto le insegnanti a subire, anche a livello psicologico, le pressioni maggiori, talvolta sfociate in quello che oggi comunemente viene definito *mobbing*, per non menzionare le *avances* di pretendenti vari. Sottoposte a un trattamento economico discriminatorio, che le costringeva non di rado a una vita di sacrifici e privazioni, le maestre erano diventate in quegli anni protagoniste loro malgrado della cronaca, non solo nei giornali specializzati, come testimoniato dagli articoli del «Corriere della Sera» in seguito al suicidio di Italia Donati o dalla campagna avviata da Matilde Serao sul «Corriere di Roma»<sup>10</sup>.

A fronte del trattamento indecoroso ricevuto, De Amicis non risparmia però alcune stocche nei confronti di quei maestri poco acculturati, senza motivazioni, portati alla bottiglia dallo sconforto della vita e dalle delusioni della professione. Lo stesso Emilio Ratti sembra sull'orlo della perdizione, prima di tornare a incarnare un eroe positivo, al quale è riservato l'onore di un lieto fine, sia professionale che sentimentale.

<sup>10</sup> Per un'analisi della figura della maestra nella stampa e nella narrativa ottocentesca cfr. A. Ascenzi, *Drammi privati e pubbliche virtù. La maestra italiana dell'Ottocento tra narrazione letteraria e cronaca giornalistica*, Macerata, eum, 2012. Il volume si apre, significativamente, con una citazione dal *Romanzo d'un maestro*.

La potenza narrativa del *Romanzo* non va comunque ricercata solo nei contenuti e nel suo carattere di denuncia, ma anche nello stile e nella stessa forma, costituendo, secondo la critica, un testo «più organico e narrativamente più felice, d'un maggiore respiro» rispetto a *Cuore*<sup>11</sup>. È nella tipizzazione dei personaggi, anche di quelli secondari, che emerge con forza la capacità dell'autore di cogliere i dettagli, di dare anima ai caratteri. Una capacità narrativa che si può cogliere, ad esempio, nelle pagine dedicate alle conferenze pedagogiche, nelle quali viene offerta al lettore una galleria di tipi originali. Nondimeno va evidenziata la predisposizione allo scavo introiettivo, a dare insomma una certa profondità psicologica ai personaggi, come nelle scene delle monache alle prese con le lezioni di ginnastica.

Una ricchezza di tipi che rischia però di debordare, specie in un'opera così voluminosa, come sottolinea Mariella Colin, la quale, nell'apprezzare la struttura narrativa, individua un punto debole proprio nel numero elevato di soggetti, di scene, di dettagli. Diciamo che un editor contemporaneo, prima di consentire la pubblicazione dello scritto, avrebbe imposto un lungo lavoro di cesoia più che di lima, «procedendo quasi esclusivamente per via di levare», per utilizzare le parole di un altro celebre scrittore, Luigi Meneghello<sup>12</sup>. È dunque anche per evitare al lettore francese contemporaneo di perdersi in rivoli secondari che nulla apportano al succo della vicenda che Colin propone una traduzione fedele del testo ma parziale, depurata degli episodi marginali e dei capitoli dedicati a personaggi secondari. Non si tratta, è bene chiarirlo, di una scelta arbitraria fondata sul gusto soggettivo, ma di una valutazione dettata da un preciso intento, quello di privilegiare le pagine relative alla vista scolastica e alla condizione dei maestri e delle maestre.

Il carattere di *Bildungsroman* del testo lo rende infatti, se non paradigmatico in tutti i soggetti descritti – solo una minoranza poté pienamente identificarsi nel protagonista – certo una realistica rappresentazione del mondo della scuola negli anni Settanta e Ottanta dell'Ottocento, in concomitanza con l'applicazione della legge Coppino (1877) sull'obbligo scolastico. Di emblematico, nella personale vicenda del Ratti, ci sono non tanto, o non solo, la sete di conoscenza, il desiderio di riscatto sociale e la volontà – oltre alla capacità e alla preparazione, fattori per nulla secondari – di vincere un concorso di ruolo in una grande città, quanto piuttosto il cammino di crescita professionale, gli anni di precariato fatti di pellegrinaggi tra villaggi e paesini sperduti, le amarezze del mestiere, la solitudine di fronte ai dubbi di ordine pedagogico e didattico. Comuni a molti furono anche le ragioni che lo avevano spinto a intraprendere la carriera docente: l'esigenza di rendersi indipendente dopo una sventura familiare. Non

<sup>11</sup> F. Portinari, *La miniera di De Amicis*, in *Edmondo De Amicis. Opere scelte*, F. Portinari, G. Baldissoni (edd.), Milano, Mondadori, 2006, p. LII.

<sup>12</sup> Il riferimento – preso dalla nota introduttiva la riedizione – è al lavoro di revisione che Meneghello fece per la seconda edizione de *I piccoli maestri*, ripubblicato nel 1976 (I ed. 1964).

per vocazione (o per attitudine, talento) dunque, ma per necessità; come molti, allora come, almeno in parte, ancora oggi.

Ecco allora che tra i destinatari principali di questo *Romanzo* ci sono proprio gli e le insegnanti della scuola primaria, che potranno trovare differenze e più di qualche occasionale analogia con le vicende narrate. Lo stile piano, l'ironia di molte pagine e tutto il mestiere di De Amicis nell'intreccio della narrazione, occorre ripeterlo, rendono il testo piacevole anche per il lettore contemporaneo. Per quanto riguarda il pubblico francese, Mariella Colin individua poi i soggetti potenzialmente interessati all'opera negli storici della scuola e dell'educazione e negli specialisti di letteratura italiana, popolare e infantile.

Tra questi, mi pare che soprattutto ai primi, agli storici dell'educazione e della scuola, possa interessare in particolar modo quel grande affresco letterario che risponde al nome de *Il romanzo d'un maestro*. Come più volte ribadito in queste pagine, il testo del De Amicis rappresenta una vera e propria miniera di informazioni, una fotografia della scuola di fine Ottocento – e dei suoi principali protagonisti, dagli insegnanti agli ispettori, dagli alunni alle famiglie – da utilizzare come fonte storica primaria.

Non provi stupore il purista del metodo storiografico di fronte a questa affermazione: con le dovute cautele di ordine metodologico, un romanzo come questo diventa un documento prezioso per entrare nelle aule del tempo e «per ritrovare pratiche quotidiane altrimenti perdute nel limbo dei sentimenti, delle emozioni, dei valori creduti, vale a dire tutto quell'infinito universo di umanità che non esistono altre fonti capace di trattenere (non i documenti d'archivio, non i reperti archeologici)»<sup>13</sup>. Una volta verificate l'affidabilità dell'autore – De Amicis, come Dickens, per fare un altro nome, o Zola –, la documentazione consultata, la rispettiva vena realistica, etc., lo storico può infatti sentirsi autorizzato a utilizzare un romanzo come fonte storica, soprattutto in riferimento all'«universo emotivo di un certo tempo storico», testimonianze di norma molto difficili da reperire.

Si tratta di un aspetto per nulla secondario nella ricostruzione storica del sistema scolastico di una determinata epoca: certo, ci sono le leggi, le inchieste ministeriali, i libri di testo, le fonti materiali che ci permettono di tracciare il percorso evolutivo della normativa, della didattica, della funzione degli insegnanti. Ma il vissuto, le aspirazioni, le amarezze dei protagonisti, etc., sono tutte emozioni che rimangono solo accennate. Per fare luce sugli squarci interiori dei soggetti coinvolti è necessario rifarsi ad altre tipologie di fonti, dai diari alle lettere, dalle autobiografie a, appunto, i romanzi.

Ecco, in conclusione, la ragione terminale della recente riscoperta di un ricchissimo testo narrativo come *Il romanzo* deamicisiano, di cui la traduzione

<sup>13</sup> P. Colombo, *A margine di Cuore. Note sul rapporto fra storia e narrazione*, in A. Arisi Rota, M. Ferrari, M. Morandi (edd.), *Patrioti si diventa. Luoghi e linguaggi di pedagogia patriottica nell'Italia unita*, Milano, FrancoAngeli, 2009, pp. 199-205, in partic. p. 204.

francese di Mariella Colin costituisce l'ultimo e felice esito in ordine di tempo: esso rappresenta una porta – affidabile, solida – nel mondo dei sentimenti, la cui rilevanza, anche in ottica storica, è particolarmente evidente in quest'epoca di aperta ostentazione delle emozioni e dei sensi, compresi quelli più privati.



# Il coraggio di dire “cose nuove”. A proposito di quattro recenti libri

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*The courage to say “new things”. About four recent books*

**ABSTRACT:** This paper intends to make an assessment on the current state of historical educational and pedagogical research in Italy. The analysis of four recent books of young historians of education reveals how the discipline is experiencing a season of renewal thanks to the rigorous and valuable work conducted by a new generation of historians of education.

**EET/TEE KEYWORDS:** History of Education; Historiography; Historical Research; Historical Method; Italy; XX<sup>th</sup>-XXI<sup>th</sup> Centuries.

## *Premessa*

Una fortuita coincidenza ha voluto che, nel volgere di pochi mesi, siano usciti quattro nuovi libri di giovani studiosi che, pur dedicati a questioni tra loro diverse (due sono più accostabili all'ambito della storia della scuola, due più d'interesse storico pedagogico), possono tuttavia essere considerati unitariamente e perciò sono raccolti insieme in questa nota critica.

Li uniscono il rigore documentario che sostiene le diverse narrazioni tutte basate su fonti di prima mano; il coraggio di misurarsi con questioni non marginali e che dicono “cose nuove”; il respiro culturale nel quale le tematiche sono inserite senza riduzionismi specialistici (non mi stancherò di dire che non si può fare storia educativa se non si colloca entro una storia culturale); il superamento della distinzione tra storia delle idee e storia degli eventi scolastici.

I quattro testi qui presentati possono inoltre essere considerati un piccolo campione di come gli studiosi più giovani si stanno orientando nel grande oceano della storia educativa e pedagogica. Resta vivo l'interesse per tematiche che si possono definire “classiche” come il genere biografico e la ricostruzione di pagine importanti (e purtroppo dimenticate) di storia nazionale. Ma emergono anche interessi di frontiera come la ricostruzione anche materiale della vita

scolastica. Segno di continuità di una tradizione e, nel medesimo tempo, di sensibilità e apertura al nuovo.

Ci sono insomma tanti motivi – congiunti ai lavori di altri validi giovani come Luigiaurelio Pomante, Fabio Targhetta, Paolo Alfieri, il compianto Davide Montino, cui si devono ricerche di pari valore – per concludere che nonostante difficoltà di vario tipo la ricerca storico educativo-pedagogica è ben viva e offre risultati di prima qualità.

### *I contadini a scuola*

Luca Montecchi con il suo *I contadini a scuola. La scuola rurale in Italia dall'Unità alla caduta del fascismo*<sup>1</sup> amplia le nostre conoscenze sulle vicende della scuola rurale, «una scuola dimenticata, disertata dai maestri, maltrattata dai Comuni», come annota l'autore, e spesso neppure amata da quei contadini ai cui figli era rivolta. Se non è mancata già qualche apprezzabile attenzione sul tema in anni andati (Bertoni Jovine, Raicich, più recentemente Alatri e invero poco altro), finora nessuno si era tuttavia assunto il compito di delineare una visione d'insieme del tema.

La scuola popolare è stata spesso identificata con le classi elementari urbane anche se per oltre un secolo (tra i primi decenni del XIX secolo e gli anni '50 del Novecento) la scuola rurale ha rappresentato l'unico contatto con la cultura e lo Stato per grandi masse di Italiani che vivevano in campagna e ha provveduto alla alfabetizzazione di generazione di bambini e adulti. Salvo pochi cenni in genere connessi al diverso trattamento giuridico dei maestri di città rispetto a quelli di campagna gli studi che hanno ricostruito le vicende della scuola elementare hanno per lo più «dimenticato» l'istruzione rurale.

Va a merito di Montecchi – oltre a quello di aver raccolto un'ampia documentazione, impresa da sola già meritoria – aver affrontato il tema dell'istruzione dei contadini (attenzione: esperienza parallela, ma diversa dall'istruzione agraria) non in un'ottica settoriale, ma di averlo indagato sotto molteplici punti di vista: i dibattiti politici, gli aspetti normativi, le questioni sociali connesse alla condizione contadina, i miti sulla ruralità «naturale» dell'Italia fino all'esame delle condizioni di vita delle piccole comunità disperse in luoghi appartati e talora poco accessibili.

L'autore non trascura i principali protagonisti di tante meritorie (e spesso purtroppo dimenticate) iniziative. Giusto spazio viene riservato ad alcune figure di filantropi, benefattori e organizzatori di scuole come, per esempio, Vincenzo Garelli, Ottavio Gigli (di cui recentemente Anna Ascenzi e Roberto Sani hanno

<sup>1</sup> L. Montecchi, *I contadini a scuola. La scuola rurale in Italia dall'Unità alla caduta del fascismo*, Macerata, eum, 2016.

rispolverato i generosi, ma sfortunati propositi), Giovanni Cena, Alessandro Marcucci e a studiosi che hanno elaborato una vera e propria pedagogia ispirata ai valori del mondo contadino (tra i più noti: Giuseppe Lombardo Radice, Felice Socciarelli, Maria Maltoni). Adeguate segnalazioni riguardano infine sodalizi particolarmente attivi in questo ambito come le Scuole per i contadini dell'Agro Romano e delle Paludi Pontine, il Gruppo d'Azione per le Scuole del Popolo, l'Associazione Nazionale per gli Interessi del Mezzogiorno d'Italia ed altre ancora meno note, ma ugualmente meritorie.

L'ultima parte del corposo volume di Montecchi è dedicato a esplorare la fortuna incontrata dalla scuola rurale tra gli anni '20 e '40, un fenomeno davvero imprevisto, se si pensa alla sua storia contrassegnata dalla conclamata inferiorità rispetto alle scuole di città. Si deve soprattutto a Giuseppe Lombardo Radice questa specie di rivincita: la valorizzazione della semplicità, della spontaneità e della freschezza infantile che egli individua come tratti caratteristici delle scuole per i piccoli contadini, sono posti alla base – come veri e propri pilastri – della sua concezione di «scuola serena» che, come è largamente noto, ebbe lunga e meritata fortuna anche dopo la morte del suo promotore.

### *La pedagogia attiva di Marco Agosti*

Il mondo scolastico fatto di cose semplici e di rispetto per l'infanzia secondo i principi della pedagogia lombardiana non fu estraneo alla elaborazione del metodo naturale da parte di Marco Agosti e alla sua idea di «scuola per il fanciullo». Proprio ad Agosti Evelina Scaglia dedica un'ampia biografia dal titolo *Marco Agosti. Tra educazione integrale e attivismo pedagogico*<sup>2</sup>, colmando, in questo caso, una lacuna nella ricostruzione della pedagogia dei cattolici tra le due guerre.

La Scaglia non è nuova nel coltivare un genere «classico» come dimostra il suo lavoro su Calò apparso del 2013. Se non era facile tracciare il profilo di Calò, uomo della mille risorse e dalla pluralità delle appartenenze, non meno impegnativo era misurarsi con la figura di Agosti sul cui giudizio è pesata a lungo (e secondo taluni tuttora peserebbe) l'adesione al fascismo. L'autrice si affida alla copiose carte disponibili, giungendo alla conclusione che il «fascista Agosti» né più né meno si comportò come la stragrande maggioranza dei cattolici italiani, senza mai macchiarsi di fatti o episodi riprovevoli.

Dalle pagine del testo emergono una figura di studioso capace di coniugare una robusta impostazione teoretica (si laureò a Milano con il filosofo Piero Martinetti) con un senso pratico e una sensibilità educativa assai spiccata e quella,

<sup>2</sup> E. Scaglia, *Marco Agosti. Tra educazione integrale e attivismo pedagogico*, Brescia, La Scuola, 2016.

al tempo stesso, di maestro ricco di genialità ed esperto uomo di scuola (oggi lo definiremmo un pedagogista della scuola). Insieme a Vittorino Chizzolini, con il quale intrattenne un'amicizia durata mezzo secolo, fece dell'Editrice La Scuola di Brescia tra gli anni '30 e '60 un fondamentale punto di riferimento per i maestri italiani. Le sue collaudate pratiche didattiche ordinate secondo il metodo naturale, da lui direttamente sperimentate nelle scuole bresciane (ove diede vita a uno dei più interessanti esempi di scuola attiva italiana, il «metodo dei reggenti»), ispirarono l'azione giornaliera di migliaia di insegnanti elementari lettori di «Scuola Italiana Moderna».

Il nome di Agosti è legato soprattutto alla formazione dei maestri, obiettivo che perseguì sia sul piano della riflessione pedagogica, sia soprattutto con l'animazione di numerose iniziative molte delle quali promosse con il convinto appoggio di padre Agostino Gemelli, nell'ambito delle attività del *Paedagogium*. Nel secondo dopoguerra fondamentale fu la sua direzione dei periodici convegni di Pietralba attraverso cui sollecitò la circolazione di un attivismo didattico che, mentre prendeva le distanze dall'attivismo fisio-bio-psicologico ginevrino faceva tuttavia proprie le istanze del puerocentrismo che stavano gradualmente modificando l'impianto scolastico tradizionale. Per sfuggire al funzionalismo psicologistico bisognava disporre di maestri che sapessero «umanizzare» la scuola attiva, non solo capaci di impiegare nuovi metodi: di qui il suo incessante lavoro nel mondo magistrale.

Attraverso Agosti e il gruppo pedagogico bresciano di Casotti, Agazzi, Nosengo, Chizzolini si diffuse una interpretazione della scuola attiva dai tratti più esperienziali che sperimentali, più vicina – in una parola – all'impostazione dell'attivismo data da Ferrière e Lombardo Radice che a quella di Claparède e Decroly. Questo approccio coltivato dai cattolici bresciani, congiungendosi alla tradizione lombardiana, assicurò alla scuola primaria del nostro Paese una lunga e positiva scia che nemmeno l'efficientismo anglosassone che ne prese il posto tra gli anni '70 e '80 riuscì a cancellare.

### *La pedagogia cattolica nel secondo Ottocento*

Anche il volume di Andrea Marrone (*La pedagogia cattolica del secondo Ottocento*)<sup>3</sup>, è centrato su una pagina poco nota o addirittura dimenticata della storia della pedagogia cattolica e precisamente il tassello ricompreso tra lo spiritualismo risorgimentale (Capponi, Lambruschini, Rosmini) e la stagione del primo Novecento quando la cultura educativa dei cattolici tornò a svolgere un ruolo di rilievo, *in primis* con Mario Casotti e Luigi Stefanini.

<sup>3</sup> A. Marrone, *La pedagogia cattolica del secondo Ottocento*, Roma, Studium, 2016.

Il giovane studioso esplora le ragioni di un duraturo silenzio dovuto «a una diffusa interpretazione storiografica che ha giudicato poco significativa e forse ripetitiva l'elaborazione di matrice cristiana nei decenni del positivismo». Il punto di partenza di Marrone è radicale: cosa c'è di davvero interessante in pagine di autori avvolti da un velo di silenzio da oltre un secolo? Essi rappresentarono una pagina così importante da meritare la reintegrazione nella storia educativa e pedagogica?

La risposta è deposta in alcune piste di ricerca. In primo luogo viene ricostruito l'apporto degli autori di maggior spicco attivi a cavaliere tra i due secoli (Giuseppe Allievo, Francesco Paoli, Carlo Uttini, Augusto Conti a Antonio Alfani). Contestualmente viene indagata la circolazione in Italia di importanti (e innovativi) scritti di studiosi come Félix Dupanloup, Jean Guibert e Martin Gillet, le cui opere furono ampiamente tradotte dalle case editrici cattoliche. La terza parte del saggio riguarda infine un sondaggio sulla pubblicistica popolare femminile dal quale emergono, a livello popolare, nuovi atteggiamenti.

Contrariamente a quanto si è a lungo creduto i protagonisti italiani e non della pedagogia cristiana dell'ultimo Ottocento furono personalità tutt'altro che irrilevanti. Documenti alla mano Marrone ne dimostra lo spessore culturale, la passione civile e la coerenza religiosa, contestando non solo le frettolose analisi e pregiudiziali letture critiche svolte dagli avversari positivisti ed hegeliani, ma anche la diffidenza manifestata da quel mondo cattolico intransigente che mal digeriva la serena accettazione dello Stato liberale da parte di questi intellettuali.

Secondo Marrone la realtà di minoranza non coincise con l'insignificanza culturale. L'inedito contesto culturale nel quale essi si trovarono ad operare nell'ultimo scorcio del XIX secolo, li spinse a far tesoro dell'eredità del passato più recente, ripensandola e ampliandone gli orizzonti intorno ad alcune questioni strategiche. Importante fu l'apporto degli studiosi d'Oltralpe.

Il volume ne sottolinea alcune: la pretesa scienziata di governare sperimentalmente l'educazione fu vissuta come stimolo a migliorare le pratiche didattiche e a considerare il valore formativo anche della cultura scientifica; la tendenza dello Stato ad avocare a sé un crescente potere scolastico senza tenere conto delle istanze di quella che oggi definiremmo la società civile, sollecitò l'approccio a una visione laica della libertà d'insegnamento e non solo confessionale; l'esigenza di assicurare l'ordine sociale e una visione della pedagogia centrata sulla autorità non impedirono di sottolineare che l'allievo è prima di tutto una persona da far crescere e non soltanto un individuo a disciplinare; i primi fermenti femministi orientarono a ripensare (cautamente) il ruolo della donna nella vita familiare e sociale.

La modernizzazione borghese che stava modificando l'Europa positivista non passò, dunque, senza colpo ferire su questi studiosi che anziché chiudersi in un orgoglioso rifiuto accettarono la sfida e rielaborarono i contenuti della proposta educativa cristiana tenendo conto dei cambiamenti in corso. Senza il loro apporto – e in specie quello degli autori stranieri che esercitarono

un'influenza finora misconosciuta – sarebbe stato più difficile il rilancio della pedagogia cristiana dei primi decenni del XX secolo, anche se va ricordato che tale rilancio sarebbe stato assai più problematico se non si fosse incrociato con il neoidealismo gentiliano.

### *La storia dell'aula scolastica*

Anche il volume di Juri Meda (*Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*)<sup>4</sup> si svolge in un orizzonte nuovo e alquanto inedito per la storia pedagogica italiana. Da tempo Meda ha intrapreso un percorso di ricerca centrato sull'insieme degli strumenti materiali che, con maggior evidenza a partire dal secondo Ottocento, hanno affiancato e integrato l'azione dei maestri. Si tratta della cospicua produzione di arredi, libri di testo e di amena lettura, quaderni, sussidi didattici di vario genere (carte geografiche, mappamondi, modelli di corpo umano, pallottolieri, cartelloni alfabetici e numerici, oggettistica per la ginnastica, etc.) immessa in modo sempre più incisivo nel mercato scolastico dalle industrie editoriali e dalle imprese specializzate per esempio nella lavorazione della carta (quaderni, diari).

L'autore si muove tra storia educativa e storia economica e industriale, approfondendo tre principali temi: la produzione e l'impiego didattico del banco scolastico, l'industrializzazione del quaderno con la creazione di uno specifico mercato e il diario scolastico indagato in età fascista quando diviene uno «strumento di infiltrazione ideologica del regime». Il volume è completato da un saggio introduttivo sulla «cultura materiale della scuola all'interno della riflessione storiografica italiana e internazionale» e da un capitolo conclusivo sulle «nuove prospettive euristiche aperte dalla storia della cultura materiale della scuola».

Il volume di Meda è costruito intorno a tre interessanti questioni legate alle ricerche in corso in varie parti d'Europa (in specie Francia, Gran Bretagna e Spagna) sulla «storia dell'aula scolastica». La prima riguarda l'impiego omologante dei materiali scolastici nell'azione didattica, né più né meno di quanto accade per i libri di testo. Nel XIX secolo essi, come è noto, perdono la caratteristica dei «libri d'istruzione per la gioventù studiosa» dai tratti assai vari e assumono una rigida fisionomia manualistica. La pianificazione didattica non è casuale, ma ha lo scopo di assicurare alla scuola la capacità di raggiungere le due principali finalità educative proprie della società borghese: la riproduzione in larga scala dei valori esistenti e l'integrazione dei cittadini subalterni entro codici sociali prestabiliti.

<sup>4</sup> J. Meda, *Mezzi di educazione di massa. Saggi di storia della cultura materiale della scuola tra XIX e XX secolo*, Milano, FrancoAngeli, 2016.

Il processo di omologazione favorisce al tempo stesso – seconda questione – la modernizzazione delle pratiche didattiche e il miglioramento degli ambienti scolastici e l'immissione della scuola entro un circuito industriale ed economico. A mano a mano che aumenta la frequenza con l'istruzione obbligatoria si ampliano gli spazi del commercio librario e del materiale scolastico. Il tema riguardante chi e come produce il materiale scolastico appare ancora tutto (o in gran parte) da esplorare, a differenza della manualistica su cui disponiamo già di numerosi e solidi dati.

Queste ricerche riguardano la pedagogia? Si chiede infine – terza questione – Meda. Certamente sì, perché non solo i libri, ma anche i sussidi e i materiali non costituiscono un mondo inerte o «neutro», ma hanno la forza di influenzare l'agire educativo del maestro che perde le caratteristiche dell'artigiano «fai da te». Essi stessi sono poi frutto di una visione pedagogica e interagiscono con un universo condizionato anche dalle leggi del mercato e dalla mentalità politica e sociale. Questa dimensione implicitamente "pedagogica" spesso scorre sotterranea, salvo manifestarsi in forma evidente in particolari condizioni storiche (la Grande Guerra, il colonialismo, il fascismo) non solo sui libri, ma anche sull'intero mondo dei sussidi e dei materiali.

La produzione di quelli che l'autore definisce nel titolo «mezzi di educazione di massa» apre certamente praterie per i volenterosi che avranno il coraggio di avventurarsi, una avventura tanto più proficua e utile se gli esploratori saranno armati di solide bussole pedagogiche per cogliere in profondità – e non solo in forma estetica come spesso accade a livello museale – le transizioni e le trasformazioni «tecnologiche» che hanno accompagnato la vita scolastica.





## *Forum / Discussioni*



# The subject of Pedagogy at Austrian universities and teacher training between 1774 and 1918\*

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**ABSTRACT:** Austria was the first state to introduce chairs for pedagogy at its universities and philosophical colleges. What was the purpose of this measure? Which tasks should its professors take care of? What did they contribute to the advantage of the school system through teacher training and pedagogical research? And how did the subject pedagogy develop until the end of the Habsburg Monarchy in 1918? These questions are treated here concerning the differences between primary and secondary school teachers, as well as the difference between practical, philosophical and scientific pedagogy. The history of the subject pedagogy at universities starts with the period of «practical knowledge of education» from 1805 to 1848, as demonstrated in the textbook of Vinzenz Eduard Milde 1811-1813, which is indeed its climax. The main part of this paper deals with the beginning of «philosophical pedagogy» from 1871 onwards. Its central figure was Otto Willmann, the most important representative of the first generation of nine professors who taught pedagogy at the universities of Vienna, Lemberg, Prague and Graz between 1871 and 1918. Willmann serves as an example of how the insecurity of the epistemological groundwork has injured the ascent of pedagogy as a science and its usefulness for the training of teachers.

**EET/TEE KEYWORDS:** Vinzenz Eduard Milde; Otto Willmann; History of Pedagogy, History of Education; Austria; XVIIIth-XXth Centuries.

We are used to the notion that pedagogy should be studied as part of training programs for the teaching profession. While this is a compelling vision, it is quite abstract and low in content. The actual situation has been and continues to be far more complex. Europe has had state school systems, a teaching profession

\* Opening lecture at the International Symposium *The Study of Pedagogy between Tradition and the Challenges of the Future in Central and Southeastern Europe* (October 22<sup>nd</sup>, 2015 at the University of Maribor, Slovenia).

and pedagogy as a university subject only since the Age of Enlightenment. This is why the eighteenth century was also called «the pedagogical century»<sup>1</sup>.

Never before was as much written, published and publicly discussed about education, schools and teachers. The education of children and youth was always a family matter. Before the Enlightenment, schools were the responsibility of the church, the community and the lords of manors. In rural areas, up until 1770 the great majority of children grew up without any formal instruction<sup>2</sup>. Beginning then, the school system, its organization and financing, development and control became the responsibility of the absolutist state.

In Austria, school reform was especially important as an aspect of state reform, because the Habsburg Monarchy was not an established national state. It was merely a loose association of relatively independent countries and regions with ten different languages and great differences in the level of culture, economic development and civic loyalty.

This cultural and political fragmentation necessitated a unification and harmonization of the legal system and administration. Consequently, after assuming power in 1740, Maria Theresia was responsible for seeing to it that there were reliable officials in the provinces, districts and communities who would serve the whole Habsburg state, and that there would be adequate financing. Only on this foundation could a uniform, comprehensive national elementary school system be created after 1770, which was later called the «people's school» (*Volksschule*). This not only had to promote enthusiasm for learning, knowledge and competence, but also concern for a unifying national patriotism, then called a «national spirit» (*Nationalgeist*).

The ultimate purpose of school reform was to teach the population to be responsible Christian citizens who would willingly serve their common homeland. To achieve this end, an alliance of the absolutist state and the Church was indispensable. Austria had been a Catholic state since the successful Counter-Reformation – with the exception of a few regions of Hungary, Transylvania and Silesia. Part of the Habsburg *raison d'état* was to maintain religious unity in order to strengthen the needed political unity<sup>3</sup>.

<sup>1</sup> W. Roessler, *Die Entstehung des modernen Erziehungswesens in Deutschland*, Stuttgart, Kohlhammer, 1961, p. 3; W. Brinkmann, *Das "Pädagogische Jahrhundert oder": Dialektik der Aufklärung*, in W. Böhm, A. Wenger-Hadwig, *Erziehungswissenschaft oder Pädagogik?*, Würzburg, Ergon-Verlag GmbH, 1998, pp. 165-190. Satirically already J.G. Schummel, *Spitzbart. Eine komi-tragische Geschichte für unser pädagogisches Jahrhundert (1779)*, Leipzig, Kiepenheuer, 1779.

<sup>2</sup> J.A. von Helfert, *Die Gründung der österreichischen Volksschule durch Maria Theresia*, Prag, Tempsky, 1860, p. 65; A. Ficker, *Österreich*, in K.A. Schmidt, *Encyklopädie des gesamten Erziehungs- und Unterrichtswesens*, vol. 5, Gotha, Besser, 1866, p. 243; H. Engelbrecht, *Geschichte des österreichischen Bildungswesens*, vol. 3: *Von der frühen Aufklärung bis zum Vormärz*, Wien, Österreichischer Bundesverlag, 1984, p. 23.

<sup>3</sup> W. Brezinka, *Österreichs Volksschullehrer und ihre Ausbildung im Spannungsfeld zwischen Staat und Kirche 1774-1869*, «Erziehung und Unterricht», vol. 164, 2014, pp. 530-544; Id., *The "scientification" of Pedagogy and its consequences. Retrospectives and prospects*, «History of

This is the political frame within which the Austrian school system and the training of its teachers developed. What was the role played by the academic subject of «educational lore» (*Erziehungskunde*) or “pedagogy” in this?

First, one must remember that already in the Age of Enlightenment there were various types of pedagogy. Depending on the scope of the subject’s content, we find «general» and «special pedagogy»; depending on the approach to grounding pedagogical statements, «empirical» and «speculative pedagogy»; depending on the educational level of hearers and readers, «popular» and «scientific pedagogy»; depending on the degree of applicability, «practical» and «philosophical pedagogy». Of the greatest significance for the school system, teacher training and their history was the distinction between «elementary school pedagogy» and «gymnasium pedagogy» (in Austria *Mittelschulpädagogik*).

Second, one should note that the statutory introduction of pedagogical teaching contents in the training of Austrian primary school teachers and religion teachers occurred about thirty to forty years earlier than the establishment of chairs for educational lore (*Erziehungskunde*) at universities. The development of the discipline of pedagogy at universities can only be understood if it is viewed in connection with the development of the overall school system and the professional training of all types or classes of teachers.

Therefore, I will treat my subject in three preliminary sections and one main section: 1. Pedagogy in the training of primary school teachers; 2. Pedagogy in the training of theologians as religion teachers and school supervisors; 3. Pedagogy for the training of private tutors. In the main section (4.), I will then deal with the tasks and achievements of university pedagogues in the tension-filled field between teacher training and educational theoretical research.

### 1. *Pedagogy in the training of primary school teachers*

Maria Theresia’s 1774 *General School Ordinance* reformed the lower level school system «in all imperial and royal hereditary lands». For the first time, the training, examination and work performance of primary school teachers were statutorily regulated<sup>4</sup>.

In each province, a model or standard school (*Normalschule*) was established as the highest school form. Besides instruction for its pupils, it also provided so-called preparatory courses (*Präparandenkurse*) for teacher training programs. At first, however, the training lasted only three to six months. «Lecturing and explaining» were «the characteristics and duties of proper teachers»: especially

Education and Children’s Literature», vol. 9, n. 2, 2014, pp. 235-248.

<sup>4</sup> Engelbrecht, *Geschichte des österreichischen Bildungswesens*, vol. 3: *Von der frühen Aufklärung bis zum Vormärz*, cit., p. 102.

«the subjects on which they should instruct; the knowledge of methods; practice in actual instruction; the most important aspects of school discipline»<sup>5</sup>. This is to say: disciplinary means in the service of moral education.

The *General School Ordinance* (*Allgemeine Schulordnung*) was the work of the Silesian Augustinian Abbot Johann Ignaz Felbiger (1724-1788). He supplemented it in 1775 with a *Methods book for teachers of the German schools in the imperial-royal hereditary lands* (*Methodenbuch für Lehrer der deutschen Schulen in den kaiserlich-königlichen Erbländern*)<sup>6</sup>. It contained exact regulations and advice for «methods of teaching» (*Lehrart*) all objects of instruction, on the necessary characteristics of schoolteachers, on the behavior of pupils and teaching colleagues, as well as on the duties of school directors and supervisors.

This was a handbook for school practice written from the self-confident viewpoint of a bureaucratic central administration, leaving no detail unregulated. This was far from the circumspect inquiring style of science. In simple and clear language, with great expertise and authoritativeness, a professional lore and teaching of wisdom were offered for primary school teachers as «assistants of the pastor»<sup>7</sup>.

The *General School Ordinance* and its rapid implementation despite much resistance was politically a decisive means of culturally unifying the multinational monarchy. Through his *Methods book* on a Christian basis, valid for the entire state, Felbiger also contributed essentially to the fact that in Austria the profession and the professional consciousness of lower-level school teachers could arise at a fairly early date.

In a publicistic regard, Felbiger's chief work rapidly lost its influence, however, because the art of teaching that he dogmatically propagated was too mechanical, pedantic and demanding<sup>8</sup>. In the history of the field, it was

<sup>5</sup> General School Ordinance (*Allgemeine Schulordnung*) 1774, §5, in J. Panholzer (ed.), *Johann Ignaz von Felbigers Methodenbuch. Mit einer geschichtlichen Einleitung*, Freiburg im Breisgau, Herder, 1892, p. 298; L. Boyer, *Schulordnungen, Instruktionen und Bestellungen. Quellen zur österreichischen Schulgeschichte vom Mittelalter bis zum Ende des 18. Jahrhunderts*. Vol. V: 1769-1777, Wien, Jugend und Volk, 2008, p. 159.

<sup>6</sup> Panholzer (ed.), *Johann Ignaz von Felbigers Methodenbuch. Mit einer geschichtlichen Einleitung*, cit., pp. 109-362.

<sup>7</sup> Felbiger in Panholzer (ed.), *Johann Ignaz von Felbigers Methodenbuch. Mit einer geschichtlichen Einleitung*, cit., p. 244.

<sup>8</sup> For a description and critique of «Felbiger's art of teaching» (*Lehrart*), which was adopted from Johann Friedrich Hahn (1710-1789) of the Berlin middle school (*Realschule*) directed by Johann Julius Hecker (1707-1768), see G. Schindler, *Hahn-Felbigersche Methode*, in *Lexikon der Pädagogik*, Bd. II, Freiburg Herder, 1953, p. 569; L. Boyer, *Elementarschulen und Elementarunterricht in Österreich. Illustrierte Chronik der Schul- und Methodengeschichte von den ältesten Quellen bis zum Ende des 19. Jahrhunderts*, Graz, Leykam, 2012, p. 96. Well balanced evaluation of Felbiger in K. Wotke, *Vincenz Eduard Milde als Pädagoge und sein Verhältnis zu den geistigen Strömungen seiner Zeit. Eine cultur- und quellengeschichtliche Einleitung in seine "Erziehungskunde"*, Wien (Beiträge zur Österreichischen Erziehungs- und Schulgeschichte.

the most important forerunner of that practical primary school pedagogy that toward the end of the eighteenth century was created by pedagogues for teacher training at Austrian normal and main schools (*Hauptschulen*).

In their circle, the following authors and texts stand out:

In Bohemia, Alexius Vinzenz Parizek (1748-1822), from 1790 on Director of the Prague teacher training school, who wrote the following books: «Sketch of a proper pedagogue for prospective schoolteachers» (*Skizze eines rechtschaffenen Schulmannes für angehende Schullehrer*, 1791), «On teaching methods in the primary schools for candidates for admission to teacher training schools, catechists and teachers» (*Ueber Lehrmethode in den Volksschulen für Präparanden, Katecheten und Lehrer*, 1797). In Salzburg, Franz Michael Vierthaler (1758-1827), from 1790 to 1803 Director of the newly established schoolteacher seminar, author of the books *Elements of methods and pedagogy together with brief elucidations of them* (*Elemente der Methodik und Pädagogik nebst kurzen Erläuterungen derselben*, 1791), *Outline of school educational lore* (*Entwurf der Schulerziehungskunde*, 1794)<sup>9</sup>.

In Lower Austria, Franz de Paula Gaheis (1763-1809), from 1788 to 1798 Director of the newly founded main school (*Hauptschule*) in Korneuburg with a related pedagogical course<sup>10</sup>, author of the *Handbook of the teaching art for the first instruction in German schools* (*Handbuch der Lehrkunst für den ersten Unterricht in deutschen Schulen*, 1797; 4<sup>th</sup> improved edition 1809).

In Vienna, Josef Peitl (1762-1830), from 1789 teacher of candidates for admission to teacher training programs at the teacher training main school

Herausgegeben von der österreichischen Gruppe der Gesellschaft für deutsche Erziehungs- und Schulgeschichte, IV. Heft), 1902, p. 132; U. Krömer, *Johann Ignaz von Felbiger. Leben und Werk*, Freiburg, Herder, 1966, p. 241; H. Engelbrecht, *Geschichte des österreichischen Bildungswesens. Vol. 3: Von der frühen Aufklärung bis zum Vormärz*, Wien, Österreichischer Bundesverlag, 1984, p. 106.

<sup>9</sup> Panholzer (ed.), *Johann Ignaz von Felbigers Methodenbuch. Mit einer geschichtlichen Einleitung*, cit., pp. 104-107; A. Weiss, *Geschichte der Österreichischen Volksschule unter Franz I. und Ferdinand I. 1792-1848*, Graz, Styria, 1904, pp. 698 f.; M. Cipro, *Slovník Pedagogu*, Prag, 2001, p. 362 f. (Czech); W. Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, 4 voll., Wien, Verlag der Österreichischen Akademie der Wissenschaften, Vol. II, 2003, p. 116. L. Glöckl, *Franz Michael Vierthalers Ausgewählte pädagogische Schriften*, Freiburg im Breisgau, Herder (Bibliothek der katholischen Pädagogik, VI), 1893; Weiss, *Geschichte der Österreichischen Volksschule unter Franz I. und Ferdinand I. 1792-1848*, cit., p. 691; M. Laireiter (ed.), *Franz Michael Vierthaler. Festschrift zum 200. Geburtstag am 25. September 1958*, Salzburg, Pädagogisches Institut, 1958; Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., vol. III, 2008, p. 34.

<sup>10</sup> Weiss, *Geschichte der Österreichischen Volksschule unter Franz I. und Ferdinand I. 1792-1848*, cit., p. 695; R. Gönner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, Wien, Österreichischer Bundesverlag, 1967, p. 88; Engelbrecht, *Geschichte des österreichischen Bildungswesens. Vol. 3: Von der frühen Aufklärung bis zum Vormärz*, cit., pp. 111, 214; Boyer, *Elementarschulen und Elementarunterricht in Österreich. Illustrierte Chronik der Schul- und Methodengeschichte von den ältesten Quellen bis zum Ende des 19. Jahrhunderts*, cit., p. 123.

(*Präparandenlehrer an der Normalhauptschule*) and after 1823 its Director<sup>11</sup>, author of the *Methods book or guide for the practical management of the teaching position for teachers in trivial and main schools* (*Methodenbuch oder Anleitung zur zweckmäßigen Führung des Lehramtes für Lehrer in Trivial- und Hauptschulen*, 1820). It was required by the Imperial Commission on Education (*Studienhofkommission*) as an official textbook for all Austrian provinces. Already in 1821 a translation adapted for Italian schools was published by the Director of the Milan teacher training school, Francesco Cherubini<sup>12</sup>.

Peitl's work adhered closely to the *Political constitution of the German schools* (*Politische Verfassung der deutschen Schulen*), decreed in 1806 by Emperor Franz I. It took the place of the 1774 *General School Ordinance* (*Allgemeine Schulordnung*). Peitl's textbook was revised in 1848 and continued to be used for the preparation of candidates for teacher training, even after the Revolution<sup>13</sup>. Like the textbooks of his predecessors, it did not offer an empirically and philosophically based theory of instruction, but rather school lore (*Schulkunde*) with practical rules of wisdom for teachers on a religious and patriotic foundation.

## 2. Pedagogy in the training of theologians

Academic lectures on pedagogy were first introduced for theology students at Austrian universities and educational institutions. They had to be prepared for the clerical profession. This also included, from the state viewpoint in the Age of Absolutism, the education of the people (*Volkserziehung*) in its entire range, with preaching and religious instruction as the main means of moral, life skills and civic education.

For this purpose, in 1774 the discipline of pastoral theology was introduced at all theological educational institutions with the sub-disciplines of homiletics (*Predigtkunde*) and catechetics (*Religionsunterrichtslehre*)<sup>14</sup>. In all school types, religious instruction had to be given in principle by priests<sup>15</sup>. They were required

<sup>11</sup> Weiss, *Geschichte der Österreichischen Volksschule unter Franz I. und Ferdinand I. 1792-1848*, cit., p. 738; Gönner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, cit., p. 92.

<sup>12</sup> Weiss, *Geschichte der Österreichischen Volksschule unter Franz I. und Ferdinand I. 1792-1848*, cit., p. 749; S. Polenghi, *La formazione dei maestri nella Lombardia austriaca*, in Ead., *La scuola degli Asburgo. Pedagogia e formazione degli insegnanti tra il Danubio e il Po (1773-1918)*, Torino, Società Editrice Internazionale, pp. 45-89.

<sup>13</sup> Gönner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, cit., p. 125.

<sup>14</sup> Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., p. 30.

<sup>15</sup> General School Ordinance (*Allgemeine Schulordnung*) 1774, § 6: *Instruction in religion*



by the state to do school service and had to take examinations in catechetics and methods. At that time, “methods” meant the theory of instruction for primary schools in the sense of Felbiger’s *Methods book* (*Methodenbuch*). Religious instruction was the topic of the first chapter. Of all subjects, it received the most space<sup>16</sup>. The school practice training of theology students was provided in “catechetical-pedagogical lectures” and exercises at teacher training schools and main schools by the local catechists, who belonged to the elite clergy.

After 1804 the pedagogical training of the clergy became even more important than previously, because the school supervision of the lower level schools was transferred to the Church by Emperor Franz I<sup>17</sup>. In the rural areas, only the Church had the personnel to implement with parents the school attendance requirement for all children and to provide suitable equipment and supplies for community schools. The state desired with this regulation to save personnel costs and at the same time to exert ecclesiastical influence on the people as a bulwark against revolutionary movements. The secularization of the school system, which began under the enlightened absolutism of Josef II, was rescinded in the Age of Metternich (*Vormärz*) in favor of the Catholic Restoration<sup>18</sup>.

Because of the increased tasks of priests as superiors of primary school teachers, their practical training in catechetics and methods (understood as pedagogy for primary schools) no longer sufficed. Consequently, in the theological curriculum of 1804 for the first time a preliminary lecture on «educational lore» (*Erziehungskunde*) was required. This discipline was understood as a scientific pedagogy supported by the «spirit of observation and experience»<sup>19</sup>.

For this new subject, in accord with the Philosophical Study Regulations of 1805, step-by-step a separate chair was set up in philosophical faculties and colleges<sup>20</sup>. Theology students had to study this subject there. They had to earn

*is reserved in all schools for the clerics*, in J. Panholzer (ed.), *Johann Ignaz von Felbigers Methodenbuch. Mit einer geschichtlichen Einleitung*, cit., p. 300.

<sup>16</sup> *Ibid.*, pp. 144-165.

<sup>17</sup> Engelbrecht, *Geschichte des österreichischen Bildungswesens. Vol. 3: Von der frühen Aufklärung bis zum Vormärz*, cit., p. 226; Brezinka, *Österreichs Volksschullehrer und ihre Ausbildung im Spannungsfeld zwischen Staat und Kirche 1774-1869*, cit., pp. 530-544.

<sup>18</sup> G. Strakosch-Grassmann, *Geschichte des österreichischen Unterrichtswesens*, Wien, Pichler, 1905, p. 141; Gönner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, cit., p. 60; H. Rumpler, *Eine Chance für Mitteleuropa. Bürgerliche Emanzipation und Staatsverfall in der Habsburgermonarchie*, Wien, Überreuter, 1997, pp. 92, 111.

<sup>19</sup> Philosophischer Studienplan 1805, 36h.

<sup>20</sup> Point 36h of the Study Plan. Hofkanzlei-Decret of August 9, 1805. Reprint in W. Unger, *Systematische Darstellung der Gesetze über die höheren Studien in den gesammten deutsch-italienischen Provinzen der österreichischen Monarchie*, Wien, Gerold, 1840, p. 497; Wotke, *Vincenz Eduard Milde als Pädagoge und sein Verhältnis zu den geistigen Strömungen seiner Zeit. Eine cultur- und quellengeschichtliche Einleitung in seine “Erziehungskunde”*, cit., p. 87; Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, Vol. I, p. 36.

an examination certificate, which was one of the requirements for admission to holy orders. It was expressly emphasized, however, that in this secular subject, «the religious subject matter must remain untouched, because these subjects, as well as the methods of dealing with them are treated specially in their own pedagogical and catechetical lectures for clerics and secular candidates for teacher training institutes».

This 1805 imperial decree was the statutory birth certificate of pedagogy as an independent university discipline in the frame of the old style philosophical faculties. By «old style» is meant that the «generally educating» colleges were like upper-level secondary schools that had to prepare students in two to three years for actual academic studies at the higher professionally faculties for theology, jurisprudence and medicine. Their “students” were usually no more than 16 to 18 years old and were treated like pupils<sup>21</sup>.

### 3. *Pedagogy for the training of tutors*

The first chairs for pedagogy were originally also intended to prepare students for the private education of the children of the nobility and the well-to-do bourgeoisie<sup>22</sup>. At that time it was customary in the upper classes for parents to avoid public schools and have their children educated at home by private tutors or «educational assistants»<sup>23</sup>.

The justification in the 1805 study regulations was: «From time immemorial, young people have competed for tutoring positions who themselves had no education and did not even know what was involved. Through their entirely inappropriate and harmful practice, the inexperienced or professionally overburdened fathers or guardians, and thereby as well the state, were conned out of their best hopes. In order to avoid this evil and mischief, in the future no one should assume the honorable office of educator who has not attended the here required lectures on pedagogy and acquired a certificate of good progress»<sup>24</sup>.

We see clearly in this statement of reasons that at the chairs for pedagogy there was from the start great tension between the two responsibilities

<sup>21</sup> Engelbrecht, *Geschichte des österreichischen Bildungswesens*. Vol. 3: *Von der frühen Aufklärung bis zum Vormärz*, cit., p. 277; R. Meister, *Entwicklung und Reformen des österreichischen Studienwesens*, Vienna, Böhlau (Sitzungsberichte der Österreichischen Akademie der Wissenschaften, Phil.-hist. Klasse, Bd. 239), 1963, p. 45; Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., p. 25.

<sup>22</sup> Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., p. 34.

<sup>23</sup> A.H. Niemeyer, *Grundsätze der Erziehung und des Unterrichts für Eltern, Hauslehrer und Schulmänner*, Halle, Waisenhaus, 1805, 5. Auflage, p. 100.

<sup>24</sup> Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., p. 36.

of their professors: they should provide, on the one side, a theoretically sophisticated general presentation of educational problems in a systematic form on a philosophical-psychological foundation; on the other side, an easily understandable practical guide to the art of correct educational action in individual cases in concrete situations. This tension between two different tasks characterizes the history of the pedagogical discipline at universities from the beginnings up until today.

#### 4. *Tasks and performance of university pedagogues between teacher training and educational research*

Austria was the first country in the world that after 1805 set up chairs for «educational lore» at all its universities and philosophical institutes<sup>25</sup>. In all there were eighteen professorships between Vienna and Pavia, Lvov and Gorizia<sup>26</sup>. That was, at the time of the Napoleonic wars and continuing financial crises, a great cultural-political accomplishment.

But it should not be overestimated. For about a century, university pedagogy remained a small, minor subject, from which no professor could entirely support himself. The “chair” dedicated to it was never more than a permanently established lectureship for two weekly hours. In order to support himself, a professor had to have on the average eight weekly lecture hours. Thus a pedagogical professor needed either an additional lectureship for at least six weekly hours in a main subject or a source of income outside the university.

This circumstance compromised the commitment to the minor subject, especially as the public standing of «educational lore» as a mere practical teaching of a skill was lower than that of the scientific disciplines. Already for these reasons the new chairs were hard to fill. Their occupants did not want to make the teaching of pedagogy a lifelong profession. Therefore, suitable candidates were hard to find. As a result, “educational lore” (*Erziehungskunde*) was much more often taught by representatives (*Supplenten*) from other subjects than by actual professors of this subject. They remained in their posts on the average no longer than three years. Under these circumstances, no suitable successor generation for the discipline could develop. University pedagogy did not survive Vormärz (*Age of Metternich*) and the Revolution of 1848.

<sup>25</sup> On the basis of the new “Philosophischen Studienplan” of 9 August 9, 1805, printed in Unger, *Systematische Darstellung der Gesetze über die höheren Studien in den gesammten deutsch-italienischen Provinzen der österreichischen Monarchie*, cit., p. 497 and p. 510; Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., pp. 21, 25, 34, 233.

<sup>26</sup> *Ibid.*, p. 40.

In the great reform of the Austrian educational system under the first Minister of Instruction, Leo Thun-Hohenstein (1811-1888), the chairs for educational lore were abolished<sup>27</sup>. Only after 1871 were there again professorships for the subject of pedagogy in the Austrian part of the Habsburg Monarchy, at least at the large Universities of Vienna, Lvov and Prague. In the division of the University of Prague according to national languages in 1882, the Czech university immediately received a chair for philosophy and pedagogy. Graz followed only in 1904. Until the fall of Austro-Hungary, the number of chairs in the Austrian part remained at five, in the Hungarian part three (Budapest 1870, Klausenburg/Kolozsvár 1872, Agram/Zagreb 1894)<sup>28</sup>.

Thus in the history of the university discipline we can distinguish two very different periods: the period of practical «educational lore» from 1805 to 1848 and the period of «philosophical pedagogy» after 1871, during which the scientification of the discipline began.

#### 4.a. *University pedagogy as a practical «educational lore» (Erziehungskunde) after 1805*

The introduction of the subject was not initiated by the universities, but rather by the government. In the State Council, this was proposed and recommended already in 1771, when public interest in the reform of the educational system peaked in Europe<sup>29</sup>. Towards the end of the eighteenth century, the pedagogical controversy subsided. At the start of the nineteenth century, pedagogy was for the first time a relatively stable subject of study and instruction, from which benefits for educational practice were to be expected.

Regarded as the best textbook in the German regions was the work of a Protestant theology professor at the Prussian University of Halle, August Hermann Niemeyer (1754-1828), *Foundations of education and instruction for parents, tutors and schoolmen (Grundsätze der Erziehung und des Unterrichts für Eltern, Hauslehrer und Schulmänner)*. It was published in 1796 and by 1824 there were eight editions, which were frequently expanded and improved. It contained an eclectic system of practical pedagogy based on experience in the sense of the self-critically chastened German Late Enlightenment, and was also used in Austria. The Viennese government sought a textbook, however, that

<sup>27</sup> *Ibid.*, 75.

<sup>28</sup> *Ibid.*, p. 105; A. Németh, *Die Entwicklung der Pädagogik zur Universitätsdisziplin, sowie ihre Institutionalisierung an der Universität in Budapest*, in K.P. Horn, A. Németh, B. Pukánsky, H.E. Tenorth (edd.), *Erziehungswissenschaft in Mitteleuropa*, Budapest, Osiris Kiadó, 2001, pp. 309-345.

<sup>29</sup> By the Bohemian Baron Franz Karl Kressel; von Helfert, *Die Gründung der österreichischen Volksschule durch Maria Theresia*, cit., p. 240; Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., p. 15.

was adapted to the particular Austrian circumstances and the *Philosophical Study Plan* of 1805.

It had the rare good fortune in 1806 to be able to excellently fill the first chair in educational lore at the University of Vienna: with the 28-year-old religion teacher at the Viennese secondary modern school (*Normalhauptschule*) Vincenz Eduard Milde (1777-1853)<sup>30</sup>, who had proved himself in the chair for catechetics and pedagogy for prospective clerics. He already withdrew after four years to a pastoral office and there in quiet surroundings wrote an outstanding work: the *Textbook of general educational lore for use in public lectures (Lehrbuch der allgemeinen Erziehungskunde zum Gebrauche der öffentlichen Vorlesungen)*. It is 964 pages long and was published in 1811 and 1813 in two volumes. In 1814 it was made mandatory as an official textbook for all pedagogical chairs in Austria. It contained a solid system of practical pedagogy with an empirical-psychological foundation in the exoteric style of popular philosophy in the Late German Enlightenment<sup>31</sup>. In its core it consisted of a realistic anthropology and teaching of methods – including a pedagogical «healing lore» for spiritual disorders and was enhanced with guidance in educational self-improvement. It was based on the extensive anthropological and pedagogical literature of the time, with an excellent selection of the essential, and especially on Niemeyer<sup>32</sup>.

Milde, like Niemeyer and other authors, had already referred to pedagogy as «educational science» (*Erziehungswissenschaft*)<sup>33</sup>. They understood this as a general «theory of educational laws»<sup>34</sup> – not in the sense of natural laws, but rather of «basic principles» or universal rules for education based on experience. The content of their pedagogy was, in the then current understanding, of a scientific or academic sort. They saw their task not in research as a quest for special new knowledge, but rather in the critical evaluation, selection, organization and promulgation of existing knowledge for the use of educational practitioners in families, schools and churches.

«Pedagogy and didactics» were for them not independent or original sciences, but rather «derivative sciences»<sup>35</sup>. Their sources lay, on the one side,

<sup>30</sup> *Ibid.*, p. 233; H. Holtstiege, *Die Pädagogik Vincenz Eduard Milde 1777-1853* [Wiener Beiträge zur Theologie], Wien, Wiener Domverlag, 1971.

<sup>31</sup> On their characteristics and significance for mass education see H. Holzhey, *Popularphilosophie*, in *Historisches Wörterbuch der Philosophie*, Vol. 7, Basel 1989, pp. 1093-1100; C. Böhr, *Philosophie für die Welt. Die Popularphilosophie der deutschen Spätaufklärung im Zeitalter Kants*, Stuttgart, Frommann, 2003.

<sup>32</sup> Evidence in Wotke, *Vincenz Eduard Milde als Pädagoge und sein Verhältnis zu den geistigen Strömungen seiner Zeit. Eine cultur- und quellengeschichtliche Einleitung in seine "Erziehungskunde"*, cit.

<sup>33</sup> V.E. Milde, *Lehrbuch der allgemeinen Erziehungskunde zum Gebrauche der öffentlichen Vorlesungen (Erster Teil)*, Wien, Rötzl und Kaulfuß, 1811, § 36, p. 46 (last edition: K.G. Fischer ed., Paderborn, Schöningh, 1965, p. 45; Niemeyer, *Grundsätze der Erziehung und des Unterrichts für Eltern, Hauslehrer und Schulmänner*, cit., p. 18.

<sup>34</sup> *Ibid.*

<sup>35</sup> *Ibid.*, p. XVII.

in empirical anthropology and psychology, and, on the other side, in moral philosophy or ethics. For Milde, psychology was even «the only foundation on which a science of education can be built»<sup>36</sup>; it «is [...] the source of pedagogy»<sup>37</sup>. For argumentative support, however, key texts of great writers from Plato to the present were drawn upon<sup>38</sup>.

The scientific character of the «general educational lore» (*allgemeine Erziehungskunde*), taught at the philosophical faculties, was already emphasized in contrast to elementary primary school methods, which were taught to theologians in «catechetic-pedagogical instruction» by the catechists of the secondary schools (*Hauptschulen*). A decree of the Court Educational Commission (*Studien-Hofcommission*) of January 7, 1814 states in this regard: «Pedagogical instruction must practically represent the handling of youth in the schools [...], and through this practical tendency must essentially differentiate itself from the [...] prescribed instruction in educational lore (*Erziehungskunde*), which contains the principles of the training of youth in general scientifically»<sup>39</sup>.

What effects did this early academic pedagogy have on teacher training through the academic chairs dedicated to it? Milde's work was not a book for people lacking a secondary school education, but in his own words, «a textbook for philosophical lectures» to hearers that have already «attended lectures on theoretical and practical philosophy»<sup>40</sup>. These were chiefly theologians, among them as well many future secondary school teachers and professors of philosophical institutes, because after 1804 the Gymnasia were again assigned to the Catholic orders<sup>41</sup>.

Until the late nineteenth century, the clergy had the longest and relatively best pedagogical-didactic training of all professional groups. The foundation was «general educational lore» (*Allgemeine Erziehungskunde*), with two weekly hours throughout a school year. Developed upon this basis was «catechetics» as a teaching methodology of religious instruction with three weekly hours and «methods» as practical «primary school pedagogy» (*Volksschulpädagogik*) with two weekly hours. In today's reckoning that amounted to 14 semester weekly

<sup>36</sup> Milde, *Lehrbuch der allgemeinen Erziehungskunde zum Gebrauche der öffentlichen Vorlesungen (Erster Teil)*, cit., p. XIV (ed. 1965, p. 11).

<sup>37</sup> *Ibid.*, p. 47, (ed. 1965, p. 45).

<sup>38</sup> Thus Niemeyer 1813 also published an important collection of the *Original positions of Greek and Roman classics on the theory of education and instruction. For pedagogical and philological seminarians and as a supplement to the historical part of his 'Principles'* [Originalstellen griechischer und römischer Klassiker über die Theorie der Erziehung und des Unterrichts. Für pädagogische und philologische Seminarier und als Beilage zum geschichtlichen Teil seiner ‚Grundsätze‘] (2<sup>nd</sup> ed. 1898 by R. Menge).

<sup>39</sup> Unger, *Systematische Darstellung der Gesetze über die höheren Studien in den gesammten deutsch-italienischen Provinzen der österreichischen Monarchie*, cit., p. 40. Author's emphasis.

<sup>40</sup> Milde, *Lehrbuch der allgemeinen Erziehungskunde zum Gebrauche der öffentlichen Vorlesungen (Erster Teil)*, cit.

<sup>41</sup> List in Ficker, *Österreich*, cit., p. 391; Id., *Geschichte, Organisation und Statistik des österreichischen Unterrichtswesens*, cit., p. 129.

hours with semester examinations as a necessary condition for admission to holy orders (*ordination*)<sup>42</sup>.

Along with these required pedagogical subjects came the study of «pastoral theology» with 18 weekly semester hours for contents that were not only pastorally, but also pedagogically significant. Not to be overlooked are rhetorical training for speakers, which is so important for teachers, and rigorous guidance in self-education. This all makes it understandable that the dominance of theologians among the early pedagogues in Catholic and Protestant countries was also connected with their special fitness and not just with political power relationships.

The government expected from the early chairs in educational lore that through the «attendance of lectures on this science [...] bit by bit [...] better and more correct educational principles» are «to be made dominant» in schools and families. It was thereby grounded especially on «theologians as future overseers and leaders of the primary schools». This was stated in a Court Chancellery Decree of 1808 for the Universities of Vienna, Prague and Cracow<sup>43</sup>.

This indirect path to the continued education of primary school teachers by clergy was very uncertain, because the prior knowledge of teachers was inadequate, and their basic training of three to six months in courses for candidates for admission to teacher training was far too brief<sup>44</sup>. Pedagogical instruction there was limited to the «normal teaching method» according to Peitl's «*Methods book*». Even this minimal training in methods often had to yield to instruction in the subjects taught in primary schools, in order to make up for inadequate knowledge. All the prerequisites for training and continued education on the level of Milde's academic textbook were lacking. It was too difficult and too comprehensive for this.

What was Milde's influence on the teacher trainers for the lower-level school system? As leaders of the courses for candidates for admission to teacher training, as a rule the directors of model or district secondary modern schools were secondarily active. For them knowledge of the *Methods book* sufficed for

<sup>42</sup> Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit.

<sup>43</sup> Hofkanzlei-Decret of December 15, 1808, Zahl 23489, in Unger, *Systematische Darstellung der Gesetze über die höheren Studien in den gesammten deutsch-italienischen Provinzen der österreichischen Monarchie*, cit., p. 510.

<sup>44</sup> Proof in Gönner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, cit., 1967, p. 71; A. Stoll, *Geschichte der Lehrerbildung in Tirol. Von den Anfängen bis 1870*, Weinheim-Berlin, Julius Beltz Verlag, 1968, p. 160. Course length for teachers of trivial schools only three months at a secondary modern school (*Hauptschule*) in each district; entrance prerequisite was the graduating from a trivial school (*Trivialschule*) (only after 1832 was successful completion of the third secondary modern school class required). For teachers in secondary modern schools a course length of six months at the normal or model secondary school of the state (*Normal- or Musterhauptschule*); only at the Viennese normal secondary school (*Normalhauptschule*) did the course last nine months. Political Constitution of the German schools, 5<sup>th</sup> ed. 1821, VIII, §§ 7-12, p. 50.

pedagogical-methods instruction. Insofar as they were laymen, they had mainly attained their office from the teaching profession without academic study, thus also without lectures and examinations on Milde's textbook. Only the clergy among them were familiar with it through their theological curriculum. For laymen only private reading would have been possible.

Milde's textbook thus presumably reached primary school teachers only in exceptional cases. At the universities, the state regulations and their strict control had advantages and disadvantages. One advantage was that for pedagogy at all philosophical scholastic institutions a relatively high quality of instruction was made possible. But it also had the disadvantage of handicapping the initiative of teachers and students to make a critical examination of the texts and up-to-date improvements. Lacking in the police state of the Age of Metternich (*Vormärz*)<sup>45</sup> were academic freedom, in-depth studies, research, provision for the next academic generation, bridge-building to primary-school pedagogy and to non-academic teacher trainers of courses for candidates for admission to teacher training (*Präparandenkurse*) at the normal secondary modern schools (*Normal-Hauptschulen*).

For strategic reasons the minor subject of «educational lore» was linked after 1824 with the chair for the «science of religion». That was the extravagant new name for religious instruction, which in 1804 was made a required subject for students of the philosophical department in all age groups for the first time<sup>46</sup>. With the reform of universities after the Revolution of 1848 this was abolished. The religion professors were relocated as secondary school teachers in the reformed Gymnasia.

After the Revolution of 1848 the universities were transformed from pure teaching institutions into institutions for scientific research and teaching. «Educational lore» (*Erziehungskunde*) was not regarded as science in the modern sense and was left out of consideration in the new organization of chairs.

#### 4.b. *University Pedagogy as “Philosophical Pedagogy” from 1871 to 1918*

After the 1848 Revolution, in the reorganization of studies for teaching positions at secondary schools, neither a required lecture course nor an examination in pedagogy were required<sup>47</sup>. It was left to students how they would acquire pedagogical knowledge and ability. It was at the discretion of philosophy professors, whether they would occasionally offer a pedagogical lecture course, which happened only rarely. At the University of Vienna,

<sup>45</sup> See V. Bibl, *Der Zerfall Österreichs. Kaiser Franz und sein Erbe*, Wien, Rikola, 1922, p. 254 on the persecution of demagogues (*Demagogenverfolgung*).

<sup>46</sup> Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., pp. 26, 39.

<sup>47</sup> *Ibid.*, p. 141.



between 1850 and 1865, there was no course offering in pedagogy during 25 of 30 semesters. This situation was indefensible for the school authorities.

The political stimulus to take remedial action came from the Imperial Assembly (*Reichsrat*) on the occasion of consultation on the Imperial Primary School Law (*Reichsvolksschulgesetz*) of 1869. This finally assured the training of primary school teachers at teacher training institutes with the core subject of *Educational and Instructional Theory, their History and Auxiliary Sciences*. Secondary school teachers were not to be left behind. Thus in 1871/72 the first three chairs for «pedagogy» were created.

The discipline was, as previously, a minor subject and regarded as part of philosophy. This was indisputable, because its content stemmed largely from psychology and moral philosophy. Until the mid-twentieth century, psychology was still considered a sub-discipline of philosophy. Thereby it is also understandable that the new chairs were originally often named together with the parent subject of philosophy and – to reduce costs – entailed both the authorization to teach and the responsibility to teach both subjects. Their close relationship was also apparent in that at small universities without a full or with only a half pedagogical chair, pedagogy was taught by a philosophy teacher as a secondary lectureship. The relationship remained self-evident until the late twentieth century, as well in the examination requirements for the lectureship and doctorate<sup>48</sup>.

It is essential that the chief official task of pedagogy professors consisted for about a century in giving teacher trainees an elementary introduction to «general pedagogy». This was understood to mean: «tenets of education and instruction», as well as «history of the same since the 16<sup>th</sup> century»<sup>49</sup>.

According to the wording, this obligatory subject area of university pedagogues did not differ from that which was prescribed at teacher training institutes for primary school teachers: theory of education, theory of instruction, history of pedagogy. What was the actual situation with the learning content of the subject at universities and the contributions of professors to its improvement through pedagogical research?

The name «pedagogy» as opposed to «educational lore» (*Erziehungskunde*) had several senses. It left its first professors great latitude in the choice of

<sup>48</sup> See among others the *Examination requirements for the teaching position at secondary schools of March 17, 1928* [Prüfungsvorschrift für das Lehramt an Mittelschulen vom 17. März 1928], Article V, 2: «Every candidate for a teaching position must (besides pedagogy) attend: [...] two at least respectively three hour lecture courses from philosophy, including one from the field of psychology» [Jeder Lehramtsanwärter hat (neben Pädagogik) zu hören: [...] zwei mindestens je dreistündige Vorlesungen aus Philosophie, darunter eine aus dem Gebiete der Psychologie]. See P. Mosser, T. Reitterer (edd.), *Die für das Mittelschullehramt geltenden Prüfungsvorschriften*, Wien, Österreichischer Bundesverlag, 1934, p. 11.

<sup>49</sup> Ministerial decree of 1911 (Ministerialverordnung) in Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., p. 150.

the teaching contents and methods of their field of work. They could choose «scientific pedagogy» in the modern understanding or «practical pedagogy».

By «practical pedagogy» was then meant the educational theories «that are initially most sought after in life»<sup>50</sup>. These were and still are those that deal using case examples with concrete educational tasks in special life relationships such as in families, schools, and social care institutions. For the training of future secondary school teachers, this was «gymnasium pedagogy» or – in Austria – «secondary school pedagogy» (*Mittelschulpädagogik*)<sup>51</sup>, analogous to «primary school pedagogy» (*Volksschulpädagogik*). Practical pedagogy concentrated on requirements, instructions and advice for educational action under the particular local and temporal conditions of a special educational field of work. It was not a science, but rather a teaching of an art (*Kunstlehre*): the teaching of the art of education and as such much older than scientific pedagogy.

This was in the nineteenth and early twentieth centuries only programmatically and rudimentarily present. Its development into a full-fledged scientific university subject was the most important task of its few professors. If it was not achieved, there was no prospect of winning a competent successor generation for the pedagogy chairs of universities and the teaching personnel of the new teacher training institutes.

Otto Willmann aptly described the need for scientifically well-trained pedagogues in an 1871 memo to the Minister of Instruction<sup>52</sup>:

From the academic youth originate not only the directors and teachers of the secondary schools, but also those of the teacher seminaries and the inspectors of the primary and secondary schools (*Inspektoren der Volks- und Bürgerschulen*). Shortcomings of the secondary school system (*Gymnasialwesens*) such as: Overloading with teaching material, inadequate teaching of classical studies with modern knowledge needs would be corrected if men familiar with the problems of the concentration of instruction and the linkages of subjects of instruction taught at Gymnasia. The *teacher seminaries* need even more urgently (than the Gymnasia) pedagogically well-trained teaching personnel; mere pundits do not know the parts of their science that are fruitful for the teaching profession, do not understand how to give their students joy in learning, are in the end at a loss in the face of the wasteland of primary school literature, from which they then take up the first thing that appeals to them in order to get an idea of elementary instruction. *School inspection* finally, will remain in the hands of either inadequately prepared school teachers or school-versed clerics, who already through their office are guided toward teaching and instruction, until the universities release scientifically thoroughly trained pedagogues.

About fifty years passed from the establishment of the new chairs for pedagogy until the decline of the Habsburg Monarchy. What did the first generation of

<sup>50</sup> K.V. Stoy, *Encyclopädie der Pädagogik*, Leipzig, Engelmann, 1861, p. 20, p. 213.

<sup>51</sup> *Ibid.*, p. 308. Exemplary for Prussia Matthias 1903, for Austria Jerusalem 1912.

<sup>52</sup> *Promemoria of December 18, 1871 for Minister Karl von Stremayr* (1823-1904), reprint in Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., p. 890. Addition in parentheses by Author.

their professors accomplish in order to obtain «scientifically thoroughly trained pedagogues»? There was a great discrepancy between this task and the basic conditions for its fulfillment. Above all it was not clear which characteristics in what rank order the «scientifically thoroughly trained pedagogue» should have and through what sort of science they were to be acquired.

There were only seven individuals in Austria who belonged to the first generation of university professors for pedagogy: Theodor Vogt (1835-1906) from 1871 until 1906 in Vienna; Eusebius S Czerkawski (1822-1896) from 1871 until 1892 in Lemberg (Lvov); Otto Willmann (1839-1920) from 1872 until 1903 in Prague; Gustav Adolf Lindner (1828-1887) from 1882 until 1887 at the Czech University of Prague; Alois Höfler (1853-1922) from 1903 at the German University of Prague, from 1907 until 1922 in Vienna; Wendelin Toischer (1855-1922) from 1909 until 1922 at the German University of Prague; Eduard Martinak (1859-1943) from 1904 until 1930 in Graz<sup>53</sup>.

Each of these professors made noteworthy contributions. These were in various subareas that from today's viewpoint had greater or lesser significance for the two main tasks: introduction to all of the theories of education and instruction, as well as their history, for teaching position students, on the one side, research for the purpose of a true scientification of the discipline<sup>54</sup>, on the other side.

Seen precisely, in view of the scope of the subject and the difficulty of doing research on it, already a century before, it was an excessive burden to assign two such difficult tasks to a single scholar. In the largest German Lexicon, one could already in 1906 read the following: «The life and activity of contemporary pedagogy is so rich and multiform that it escapes any clear representation»<sup>55</sup>. Already in 1846 Karl Mager asserted: «The greatest genius of the world, who should as a professor deal with and teach all of pedagogy, would be condemned to superficiality. [...] We all, who previously wrote about pedagogy and still write, are [...] completely inadequate for the actual task, and we would have to practice witchcraft, were it otherwise»<sup>56</sup>.

I can only point out here the most important pedagogue of the first generation: Otto Willmann. No other academic was so early and so thoroughly prepared for pedagogical research and teaching: through broad philological, historical and philosophical studies, turning early to philosophical as well as to practical pedagogy, years of research-oriented instructional practice in primary

<sup>53</sup> Detailed assessments in Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., pp. 271-328; vol. II, pp. 21-101, 154-169.

<sup>54</sup> On the theory-related meaning of «scientification» (*Verwissenschaftlichung*) see W. Brezinka, *Die „Verwissenschaftlichung“ der Pädagogik und ihre Folgen. Rückblick und Ausblick*, «Zeitschrift für Pädagogik», vol. 61, 2015, pp. 282-294 (285).

<sup>55</sup> Meyers, *Großes Konversations-Lexikon*, 6<sup>th</sup> ed., vol. 15, Leipzig, 1906, p. 298.

<sup>56</sup> K.W.E. Mager, *Was ist Pädagogik?* in H. Kronen, in (ed), *Gesammelte Werke*, Baltmannsweiler, Burgbücherei Schneider, vol. 5, 1987, pp. 214-255 (222).

and secondary school classes as an assistant of Tuiscon Ziller (1817-1882) in the Pedagogical Seminar of the University of Leipzig and its tutorial school (*Übungsschule*). From there he was called in 1868 by the liberal Viennese Municipal Council to be a senior school master (*Oberlehrer*) and Director of the Tutorial School (*Leiter der Übungsschule*) at the new Pädagogium (scholars school) of Vienna. In 1872 he became at the age of 33 Professor for Philosophy and Pedagogy at the University of Prague and taught there until 1903. In 1876 he founded the first Pedagogical Seminar at an Austrian university<sup>57</sup>.

Willmann immediately dedicated himself with great energy to two tasks: to develop a new type of scientific system of general pedagogy on an empirical basis and a school-practice preliminary training of candidates for the teaching profession with particular regard to gymnasium subjects.

What was new was his attempt to design a system of «general pedagogy» as a descriptive and explanatory social science that differs radically from «practical pedagogy» as a theory of an art. Its task is necessarily normative, «imperative» or «postulatory»: «it gives rules and instructions». «General pedagogy, to the contrary, does not give regulations and instructions, but rather explains. It deals with that which is, it explains education as a fact according to its societal and psychic side»<sup>58</sup>. It is «descriptive-historical pedagogy»<sup>59</sup>.

This critical epistemological distinction was a great step forward in the history of the discipline. Unfortunately it was first published from among the author's posthumous works about a century later<sup>60</sup>. Even more regrettable is that Willmann soon abandoned it after a life-determining return to the mystery of the Catholic faith. He discontinued his initial work on a descriptive system of pedagogy on a social scientific foundation after the first sketches and engaged himself for a normative *Christian educational science* on an Aristotelian-Thomistic basis. This confessionalization of university pedagogy as a defense against the de-Christianization of modern culture hindered its development into an empirical science, detracted from its scientific standing and contributed to the world-view-political fissuring of the teaching profession.

<sup>57</sup> Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., pp. 21-48. Assessment from a Catholic viewpoint see F.X. Eggerdorfer, *Otto Willmann 1839-1920. Leben und Werk*, in O. Willmann, *Didaktik als Bildungslehre nach ihren Beziehungen zur Sozialforschung und zur Geschichte der Bildung*, Wien, Herder, 1957, 6<sup>th</sup> ed., pp. V-XXXIII.

<sup>58</sup> Lecture «General pedagogy» [Allgemeine Pädagogik] of 1875, in O. Willmann in *Sämtliche Werke*, von H. Bitterlich-Willmann (ed.), Aalen, Scientia, Vol. 4, 1980, p. 22.

<sup>59</sup> Lecture «Enzyklopädie der Pädagogik» of 1876, in Willmann in *Sämtliche Werke*, cit., p. 269.

<sup>60</sup> F. Pfeffer, *Die pädagogische Idee Otto Willmanns in der Entwicklung. System der wissenschaftlichen Pädagogik und Vorgeschichte der „Didaktik“*, Freiburg, Herder, 1962, p. 41 and p. 180; W. Brezinka, *Von der Pädagogik zur Erziehungswissenschaft: Eine Einführung in die Metatheorie der Erziehung*, Weinheim, Beltz, 1971, pp. 172; Id., *Metatheorie der Erziehung. Eine Einführung in die Grundlagen der Erziehungswissenschaft, der Philosophie der Erziehung und der Praktischen Pädagogik*, München, Reinhardt, 1978, p. 236.

Willmann withdrew from general pedagogy and specialized in didactics as a normative discipline. His main work was entitled “Didactics as a theory of education according to its relationships to social research and the history of education (*Didaktik als Bildungslehre nach ihren Beziehungen zur Sozialforschung und zur Geschichte der Bildung*) and was completed in 1888. It was an educational-philosophically demanding work, from which one can even today learn much culturally and school-historically. However, it was too academic and too difficult, too discursive and church-bound, to be used directly as a textbook or study book for teacher training<sup>61</sup>.

In contrast, Willmann contributed directly to the school-pedagogical training of gymnasium teachers through his *Prague Pedagogical Seminar* and the advisory opinions and texts dedicated to it. These texts still today reward reading<sup>62</sup>, because the problematic issues have changed little in 120 years. Through didactic discussions and practice at a Prague gymnasium, Willmann personally introduced hundreds of voluntary students to the subject-specific art of instruction. The planned special training of teaching personnel for teacher training institutions was, however, not authorized by the Ministry<sup>63</sup>.

Scientifically, after the conclusion of his *Didactics*, Willmann dedicated himself chiefly to a history of philosophy as a teaching of wisdom that corresponded to the Catholic tradition. This led between 1894 and 1897 to his three-volume *History of Idealism (Geschichte des Idealismus)*. By «true idealism», Willmann understood, drawing on Plato, a «worldview that counterpoises a supernatural order to the sensory»<sup>64</sup>. His imposing philosophical work was achieved at the cost of empirical scientific pedagogical studies. Consequently, Willmann's

<sup>61</sup> See as a school practice counterpole Gönner, *Die österreichische Lehrerbildung von der Normalschule bis zur Pädagogischen Akademie*, cit., p. 199 on textbooks for pedagogy instruction in teacher training institutes.

<sup>62</sup> O. Willmann, *Sämtliche Werke*, Herausgegeben von Heinrich Bitterlich-Willmann, voll. 1-7, Aalen, Scientia, 1968-1982; Id., *Motive zu dem Entwurf von Statuten für ein pädagogisches Seminar an der Prager Universität (1875)*, in *Sämtliche Werke*, cit., Vol. 4, 1980, pp. 146-152; Id., *Die Vorbildung für das höhere Lehramt in Deutschland und Österreich (1881)*, in *Sämtliche Werke*, cit., Vol. 4, 1980, pp. 614-630; Id., *Das Prager pädagogische Universitätsseminar in dem ersten Vierteljahrhundert seines Bestehens (1901)*, in *Sämtliche Werke*, cit., Vol. 7, 1982, pp. 533-552; Id., *Pädagogische Seminare an den Universitäten. Motive zu dem Entwurf einer Ministerialverordnung zur Ausführung von § 42 des Reichsvolksschulgesetzes*, in *Sämtliche Werke*, cit., Vol. 2, 1969, pp. 502-508; Id., *Pädagogische Seminare an den Universitäten. Motive zu dem Entwurf einer Ministerialverordnung zur Ausführung von § 42 des Reichsvolksschulgesetzes*, in *Sämtliche Werke*, cit., Vol. 2, 1969, pp. 502-508.

<sup>63</sup> Id., *Das Prager pädagogische Universitätsseminar in dem ersten Vierteljahrhundert seines Bestehens (1901)*, in *Sämtliche Werke*, cit., Vol. 7, 1982, pp. 533-552 (see 551).

<sup>64</sup> On the nature of the ideal worldview according to Willmann see B. Hamann, *Die Grundlagen der Pädagogik. Systematische Darstellung nach Otto Willmann*, Freiburg, Herder, 1965, p. 3, on «inauthentic idealism» in the history of philosophy: O. Willmann, *Geschichte des Idealismus. Dritter Band: Der Idealismus der Neuzeit. Braunschweig Vieweg*, 1897, pp. 206-372.

contribution to «raising pedagogy to a science»<sup>65</sup> turned out in the modern empirical sense to be less than his earlier program would lead us to expect.

This is also apparent in that during his 31 years in office not even one dissertation on a pedagogical theme was completed. At the University of Vienna it was not different under the first pedagogy professor, Vogt, over the course of 35 years. A doctorate was first earned in Prague in 1906 for a pedagogical dissertation under Willmann's successor Höfler<sup>66</sup>, the first at the University of Vienna in 1910<sup>67</sup>, the first at the University of Graz 1915 under Martinak<sup>68</sup>.

It is clear from Willmann's example how great the epistemological uncertainty was under which work on a scientification of pedagogy and its utilization for teacher training suffered. Purely empirical pedagogy remained largely a program. What had begun under this name in the old days in Austria under Höfler<sup>69</sup> and Martinak<sup>70</sup> was, as was the case in Germany under Ernst Meumann (1862-1915), psychology, but not pedagogy<sup>71</sup>.

Willmann had the great merit of having emphasized in a pluralistic society uncertain of its values that traditional religious and moral ideals and shared cultural "goods" would continue to be indispensable «as social binding forces»<sup>72</sup> for educational practice and the ethos of educators. He thereby supported himself on a vast number of philosophical and history of religion witnesses, without clearly distinguishing between rational knowledge and belief convictions, among science, philosophy and worldviews. Consequently, his pedagogical texts contain little empirical knowledge of real educational phenomena, their causal factors and effects under various different conditions. Instead, broad historical normative knowledge or «knowledge of principles» from natural and supernatural sources of «wisdom»<sup>73</sup> dominated in opposition to enlightenment, modernism, neo-paganism and «positivistic» science.

<sup>65</sup> Topic of a 1898 lecture, in O. Willmann, *Über die Erhebung der Pädagogik zur Wissenschaft*, Kempten, Kösel, 1898 and Id., *Der Lehrstand im Dienste des christlichen Volkes. Gesammelte Reden, Vorträge und Aufsätze*, Kempten, Kösel, 1910, pp. 67-92; Id., *Kleine pädagogische Schriften*, von J. Antz, E. Schoelen (edd.), Paderborn, Schöningh, 1959, pp. 39-56.

<sup>66</sup> Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit., vol. II, 2003, p. 90.

<sup>67</sup> *Ibid.*, vol. I, 2000, p. 321.

<sup>68</sup> *Ibid.*, vol. II, 2003, p. 161.

<sup>69</sup> *Ibid.*, p. 84; *ibid.*, vol. I, 2000, p. 310.

<sup>70</sup> *Ibid.*, vol. II, 2003, pp. 154.

<sup>71</sup> E. Meumann, *Die gegenwärtige Lage der Pädagogik*, «Zeitschrift für Pädagogische Psychologie und Experimentelle Pädagogik», vol. 12, 1911, p. 199; Id., *Abriss der Experimentellen Pädagogik*, Leipzig, Engelmann, 1920.

<sup>72</sup> Willmann, *Geschichte des Idealismus. Dritter Band: Der Idealismus der Neuzeit*, cit., p. 938.

<sup>73</sup> On «wisdom as the guiding theme of educational science [die Weisheit als Leitmotiv der Erziehungswissenschaft] for Willmann» see Hamann, *Die Grundlagen der Pädagogik. Systematische Darstellung nach Otto Willmann*, cit., p. 36; on «history as a source of pedagogical thinking» [Geschichte als Quelle pädagogischen Denkens], p. 63.

A young university discipline that through its then best known scholar appeared so immature could only with difficulty attract an excellent scientific successor generation. The idea of «wisdom» as a source of «genuine» pedagogical knowledge favored more unrealistic speculation than critical thinking and practice-relevant research.

Willmann's crusading engagement for an orthodox Catholic educational ideal and his conservative cultural critique had polarizing effects – not only on teachers and pedagogues, but also on broader educated circles far beyond Austria and Germany. Through this it became publicly even more visible than before that pedagogy is and presumably will remain an exceptional case among university subjects.

Why is this the case? Stated simply: due to the limitless mixture of tasks and objects between is and ought, reality and ideals, technique and ethics, observation and speculation, description and evaluation, eidetic vision and norm-setting, present and past, loyalty to tradition and belief in progress, neighborly assistance in I-thou relations and visions of world salvation through education, forming and «lifelong learning». Such an omnium gatherum gives the false impression of omniscience and universal authority in the sense of the utopian *pansophia*<sup>74</sup> and *panpaedia*<sup>75</sup> of Comenius (1592-1670).

With Otto Willmann, this universal «sapiential» mixed pedagogy reached its scholarly zenith and endpoint in the end phase of the Habsburg Monarchy. It was an idealistic «philosophical pedagogy» built on a Platonic-Christian foundation with excellent advice on didactic sub-questions. It was neither a descriptive-technological empirical science<sup>76</sup>, nor a practical pedagogy suitable for teacher training, nor a systematic normative philosophy of education, but rather a little from each with much cultural-historical knowledge as its hard core.

With this mixed, undifferentiated type of pedagogy in a one-person enterprise, until 1918 neither of the two tasks could be fulfilled for which pedagogy was introduced as a university subject: neither an improvement of teacher-training

<sup>74</sup> J.A. Comenius, *De rerum humanarum emendatione consultatio catholica. 2 volumes*, Prag, Academia Scientiarum Bohemoslovaca, 1966, Tomus I, Pars I, p. 227; W. Schmidt-Biggemann, *Pansophie*, in *Historisches Wörterbuch der Philosophie*, Vol. VII, Basel, Schwabe, 1989, pp. 56-59.

<sup>75</sup> J.A. Comenius, *De rerum humanarum emendatione consultatio catholica. 2 volumes*, Prag, Academia Scientiarum Bohemoslovaca, 1966, Tomus II, Pars IV, pp. 9; German: Johann Amos Comenius, *Pampaedia. Allerziehung*. In deutscher Übersetzung herausgegeben von Klaus Schaller, St. Augustin Academia Verlag, 1991; K. Schaller Klaus, *Pampaedia*, in *Historisches Wörterbuch der Philosophie*, Bd. VII, Basel, 1989, Schwabe, pp. 47 f.

<sup>76</sup> Generally on the failure of the «scientific aspiration» of nineteenth century pedagogues J. Oelkers, *Die große Aspiration. Zur Herausbildung der Erziehungswissenschaft im 19. Jahrhundert*, Darmstadt Wissenschaftliche Buchgesellschaft, 1989.

nor a research development of an independent, productive and highly respected educational science<sup>77</sup>. But that held not only for imperial Austria, but rather internationally.

<sup>77</sup> On the necessary differentiation into empirical educational science, philosophy of education and practical pedagogy, as well as on the rehabilitation of the latter see Brezinka, *Metatheorie der Erziehung. Eine Einführung in die Grundlagen der Erziehungswissenschaft, der Philosophie der Erziehung und der Praktischen Pädagogik*, cit.; Id., *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, cit.; Id., *Erziehung und Pädagogik im Kulturwandel*, München, Reinhardt, 2003; Id., *Pädagogik und Erziehungspraxis im Kulturwandel. Rückblick und Ausblick*, «Sodobna Pedagogika. Journal of Contemporary Educational Studies (Ljubljana)», vol. 63, n. 3, 2012, pp. 133-144; Id., *Österreichs Volksschullehrer und ihre Ausbildung im Spannungsfeld zwischen Staat und Kirche 1774-1869*, cit., pp. 530-544; Id., *The "scientification" of Pedagogy and its consequences. Retrospectives and prospects*, cit., pp. 235-248; Id., *Die „Verwissenschaftlichung“ der Pädagogik und ihre Folgen. Rückblick und Ausblick*, cit., pp. 282-294.



# Accomplishing «the silent mission of Italian women at war». The fascist “pedagogy of war” for women: from the kitchen front to the war garden\*

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**ABSTRACT:** This paper aims to analyse how, against the emergence of World War II, the countries involved in the conflict implemented an educational-propagandistic campaign aimed at mobilizing women in wartime. Both in democratic countries (such as Great Britain and the United States) and dictatorial regimes, this propaganda assumed similar forms and women's mobilization took the shape of a real call to fight on the domestic front, in its two dimensions of the «kitchen front» and the «war garden». As a result, there was a boom – also in Italy – in training courses, cookbooks, textbooks and popular texts, articles and columns in women's and general magazines etc. that focused on domestic savings, the fight against food waste, and the production of home-grown vegetables. The paper outlines the features of this pervasive ideological, propagandistic and educational machine

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targeted at Italian women, which was clearly based on the contingent need to support the Nation; nevertheless, it was used by the regime to defend a traditional model of the woman (as housewife, thrifty woman, exemplary mother and wife). A model that was destined to disintegrate in the post-war period, and paradoxically in virtue of the new self-awareness that women assumed with their active engagement during wartime.

EET/TEE KEYWORDS: War; Women's Education; Propaganda; Fascism; Italy; XX<sup>th</sup> Century.

### 1. *Premise. War comes into the kitchen*

Faced with the approaching Second World War, the countries involved put a propagandistic-educational campaign into practice which aimed to mobilize female energies in support of the Nation. Such propaganda resulted in massive recruitment of women who, on the home front, found themselves fighting a counteroffensive as important as that of the soldiers fighting on the front. Consequently, women were called to replace men in various jobs; at the same time, in addition to this public engagement of women, their private role and duties as housewives were considered no less important, as we will see.

In actual fact, in Anglo-Saxon countries female civil mobilization took its first organized forms during the Great War, with the establishment of the *Women's Land Armies*, through which women were called to give their service in agriculture<sup>1</sup>. Moreover, in the First as well as in the Second World War, other special internal fronts proved to be equally crucial such as the *Kitchen Front* (defined in 1941 by the British Minister of Food Lord Woolton), and the *Victory Garden* or *War Garden*<sup>2</sup>. In a context of extreme danger for the Nation, traditional female duties such as housekeeping and childrearing were no longer considered private matters but took on national importance and a key role for the country's economy, as much in wartime as in the reconstruction period<sup>3</sup>. In Great Britain and in the US, there arose a pervasive communicational-educational campaign addressed to women, which aimed at fighting against the waste of raw material, particularly food, by promoting frugal but nourishing cooking, and encouraging the production of home-grown vegetables. As a consequence, a series of *war-time cookbooks*, *victory cookbooks* and *wartimes recipes* flourished<sup>4</sup>, together with *victory garden handbooks* and *Dig for*

<sup>1</sup> Cfr. C. Gowdy-Wygart, *Cultivating Victory. The Women's Land Army and the Victory Garden Movement*, Pittsburgh, University of Pittsburgh Press, 2013.

<sup>2</sup> Cfr. T. Way, *The wartime garden. Digging for victory*, Oxford, Shire Publications, 2015.

<sup>3</sup> I. Zweiniger-Bargielowska, *Austerity in Britain: Rationing, Controls, and Consumption, 1939-1955*, Oxford, Oxford University Press, 2000, pp. 99-127.

<sup>4</sup> In the large Anglo-Saxon bibliography (very rich in cookbooks, recently reprinted and made popular by the current economic international crisis) I limit myself to refer, for the US field, to the books A. Bentley, *Eating for Victory. Food Rationing and the Politics of Domesticity*, Urbana and

*Victory leaflets*, which were issued within the *Dig for Victory* campaign by the British Ministry of Agriculture in 1939<sup>5</sup> and supported by popular BBC radio programmes for women (such as «The Kitchen Front», «Back to the Land» and «The Radio Allotment»)<sup>6</sup>.

After the tough experience of the Great War, in the Second World War women's involvement became a real leitmotiv of domestic policy in almost all warring countries. The common imperative to avoid waste and allocate resources for the war effort, was spread through an extensive campaign addressed to women and supported by all the mass media of the time: from posters to women's magazines, from broadcasts to government booklets, from school manuals to cookbooks for housewives. Although, at international level, this female recruitment shared the same objectives and apparently similar modalities, at national level it acquired distinctive characteristics according to the political, cultural and social environment in which the economic crisis caused by war was addressed in different countries<sup>7</sup>.

In such a context, also in Italy women's involvement on the home front took the shape of an analogous campaign. On the one hand, the regime was forced to promulgate laws which organized the recruitment of women in order to replace men in various sectors, from agriculture to industry, from public administration

Chicago, University Illinois Press, 1998 and J. Neuhaus, *Manly Meals and Mom's Home Cooking: Cookbooks and Gender in Modern America*, Baltimore, The Johns Hopkins University Press, 2003; and for Great Britain, the books by Marguerite Patten, nutritionist in the service of the Ministry of Food and creator of many war recipes (e.g. M. Patten, *Victory Cookbook: Nostalgic Food and Facts from 1940-1954*, London, Octopus Publishing Group, 2002), in addition to K. Knight, *Spuds, Spam and Eating for Victory: Rationing in the Second World War*, Stroud, The History Press 2011 (first ed.: 2007) and M. Brown, C. Harris, *The Wartime House. Home life in Wartime Britain, 1939-45*, Stroud, History Press, 2013.

<sup>5</sup> Regarding the campaign *Dig for Victory* cfr.: T. Way, M. Brown, *Digging for Victory. Gardens and Gardening in Wartime Britain*, Sevenoaks, Sabrestorm Publishing, 2010; Way, *The wartime garden. Digging for victory*, cit.

<sup>6</sup> *History of the BBC. Homefront programming 2*, <<http://www.bbc.co.uk/historyofthebbc/research/general/homefront-2>>, © 2016 BBC (last accessed: February 12<sup>th</sup>, 2016).

<sup>7</sup> An example of a "national declension" of war cooking is the case of Spain. During the Civil War, people spontaneously put in place a daily *cocina de guerra*, which was sometimes supported by official self-food production campaigns such as the *Batalla de l'ou* (The Battle of the Egg), promoted in 1936 by the Catalan Government (cfr. J. de D. Domènech, *La batalla de l'ou: de quan passàvem gana (1936-1939)*, Barcelona, Editorial Pòrtic, 2012). After the rise of Franco, however, the food crisis systematically passed unnoticed, in part due to the fact that it was caused by the autarkic policy of the regime. Particularly significant was the educational work – addressed to women and girls but not only – carried out in a hidden way by the renowned chef Ignacio Domènech, who in the 1940s published cookbooks marked by frugality, but never openly referred to the food crisis. These books escaped censorship because they were presented as autobiographical books, or inspired by traditional recipes, such as: *Cocina de recursos. Deseo mi comida* (1940); *La mejor cocina de cuaresma: ayunos y abstinencias* (s.d., reprint of a book of 1914); *Claudina sabe guisar* (s.d.) and so on. (cfr. Y. Acosta, *Cocina y crítica gastronómica de guerra y posguerra por Ignacio Domènech*, «The Food Studies», April 28, 2016 <<http://thefoodiestudies.com/cocina-y-critica-gastronomica-de-guerra-y-posguerra-por-ignacio-domenech/>>, (last accessed: February 12<sup>th</sup>, 2016).

to technical service, public care etc., according to their education, skills and specialization<sup>8</sup>. In addition to this public engagement of women, the regime did not forget the importance of the private involvement of the housewives but rather fully emphasized the female role in domestic saving, fighting waste in the kitchen, and the production of home-grown food. Compared to other democratic countries, in fact, the political and cultural Italian context gave life to distinctive actions that converged in a real, global and systematic so-called «pedagogy of war»<sup>9</sup> – that is to say a system of multifaceted educational practices put into action by Mussolini's regime in order to accomplish a pervasive militarization of Italian citizens and build a shared patriotic feeling around the theme of war.

With the aim to precisely reconstruct the pedagogy of war expressly addressed to women, the Authors examine different sources that demonstrate how the regime gave shape to a global and extensive action of propagandistic and educational nature (and of social control, at the same time). This action intended, on the one hand, to recognize, enhance (and consolidate) women's strategic role as mothers, wives and housewives, seen as “female soldiers” armed with suitable weapons in the kitchen “trench”. On the other, the same action was meant to instil in women, from childhood, the domestic (and civic) virtues that would be necessary to gain their total consent to the regime. In conclusion, such war pedagogy was to prevent future unpatriotic feelings in the wide female range of the civilian population that, in the time of a possible descent into war, would have to face tough repercussions in everyday life.

## 2. *Women, food and Fascism: “resistance cooking” in autarkic times*

The so-called «kitchen front» actually represented one of the scenarios in which the relationship between Fascism and women took concrete shape. The regime, in fact, adopted forms of female involvement which – though sometimes

<sup>8</sup> Emblematic is the law issued on the *Organization of the Nation for the war* (Law n. 969 of June 8, 1925) as well as the subsequent law, in 1931, on the *Discipline of citizens in war times* (Law n. 1699 of December 14, 1931) with the related regulation in 1933 (R.D. n. 1176 of June 15, 1933), in which were accurately listed the tasks to be assigned to each citizen (women included) during the conflict. P. Ferrazza, *La mobilitazione civile in Italia, 1940-1943*, «Italia Contemporanea», n. 214, March 1999, pp. 21-42.

<sup>9</sup> With this expression in 2007 Davide Montino defined the fascist educational system in which the war became the fulcrum of a pedagogical project which – even moving from the Idealistic tradition of the early 1900s – under Fascism assumed increasingly military tones aimed to instil in children patriotic feeling and Italian identity as well as to build a militarized society (D. Montino, *Libro, quaderno e moschetto. Pedagogia della guerra nelle letture e nelle scritture scolastiche durante il regime fascista*, «History of Education & Children's Literature», vol. 2, n. 2, 2007, pp. 193-216).

contradictory, and often influenced by the social, political and economic contingencies – were, however, always conducive to the national interest<sup>10</sup>.

Since the Twenties the fascist policy was meant to achieve an economic self-sufficiency to be realized by incentivising the consumption of national goods and by promoting internal production, especially of food: a policy which had its mainstays in the «Battle for Grain» (1925) and the fight against waste. In a nation weakened by the effects of the previous Great War and the 1929 crisis, later by military expenses for the colonial wars, and finally by the embargo imposed in 1935 by the League of Nations after the Ethiopian campaign, the regime had progressively shifted to a rigid autarkic economy, which would severely impact on Italian lifestyle and nutrition.

As such, it became clear to the fascist leadership that women – of all ages, backgrounds and social class – would be the real protagonists of this economic policy. Who, if not women, would have exerted strategic choices in everyday shopping, in the consumption of Italian products, preparation of frugal meals, the wise management of the family budget and the recycling of raw material, clothes and leftover food? To ensure that women would be provided with the necessary “weapons” to fight on the home front of autarkic cooking, the fascist government put in place a complex machine for the female consensus, which acted simultaneously on multiple sides: the first was that of school education, but no less important was the informal education imparted through books and magazines for women, or training initiatives carried out by the fascist women’s associations, supported by the production of manuals and booklets of instructions purposefully arranged by the Fascist Party itself.

Though many war cookbooks already existed, dating back to the Great War<sup>11</sup>, the regime deemed it necessary for women to be provided with texts

<sup>10</sup> This ambiguous attitude of the party towards women is illustrated by two examples. If it is true that the regime put into practice a discriminatory policy on women’s access to work (which contrasted with the exploitation of the female workforce, underpaid and therefore more convenient for employers), when necessary it did not hesitate to ask women to replace in the workplace the men who left for the front (cfr. M. Saracinelli, N. Torri, *L’Almanacco della Donna Italiana: dai Movimenti Femminili ai Fasci (1920-1943)*, in M. Addis Saba (ed.), *La corporazione delle donne. Ricerche e studi sui modelli femminili nel Ventennio*, Firenze, Vallecchi, 1988, pp. 73-126). Also the position of the regime regarding physical and sports education of women was always poised between an attitude of trust in sport (as preparation for the primary purpose of procreation), and distrust towards what could be a possible “distraction” from family duties (cfr. G. Gori, *Italian fascism and the female body. Sport, submissive women and strong mothers*, London, Routledge, 2004).

<sup>11</sup> Such as Giulia Peyretti’s *Cucina di guerra. Cento ricette di cucina igienica senza carne* [War cooking: one hundred recipes of hygienic food without meat], published in 1916 by the Turin magazine «La Donna» [The Woman]; the booklet *Cucina di guerra* [War Cooking] edited by the Provincial Commission for the patriotic propaganda and the food savings in Bergamo (1917); Rosa Maria Grillo, *alias* Grillo del focolare (The Hearth Cricket), *Mangiar bene e spendere poco. Ricette economiche per il tempo di guerra* [Eating well and spending little. Economic recipes for wartime] published in 1917; *Alimentazione economica* (Economic Eating) by Elvezia Tramontani Rossi (1919); and *L’orto di guerra* [The War Garden] by Nicola Ferrari (1917).

responding to contingencies and, above all, imbued with fascist propaganda. Hence the flourishing of new books with significant titles, such as: *Vivere bene in tempi difficili: come le donne affrontano le crisi economiche* (Living well in hard times: how women face economic crisis), by Fernanda Momigliano (1933); *La cucina italiana in tempo di sanzioni* (Italian cooking during sanctions), by Ada Bonfiglio Krassich (1936); *La cucina durante le sanzioni* (Sanctions cooking) by Battista Bassanelli, Mario Donati and Vincenzo Baggioli [1936] etc.<sup>12</sup>

A significant example is represented by the 1936 book *La cucina italiana della resistenza* (Italian resistance cooking) by Emilia Zamara. After welcoming her (female) readers with a propagandistic slogan («Let's defend ourselves against the iniquitous economic siege!»), Zamara presents her recipes: «soups, regional dishes, fish, legumes and cakes» together with «dishes that replace meat, made of vegetables and eggs» etc., and all rigorously based on Italian products. Among them, rice stands out, which was so abundantly produced in Italy that the Government tried to promote its consumption instead of *pastasciutta* (since Italian grain was not yet sufficient for the production of the latter). Thus a real “battle for rice” was fought through medical articles, pamphlets and dedicated cookbooks published by the National Institution for Rice (purposefully founded in 1931)<sup>13</sup>. In parallel, a sort of “battle against pasta” was engaged, even supported by intellectuals such as Filippo Tommaso Marinetti who, in his *Manifesto of futurist cooking* – published between 1930 and 1931 in several magazines – exalted the abolition of pasta, which would «free Italy from expensive foreign grain and promote the Italian industry of rice»<sup>14</sup>.

On the autarkic table a new food appeared: Italian fish, of which «the housewife, who does not know it well, must acquire extensive knowledge» (as clarified by the aforementioned Emilia Zamara, p. 83). In fact it was Fascism – in response to sanctions – which encouraged the consumption of fish. Until then it had hardly been used and actually constituted a valuable and very cheap food, defined by Mussolini a «gift that God granted to us when He surrounded

<sup>12</sup> For these and other sources cfr. the final bibliography to this article, and the bibliographic review by M.P. Moroni Salvatori, *Ragguaglio bibliografico sui ricettari del primo 900*, in *Storia d'Italia. Annali 13: L'alimentazione*, ed. by A. Capatti, A. De Bernardi and A. Varni, Torino, Einaudi, 1988, pp. 889-925.

<sup>13</sup> Such as the 1929 work by Giuseppe Galleani *Come si cucina il riso? Tutti i modi di accomodarlo, dagli antipasti ai dolci, ad uso della cucina casalinga e professionale* (How do you cook rice? All the ways to prepare it, from appetizers to desserts, for home and professional cooks); followed by the booklets published by the National Institute for Rice in 1934: *Mangiate riso. Il riso è salute* (Eat rice, rice is healthy); in 1938: *Per voi massaie. Consumate risi* (For you Housewives: eat rice); and in 1940: *Mangiate riso. Il riso è salute – Nuovo ricettario* (Eat rice – New cookbook).

<sup>14</sup> Cfr. F.T. Marinetti, L. Colombo (*alias* Fillia), *La Cucina Futurista*, Milano, Sonzogno, 1932, p. 43. See also A. Capatti, M. Montanari, *La cucina italiana. Storia di una cultura*, Roma-Bari, Laterza, 1999, pp. 244, 346-348 and G.A. Pautasso, *Epopea della cucina futurista*, Cremona, Edizioni Galleria Daniela Rallo, 2010.

our land by sea»<sup>15</sup>. It was even possible to farm some fish (such as carp) in paddy fields, autarkically combining two productive activities in one<sup>16</sup>.

It can thus be seen that cooking became a strategic sector of the Nation's economy. In this way, recipe-books and manuals were aimed at the managers of the daily economy par excellence: the housewives. All the same, this editorial production addressed also, and above all, the "modern women" from small and medium urban bourgeoisie that the regime had to win over gradually to the cause of autarky – but without giving up appearances. In fact, «cooking is a small and a great thing at the same time [and] the talent of a housewife is especially valuable when she can prepare excellent dishes at low cost, but give the impression of having a top chef at her disposal»<sup>17</sup>. Thanks to this cooking, euphemistically defined as modern, fast and elegant, Italian women gradually learned the parsimony that would prove to be a strategic weapon, functional to the regime's war policy.

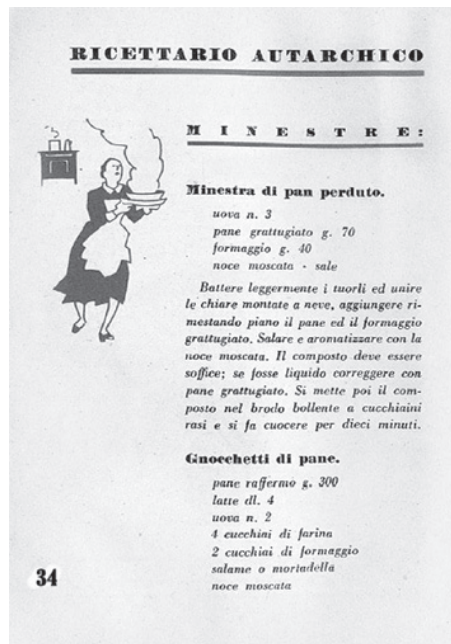
### 3. *From autarky cooking to war cooking: teaching women to «resist!»*

With the descent into war, the transition from autarky economics to war economics was, at least initially, almost imperceptible. For women, *autarkic gardens* (in towns, arranged in courtyards or on balconies) and *autarkic cooking* now became respectively «war gardens» and «war cooking». While men went to the front, with each passing month women also began fighting their no less tough daily struggle. Be it a rural countryside housewife, a modest middle-class wife, a housemaid in the service of a noblewomen in the town or a girl fresh from her studies in home economics, every Italian woman was called to strive to put on the table the little food that it was possible to obtain after the introduction (in 1940) of ration cards. To accomplish this burdensome task, Italian housekeepers could glean precious advice from an abundant series of cookbooks which were published between 1941 and 1944, such as *Ricette di Petronilla per tempi eccezionali* (Petronilla's recipes for exceptional times) of 1941, *Cucina in tempo di guerra* (Wartime cooking) by Petrali Cicognara and Zuccardi Merli (1941), *La cucina autarchica* (Autarkic cooking) by Elisabetta Randi (1942), *Cucina del tempo di guerra* (Cooking in wartime) by Lunella de Seta (1942), up to *Desinaretti per... questi tempi* (Delicacies for...current

<sup>15</sup> B. Bassanelli, M. Donati, V. Baggioli, *La cucina durante le sanzioni*, Milano, La diffusione della Stampa [1936], pp. 8-9.

<sup>16</sup> R. Tinghi, *La cava dell'oro* [s.l.], Istituto Galileo Galilei aderente all'Istituto nazionale di cultura fascista, 1940.

<sup>17</sup> Casadoro, *Piccolo consigliere della donna moderna*, Milano, Casa Ricordi, 1932, p. 4.



Pic. 1a. and Pic. 1b. Cover of: National Fascist Party, *Do not waste!* Bologna, Ufficio Stampa e Propaganda del P.N.F., 1941. On the right: the *Autarchy Cookbook*, in the same booklet (Photo by the Authors. Collection of the University of Macerata).

times) by Amalia Moretti (1944). However, we will now address the other tools that the regime put into practice to further encourage women's contribution to the war effort.

### 3.1. *War against waste!*

The hardest battle Italian women had to fight was that against waste – as stated in the propaganda posters dominating the walls, and uninterruptedly repeated by slogans from magazines and government pamphlets. «The battle against waste has its first trenches within the domestic walls!», can be read in the booklet *Non Sprecave* (Do not waste) published in 1941 by the Press and Propaganda Office of the National Fascist Party (Pic. 1a and Pic. 1b). Other similar booklets were designed to offer Italian housewives precious advice about how to save fuel and energy, to replace dietary fats, to recycle old clothing or other material or even waste («since everything can be recycled!»), and even how to clean the house, wash, iron and preserve materials using natural and economic methods that would make clothes and fabric last longer.



In addition to these tips, in the same booklet a large section appears which is naturally dedicated to food preservation, recycling of leftovers and preparation of nutritious dishes: the attached *Autarkic cookbook* includes a cake (of bread) and coffee (made with grape-seeds). This booklet is part of a series published by the Fascist Party and aimed to promote saving as well as to strengthen the spirit of sacrifice and raise the morale of the people, especially of women – as demonstrated by titles published in the years 1941: *Guerra allo spreco* (War against waste); *Burro o cannoni? Perché i grassi scarseggiano in tempo di guerra* (Butter or cannons? Why oils and fats are scarce in wartime); *Sapersi nutrire* (Knowing how to nourish); *Alimentazione razionale* (Rational eating), and above all *La donna italiana e la guerra* (The Italian woman and the war).

### 3.2. *From the family garden to the war garden*

Since the Twenties the Fascist Party had promoted, through its leisure association OND (Opera Nazionale del Dopolavoro), the amateur practice of horticulture with the aim of spreading rural customs among citizens. Exemplary is the publishing of manuals such as, in 1928, the OND, *Orti-giardino domestici: iniziative e realizzazioni del Dopolavoro* (Domestic vegetable gardens: initiatives and achievements of the OND) and, in 1929, the *Il libro del dopolavoro* (The book of after-work) by Giovanni Bertinetti. After the war broke out, the production of home-grown edible vegetables became a necessity and, between 1941 and 1943, the publishing of propagandistic handbooks, often edited by the Party itself<sup>18</sup>, flourished. Especially in urban areas, Italian men and women were encouraged to cultivate every private or public garden, flowerbed or fallow field – both collectively (with the support of the many fascist associations of Dopolavoro, Sezioni Massaie Rurali, Fasci etc.) and individually. As Cesare Alimenti<sup>19</sup> wrote in 1942 in his *L'orto di famiglia* (The family garden), these manuals represent «an easy but effective guide»

for any citizen who – while wishing to take part in this crusade [i.e.: the war garden], and having a small piece of land – does not know how to use it [and] despite this complete lack of horticultural knowledge [he equally] wants to see the fruits of his little garden soon; in other words he desires to reap an appreciable contribution for the family table<sup>20</sup> now and again.

<sup>18</sup> For the complete bibliographic references, see the list of sources in the end of the article.

<sup>19</sup> A member of the Party, Cesare Alimenti collaborated in the journal «Autarchia. Rivista mensile di studi economici» (1939-1945) and edited – for the Propaganda Office of the Party – many booklets on the topics of autarky, saving and self-production.

<sup>20</sup> C. Alimenti, *L'orto di famiglia*, Bologna, La Vittoria, 1942, p. 4.



Pic. 2a. English postcard for the British campaign *Dig for Victory*. 1940s. (Courtesy Mr. Robert Opie, The Opie Collections, Museum of Brands, Packaging & Advertising, London).



Pic. 2b. Italian postcard (1940s) illustrating the verse «every morning I take care of my little garden: / the little war garden» from the patriotic song *Caro papà* (Dear Daddy\*). (Photo by the Authors. Collections of the University of Macerata).



Pic. 2c. In a 1942 textbook for primary schools, the tale *The little house in the garden* celebrates a typical Fascist bourgeois family which is the «lucky owner of good soil». As expected, the wife – happy mother of eight – «looks after the house and the vegetable garden». (Source: *Quartiere Corridoni. Letture per la seconda classe dei centri urbani*, Roma, Libreria dello Stato, stampa 1942. Collections of the University of Macerata).

\* The patriotic refrain of the song says: «I also fight, I fight my war, / with faith, honour and discipline, / I wish that my land bears fruit / so every morning I take care of my little garden: / the little war garden / and I pray that God watches over you, my Daddy». The song *Caro papà* (composed in 1939 by E. Filippini and T. Manlio, and interpreted by Jone Cacciagli) talked about the letter sent by a son to his father at the war front.

Clearly addressed to the «urban man»<sup>21</sup>, nevertheless these tips would become equally useful for the women of the urban lower and middle classes and who, once left alone in towns, had to face this issue for the first time. If rural housewives were perfectly able to independently manage a small piece of land or even a little farm, on the contrary urban women needed to be carefully guided on how to exploit any small available space such as «a small garden, a back yard, a strip of land around the building, a slope formed by a landfill, a piece of building area [...] a stony open space, a roadside area, a paved courtyard, a terrace»<sup>22</sup>. For this “crusade”, the regime adopts communication and propagandistic modalities similar to those put into practice in other countries, for example in Great Britain (Pic. 2a). The intent was to convey the reassuring image of families united and steadfast in fighting on the home front, and to achieve the objectives of saving and self-sufficiency – as witnessed by slogans and images, songs and postcards, edifying tales in school manuals and so on (Pic. 2b and Pic. 2c).

However, with the progress of the war the toughness of food restrictions caused growing discontent, especially among the lower classes who were the most affected by sacrifices. This situation led the Minculpop (Ministry of Popular Culture) to change communication strategies and to launch a mass media, radio and photographic campaign that aimed to raise public spirit and to make people feel part of the common war effort. As such, photographs and newsreels started to spread, realized by the Istituto Luce between 1941 and 1942, representing war gardens in various towns. Of course, the main recipients (and very often the protagonists) of the aforementioned images, books, readings, video and radio programmes were women, wives, mothers, daughters and even female students – such as those filmed while harvesting potatoes in the war gardens established in the University City of Rome<sup>23</sup>.

### 3.3. *Politics and trade: Italian companies at the service of the cause*

In addition to these government booklets, recipe books and journals for housewives were also specially issued by the Italian producers of autarkic food such as canned food and meat extracts. Meat extracts, in particular, were the essential ingredient for cooking the dishes symbolising saving par excellence, i.e. broth without meat and soup prepared with home-grown vegetables.

<sup>21</sup> *Ibid.*, p. 5.

<sup>22</sup> *Ibid.*, pp. 5-6.

<sup>23</sup> Cfr. «War Gardens: Potato Harvesting in the Gardens of the University in Rome. War Hen-houses», Newsreel *Giornale Luce* C0169 of August 11, 1941 (Archivio Storico Luce, <<http://www.archivioluce.com>>, (last accessed: February 12<sup>th</sup>, 2016). Regarding the photographic celebration of the regime's initiatives cfr. S. Mannucci, *Luce sulla guerra. La fotografia di guerra tra propaganda e realtà. Italia 1940-45*, Roma, Nuova Arnica Editrice, 2010.



Pic. 3a. and Pic. 3b. Colouring Book for children: *A.B. Cirio*, S. Giovanni a Teduccio, Cirio [1940]. The girl «Lady Betta» is represented as a perfect little housewife (Photos by the Authors. Collections of the University of Macerata).

These editorial products – born during the years of resistance cooking – would continue to be published during the Thirties and beyond. In 1929, in fact, the recipe book *Per mangiar bene* (To eat well), realized by the company *Brodo Maggi*, was issued; in 1932, we find the successful *Casadoro. Piccolo consigliere della signora moderna* (Casadoro: the Little advice book for modern ladies), a complimentary recipe book by the Liebig Company.

Some companies availed themselves of illustrious collaborators. For example, the *Olio Carli* Ligurian oil mill, on the occasion of the 25<sup>th</sup> anniversary of its foundation in 1936, started publishing the famous *Ricettario dell'Olio Carli* written by the Head-chef of the Italian Royal House Amedeo Pettini: the cookbook was entitled *Manuale di igiene alimentare per la preparazione di vivande sane e gustose* or Food Hygiene Manual for the preparation of healthy and tasty food (where «food hygiene» euphemistically stands for “economical cooking”).

Equally renowned were the recipe books, planners and contest books for housewives which, with the prestigious collaboration of Lidia Morelli, were realized in the late 1930s by the Southern-Italian company *Cirio*, famous for canned tomatoes and other canned goods – the only food that Italian housewives could easily store in times when there were no refrigerators and it was difficult to access traditional systems of food preservation (such as salt, oil, vinegar, alcohol or sugar).



Pic. 4a. (left) Zia Carolina, *Cucina pratica. Ricette gastronomiche ad uso delle famiglie*, Milano, Edizioni SACSE, 1936. Pic. 4b. (center) Giorgina, *Almanacco della cucina 1940*, Milano, Sonzogno, 1939. Annual supplement of the monthly «Rivista delle famiglie». Pic. 4c. (right) Cover of the monthly magazine «La cucina italiana», n. 1, January 1940. (Courtesy Gastronomic Library, Barilla Academy, Parma, Italy). (Courtesy Gastronomic Library, Barilla Academy, Parma, Italy).

The alliance between the regime and Italian companies was so strong that advertising – deeply imbued with propaganda – invaded the educational dimension of daily life, in families and in classrooms. At the beginning of the war, in fact, *Cirio* published two children's colouring books, the *Abaco di mago confettura* and the *A.B.Cirio*, in which the consumption of commercial food products was tactfully, but clearly, connected to the civic virtues of Italian women in times of austerity. Exemplary, in this regard, is the page referring to the «Lady (of the House) Betta»: a little girl, but already charged with adult responsibilities. Even though she cannot buy meat «because beef is expensive», she shows all «her talent» by preparing a tasty broth with meat extract for her little friend/brother Bobi, and thus earning the title of «perfect housewife» (Pic. 3a and Pic. 3b).

### 3.4. Mobilizing women through the periodical press: the role of generalist magazines, women's magazines and Party newspapers

As mentioned, this rich publishing of popular-propagandistic nature was not addressed to populace women – i.e. the solid rural housewives who were already well used to managing food shortages typical of the frugal rural lifestyle – but rather the women of urban lower and middle classes. This was confirmed by the

approach emerging in women's magazines, whose covers represented elegant and slender housewives, graciously working in simple but rational kitchens, or portrayed on the background of sober but refined living rooms typical of bourgeois houses (Pic. 4a and Pic. 4c).

Periodical press promptly adhered to the cause of saving and the kitchen front, and in fact this campaign did not remain a prerogative only of the magazines managed by the Party, but rather involved magazines of a cultural nature, of generalist approach and, finally, women's magazines.

Emblematic is the case of the widespread weekly newspaper of general nature «La Domenica del Corriere» which, from 1926, published two popular columns about cooking: *Tra i fornelli* (At the stove), and home economics *La massaia scrupolosa* (The scrupulous housewife), both edited by the female doctor and university professor Amalia Moretti Foggia Della Rovere, who wrote under the pseudonym of *Petronilla*. The outbreak of the war led first the publisher Olivini, and then Sonzogno, to gather *Petronilla's* recipes in books that would be very successful: *Ricette di Petronilla* (Recipes by Petronilla) in 1935; *Altre ricette di Petronilla* (Other recipes by Petronilla) in 1937; *Ricette di Petronilla per tempi eccezionali* (Petronilla's recipes for exceptional times) of 1941; *200 suggerimenti per... questi tempi* (200 suggestions for... current times) in 1943; and *Desinaretti per... questi tempi* (Delicacies for...current times) in 1944<sup>24</sup>.

But Amalia Moretti was not the only person writing in the magazines of the time: columns about cooking appeared in the prestigious weekly cultural journal «Illustrazione Italiana» (Italian illustration) as well as in the women's magazines «Èva» and «Grazia», and all systematically pursued the objective of the fascist educational campaign for food nutrition and food saving<sup>25</sup>.

As one can imagine, such topics were especially addressed by gastronomic journals, such as the monthly «La Cucina Italiana. Rivista di gastronomia per le famiglie e i buongustai» (Italian Cooking. Journal of gastronomy for families and gourmets). Founded in 1929, in the Thirties the journal took on a new editorial format and embraced the regime's objective of turning its bourgeois female readers into perfect housewives and loyal to fascist principles – as evidenced by the new, significant title (and subtitle) adopted: «Journal of gastronomy for Italian families and women: eating better... spending less». In striking contrast to the carefree nature of the scenes represented on the glossy

<sup>24</sup> Ms. Moretti Foggia also published columns about medicine – but under the more scientifically virile, and reliable – pen name of *Doctor Amal* – and about childcare, with the pen name of *A Mother* (about this figure cfr. M.G. Muzzarelli (ed.), *Le ricette di vita del dottor Amal e di Petronilla, 1929-1947*, Milano, Fondazione Corriere della Sera, 2013; L. Ceretta, *Le donne e la cucina nel Ventennio*, Sant'Ambrogio di Torino, Edizioni Susalibri, 2008; R. Dall'Ara, *Petronilla e le altre. Il mestolo dalla parte di lei*, Mantova, Edizioni Tre Lune, 1998).

<sup>25</sup> F. Tarozzi, Firenze, *Padrona di casa, buona massaia, cuoca, casalinga, consumatrice. Donne e alimentazione tra pubblico e privato*, in *Storia d'Italia. Annali*, 13: *L'alimentazione*, cit., pp. 645-679; M.G. Muzzarelli, F. Tarozzi, *Donne e cibo: una relazione nella storia*, Milano, B. Mondadori, 2003.

covers, in the columns inside could be found «war dishes», «autarkic flans», recipes of the «Red Cross nurses», contests «for the best recycling of kitchen waste in cooking», and so on<sup>26</sup>.

Obviously, this female mobilization was intensely promoted also by Party's journals such as «La donna fascista» (The fascist woman). This journal, founded in 1919 as the «Giornale della donna» (Women's journal), in 1935 became the «magazine of the female organizations of the Fascist Party». Its pages were full of home economics and «food economics» tips offered by the author *The Housewife* who told readers how to «prepare a tasty and rich lovely meal» with «substitutes and ingenious ideas», and how to realize recipes in which «condiments are so unimportant that you will not worry about the ration cards»<sup>27</sup>.

In addition to the periodical publishing, however, the systematic and pervasive work of true food and home economics literacy for women would be implemented by the regime through other crucial actions too.

#### 4. *Forming the «new fascist woman» in the service of the Nation: the role of the school*

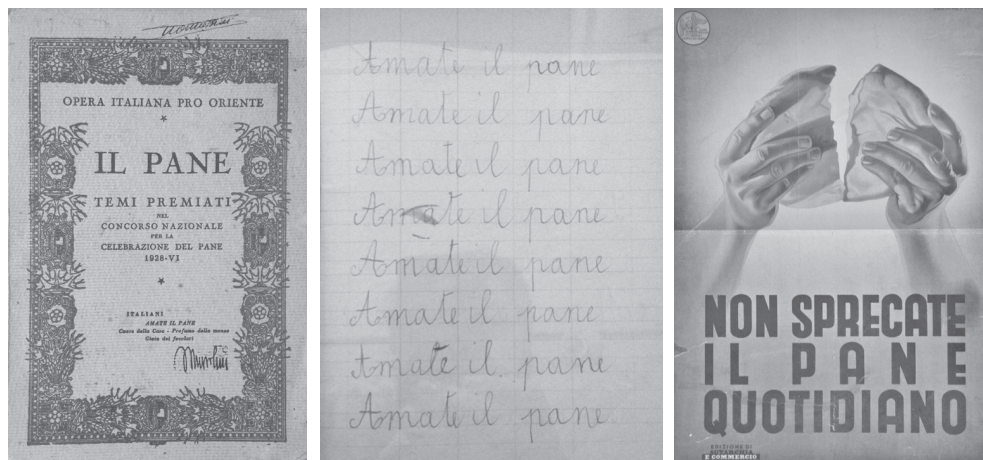
School was the most powerful channel through which the regime could promote – in times of autarkic and war economy – the value of saving and waste minimization among all children, from infancy to adolescence. Edifying readings, poems, posters and even the notebooks' covers, contributed to instil, from the earliest age, the pillars of this culture. Particularly significant was, in this regard, the consecration of bread and its crumbs, which were raised to «an almost mystic symbol of saving, frugality and rectitude»<sup>28</sup>. The campaign against bread waste began in the classrooms, where pupils found in textbooks the *Preghiera del pane* (Bread Prayer), written by Mussolini himself in 1928. This prayer became a school text to memorize (by repeating aloud, at home too), on which to practice reading and writing, and finally to use as inspiration for the composition of essays for national competitions – such as that organized by the Opera Italiana Pro Oriente, on the occasion of the Bread Days (cfr. Pic. 5a, Pic. 5b and Pic. 5c)<sup>29</sup>.

<sup>26</sup> Cfr. «La cucina italiana», vol. XX, n. 1, January 1, 1940, p. 6.

<sup>27</sup> Cited from «La donna fascista»: n. 1, October 30, 1941, p. 15; and n. 5, December 30, 1941, p. 15.

<sup>28</sup> S. Bellei, *Ricettario fascista*, Finale Emilia, Edizioni CDL, 2013, p. 39.

<sup>29</sup> Written by the *Duce* on January 10, 1928, the little poem was widespread on the occasion of the national celebration of the Bread Days of April 14-15, 1928. Here is the text: «Love bread: / heart of the house, / scent of the table, / joy of the hearth. Respect bread: / sweat of the brow, / pride of labour, / poem of sacrifice. Honour bread: / glory of lands, / fragrance of the earth, /



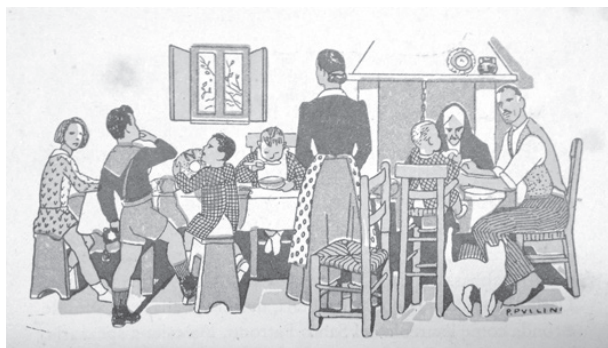
Pic. 5a. (left) *Bread. School compositions rewarded in the national competition for the celebration of bread*, Milano, Società editrice La Montanina of the Opera Italiana Pro Oriente, 1928. Pic. 5b. (center) «Love bread». Calligraphy exercise made on the first verse of the Mussolini's poem *Bread Prayer*. Exercise book, 1937. Pic. 5c. (right) Poster *Do not waste daily bread* [s.l.], Edizioni di Autarchia e Commercio [1940]. (Photos by the Authors. Collections of the University of Macerata).

However, if the “lay worship of bread” appealed to all pupils (and their families), the “pedagogy of war” had a stronger gender characterization. The new creed of the «militarized Nation» resulted in the creation of real decalogues, prayers, oaths and catechisms adapted for boys and girls: these texts – widespread in textbooks, school diaries and notebooks – pursued different goals: educating future loyal and brave soldiers, on the one hand; and, on the other, educating girls to fulfil their destiny of future mothers and housewives or nurses, child-carers, teachers etc., and finally collaborators and devoted advocates of Fascism, especially in wartime. In the *Catechismo delle Piccole Italiane* (Catechism for Young Italian Girls) of 1935, in fact, girls are expressly asked to prepare «to resist [...] in the darkest hours, in the most severe trials», and «to desire Victory through resistance: with the extinguished embers in the fireplace, the deserted house, the empty bread-bin, and through a double vigil: the abstinence from meat and the wakefulness of the soul»<sup>30</sup>.

celebration of life. Do not waste bread: / wealth of the Homeland, / the sweetest gift of God, / the holiest prize / for human labour» (B. Mussolini, *Amate il pane, cuore della casa, profumo della mensa, gioia del focolare. Rispettate il pane, sudore della fronte, orgoglio del lavoro, poema di sacrificio*, «Il Popolo d'Italia», n. 73, March 25, 1928, p. 15).

<sup>30</sup> Cfr. *La Capo-Squadra Piccola Italiana*, Roma, Presidenza Centrale dell'Opera Balilla [1934-1935]. Now in C. Galeotti (ed.), *Saluto al Duce! I catechismi del Balilla e della Piccola Italiana*, Roma, Gremese, 2001, cited from pp. 111 and 117.





Pic. 6a. In the reading *The First Bread* the domestic and moral virtues of the girl are represented as follows: «Only Ornella asks for nothing: she is glad to put her hands in the chest for the bread, remove the yeast dough, divide it, shape it into loaves and make the sign of the cross above» (A. Petrucci, *L'aratro e la spada. Letture per la terza classe dei centri rurali*, Roma, Libreria dello Stato, 1941, p. 3. Collections of the University of Macerata).



Pic. 6b. Girls of the primary school home economics class in the «Umberto di Savoia» Open-air school for delicate pupils, Municipality of Milan, 1930-1939. On the wall the motto dominates: «You also, housewife, are a soldier of the revolution». (Database DIA, Historical Archive of Indire, Florence. Creative Commons License).

In schools the creation of the new fascist woman was especially based on the teaching of the subject *Lavori donneschi* (Female handiwork).<sup>31</sup> Although this subject had been present since the nineteenth-century, the teaching of the basics of housekeeping, childrearing, cooking, sewing, dressmaking and home economics was progressively imbued with fascist values. School teaching was reinforced by school readings (Pic. 6a) and children's books exalting the domestic virtues of the young «queens of the house» (Pic. 6c). Female virtues were further inculcated through gender vignettes on the notebooks' covers (Pic. 6d, Pic. 6e, Pic. 6f), and repeatedly emphasized by Mussolini's mottoes often reproduced on the walls of home economics classrooms, such as: «You also, housewife, are a soldier of the fascist revolution» (cfr. Pic. 6b).

The education of young Italian girls continued in the following levels of schools, whose textbooks were prepared by the best specialists of the time.

<sup>31</sup> For a first review of these textbooks in primary schools and professional schools between 1923 and 1928 see A. Ascenzi, R. Sani, *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, pp. 566-567, and 659.



Pic. 6c. F. Lombarda, *Little Queen of the House*, Milano, Casa Ed. Carroccio di G. e R. Boschi, 1937 (Collections of the University of Macerata).



Fig 6d. Cover of the notebook *The Cook* (Database DIA, Historical Archive of Indire, Florence. Creative Commons License).



Pic. 6e. Cover of the notebook *The Little Housewife* [1930s]. (Collections of the University of Macerata).



Pic. 6f. Notebook with *Riddles* [1930s] about the tools of the housewife's daily work: the thimble; the cooking apron (Collections of the University of Macerata).

Elisabetta Randi was a prolific author in this field. In addition to her successful cookery textbook of 1942 *La cucina autarchica: nozioni teoriche e pratiche di autarchia alimentare* (Autarkic cooking: theory and practice of food autarky), Randi published several home economics manuals, which would be used for a long time in middle schools (from 1942 to 1960), in technical institutes for girls (from 1949 to 1960), in teacher training schools (from 1931 to 1957) and in teacher training schools for women (from 1934 to 1960)<sup>32</sup>, thereby training generations of Italian girls under Fascism and then in the post-war years.

Equally renowned was the aforementioned Lidia Morelli, author of popular books about cooking and housekeeping: *Come governare la mia casa* (How to keep my house) in 1927; *Nuovo ricettario domestico* (New household recipe book) in 1935; *Nuovi orizzonti per la vostra mensa* (New horizons for your dinner table) of 1936; *Agenda Cirio per la casa* (Cirio Planner for the house), 1939; *La vita sobria* (The frugal life), 1941; *Vita di casa: economia domestica* (Home life: home economics) of 1942. A supporter of the regime, Morelli was engaged in countersanctionist propaganda and in the fascist education of women, for whom she prepared the textbook *Massaie di domani. Conversazioni di economia domestica per le scuole secondarie di avviamento professionale a tipo industriale femminile* (Housewives of tomorrow: home economics conversations for secondary schools of vocational-industrial training of women), which was published several times (in 1933, 1935, 1937 and 1942). Again, together with Irene Faccio, in 1938 Morelli also published the textbook *Il lavoro della giovinetta italiana nelle scuole secondarie di avviamento professionale a tipo industriale femminile* (The work of the Italian girl in secondary schools of vocational-industrial training for women).

However, these are only two representatives of the many authors (predominantly female) of textbooks that were printed on these subjects during the fascist period.

In order to comprehend the kind of theoretical and practical work that was carried out during home economics courses in girls' schools of the time, we deem it important to refer to the existence of some *Albums of Schoolwork*, which can be found in the historical archives of the National Institute for educational documentation, research and innovation (Indire) in Florence and available online through the database DIA<sup>33</sup>. These albums were prepared in the years 1940-1941 by girls studying at the Royal professional school of teacher training for women in Forlì. The authors, Barbara Piacci and Giannina Cortesi, respectively prepared school-work concerning the «weekly meal plan», and «wartime desserts», in which all the recipes are equipped with

<sup>32</sup> An up-to-date list of manuals of home economics by Elisabetta Randi is available through the national collective online catalogue of Italian libraries SBN: <<http://www.sbn.it>> (last accessed: February 12<sup>th</sup>, 2016).

<sup>33</sup> Images from these Albums are available through the online database of images for teaching DIA of the Indire at the URL: <<http://www.indire.it/dia>> (last accessed: February 12<sup>th</sup>, 2016).

tables containing ingredients, quantities and, above all, the unitary and total costs of each menu/recipe: the main concern of the good housewife in wartime (Pic. 7a and Pic. 7b).

### 5. A “war pedagogy” for women: the educational role of fascist women’s associations

In order to complete the extensive implementation of this female pedagogy of war, the Fascist Party entrusted to its associations the creation of special training activities for girls and women. The complex associational structure was organized into organized into female youth organizations (*Piccole Italiane*: years 9-14; *Giovani Italiane*: 15-17; and *Giovani fasciste*: 18-2) and organization for adult women such as the *Fasci Femminili* (women aged 22 onwards), and the *Massaie Rurali* especially aimed at educating rural women to support the autarkic, ruralist and pro-natalist policies of the government<sup>34</sup>. For each age-group the regime organized an educational system throughout the territory (through the local Case del Fascio, the Case del Balilla, the venues of the G.I.L. and the Dopolavoro), which aimed to prepare the female population for «the tasks that Fascism assigns to women in the Nation’s civic life»<sup>35</sup>. As such, the *Giovani Italiane* could attend the Sunday courses in home economics and childcare managed by the Opera Nazionale Balilla<sup>36</sup>; the *Giovani Fasciste*, the courses of fascist culture, first aid, hygiene and home economics; finally, analogous courses and demonstrations were offered to adult women in local groups of *Fasci femminili* too. In this regard, the regime always paid great attention to courses, exhibitions and public competitions in cookery since – as Italian girls and women had well learned from the *fascist catechisms* – «disdaining kitchen tasks means not to care about the health of the family» and «the woman who is not able to cook, wastes, through endless meanderings, the money that was earned by her husband and sons»<sup>37</sup>.

Last but not least, also rural women could benefit from a specific education imparted through local sections of the association *Massaie Rurali* (Rural Housewives), on the topics of agriculture, horticulture, farming, rural and

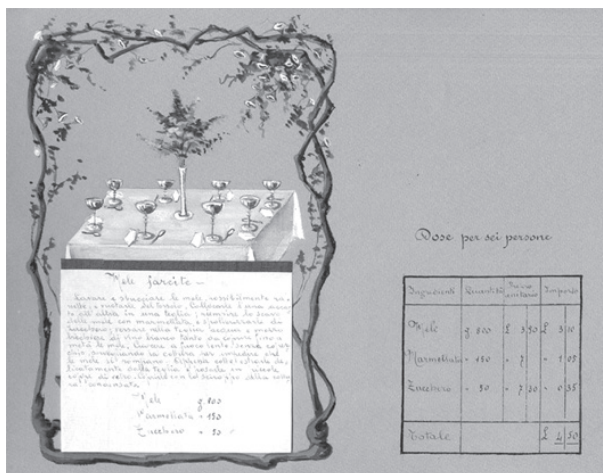
<sup>34</sup> P. Willson, *Contadine e politica nel Ventennio. La Sezione Massaie rurali dei Fasci femminili*, «Italia contemporanea», n. 218, 2000, pp. 31-47; Ead., *Peasant Women and Politics in Fascist Italy: The Massaie Rurali*, London-New York, Routledge, 2002.

<sup>35</sup> Cfr. R. Ferrari del Latte, *Donna*, in Partito Nazionale Fascista, *Dizionario di Politica*, 4 voll., Roma, Istituto della enciclopedia italiana, 1940, Vol. 1, pp. 811-817.

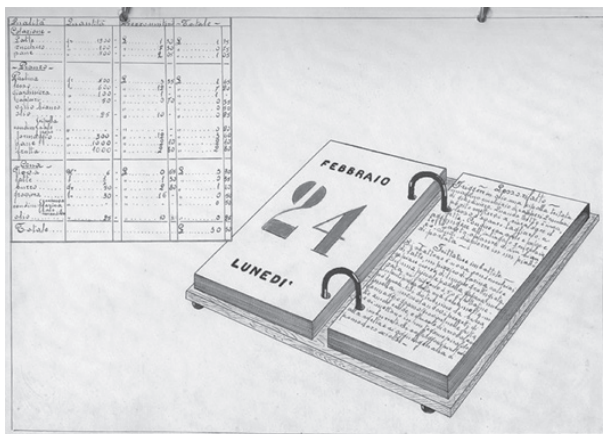
<sup>36</sup> In the magazine «La Cucina Italiana», n. 2 of February 15, 1934 the «trainee housewives» are portrayed while performing «their main duties: in the kitchen, at the wardrobe and in the nursery».

<sup>37</sup> Galeotti (ed.), *Saluto al Duce! I catechismi del Balilla e della Piccola Italiana*, cit., pp. 81-82, 90-91.

Pic. 7a. A Page from the Album of Barbara Piacci: *Wartime desserts*". Home economics course of the *Regia Scuola di Magistero Professionale per la Donna* di Forlì. School year 1940-41. (Database DIA, Historical Archive of Indire, Florence. Creative Commons License).



Pic. 7b. Page from the Album of Giannina Cortesi: *Feeding: weekly list for six*. Home economics course of the *Regia Scuola di Magistero Professionale per la Donna* di Forlì. School year 1940-41. (Database DIA, Historical Archive of Indire, Florence. Creative Commons License).



small craft industries. Due to their strategic role in food economy, rural women would be the subject of an insistent propaganda carried out through Rural Radio programmes<sup>38</sup>, dedicated magazines<sup>39</sup>, and special manuals such as those by the aforementioned Lidia Morelli: *Le massaie contro le sanzioni: 18 novembre 1935-XIV* (Rural housewives against sanctions: November 18, 1935-fourteenth year of the fascist age) 1935; *Le massaie e l'autarchia* (Rural housewives and autarky), 1937; *Per voi massaie d'Italia* (For you, Italian

<sup>38</sup> Regarding Fascist radio programming especially addressed to women through programmes about home economics, see G. Isola, *Abbassa la tua radio per favore... Storia dell'ascolto radiofonico nell'Italia fascista*, Firenze, La Nuova Italia, 1990, pp. 115-141.

<sup>39</sup> P. Willson, *Le virtù della terra. Due periodici per le contadine negli anni del fascismo*, in S. Franchini, S. Soldani (edd.), *Donne e giornalismo. Percorsi e presenze di una storia di genere*, Milano, FrancoAngeli, 2004, pp. 238-259.

housewives), 1938. The Party itself published specific booklets like *Massaie rurali in linea* (Rural housewives on the front), edited in 1942 by Anna Clivio Kestenholz, President of the *Unione nazionale delle massaie della campagna* (National union of rural housewives). In this propagandistic booklet, clearly emerge the duties and tasks that the regime expects rural housewives, and Italian women in general, to perform in the dramatic conjuncture of war:

War is a terrible reality that requires all men and women to attend scrupulously and willingly to their heavy duties. *The Housewife also has to perform important duties*, especially in the current war that is fought more with the strength of rural and civilian populations, rather than with weapons. *We must produce, produce and again produce [...] increase production and avoid waste [...]* In this way, dear Housewife, you can diligently cooperate in the achievement of Victory which [...] we must obtain not only with weapons but also and mainly with the resistance on the home front. And the home front consists of thousands and thousands of recruits and soldiers, who all have been educated by Italian women and, first of all, by You, Housewives<sup>40</sup>.

### Conclusions

Starting from the Fascist Revolution, the regime gradually implemented a complex educational and propagandistic system that aimed to form a nation of future fighters. Through the implementation of a real “gender addressed” educational-propagandistic project, on the one hand, the male population was regimented in order to fulfil its military destiny; on the other, the female population was also educated to fight, with different weapons, on the home fronts of the kitchen and the family garden which would soon become the scene of a silent but no less tough war.

The sources analysed have allowed the Authors to rebuild the multifaceted ways in which the regime put this war education for women into practice. The outlined scenario in particular highlights a well-structured system of education and training for women that we could define *lifelong* and *lifewide*, that is to say branched in numerous and differentiated formal and non-formal educational opportunities, which started in primary schools and ended with home economics courses for adult women imparted through fascist associations. These initiatives were completed and supported by an equally educational action, but of an informal nature, which was implemented through the mass media of the time, such as printed media (generalist and women’s periodicals, popular manuals, Party booklets), images (posters, postcards, photos), newsreels and radio programs. This campaign had to inculcate in the entire female population – regardless of social provenance or cultural background

<sup>40</sup> A.C. Kestenholz, *Massaie rurali in linea*, Milano, Editoriale Domus [1942?], pp. 1-2, 58.

– the same principles of autarky, savings and recycling of raw materials and food in particular.

Such massive female mobilization in support of the war effort – even though based on the fascist celebration of a traditional female model of exemplary bride and mother<sup>41</sup> – favoured however, as acknowledged by the historiography, the emerging contradiction between traditionalist trends and impulses to modernization, and therefore between differentiated and opposite female models<sup>42</sup>. In this scenario, it can be affirmed that women's enrolment on the home fronts of the kitchen and the war garden, did not constitute an action confined to private daily life but rather assumed the traits of a social and political engagement. It represented an expression of the fascist female model that the historian Marina Addis Saba defined the «*donna muliebre*» (*feminine woman*)<sup>43</sup>, i.e. a woman who had the task to perform her traditional role of mother and housewife within a wider dimension characterized by a clear social and political value, and conceived as a national mission for the benefit of the Homeland. A female model that ambiguously combined the modernity of the new century with nineteenth-century traditions, which would begin breaking down right after the war and paradoxically as a result of the new self-consciousness gained by women during the Second World War.

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# L'importanza di chiamarsi *letteratura*. La letteratura per l'infanzia e le tesi di Christopher Booker sull'origine e la funzione delle storie

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*The importance of being literature. The children's literature and the ideas of Christopher Booker on the origin and function of the stories*

ABSTRACT: Recently, in different fields of research (psychological, evolutionary, cognitive) many studies have appeared inquiring the how and why human beings have always been telling stories. These researches produce hypothesis that provide precious hints as to what the ultimate aim, meaning and nature of storytelling – and thus of literature – can be. Applied to the study of children's literature, these trends of research can open new and interesting perspectives and hermeneutic directions, contributing to the definition of criteria according to which it can be possible to recognize which books, among all children's books, possess the necessary characteristics to be called a 'literature'. In this article the thesis of Christopher Booker on the origin and the deepest function of stories are analyzed – together with those of other scholars – and are used to try and see if, according to them, it is possible to detect the kind of books that can be considered more truly artistic, literary, somehow 'universal', also among children's books.

EET/TEE KEYWORDS: Christopher Booker; Children's Literature; Art; Storytelling; Origin of Species; Archetypes.

## *Letteratura per l'infanzia*

Quando ci si occupa, sia come studiosi che come educatori, di letteratura per l'infanzia, la domanda relativa a quali libri possano essere considerati davvero «letteratura» si presenta inevitabile. Si tratta di una domanda che impegna in

primo luogo proprio chi studia la letteratura per l'infanzia, dal momento che questa letteratura, più di qualunque altra, si incrocia da sempre con urgenze, intenzioni, motivazioni e ideali, da parte degli adulti che la producono, la editano e la propongono ai più giovani, che a volte poco hanno a che fare con gli aspetti più propriamente «letterari» o «artistici» dei testi o degli iconotesti, quando si tratta di libri illustrati. Aspetti che, per fortuna, invece esistono anche nei libri per bambini e sui quali sarebbe interessante confrontarsi e ragionare insieme, come comunità scientifica. Che cosa fa di un libro per bambini o per ragazzi un'opera autenticamente letteraria, in senso lato poetica, anziché per esempio qualcosa di strumentale, di utilizzabile in un senso molto specifico, oppure di puramente commerciale? Sospesa come si trova tra arte, mercato e educazione la letteratura per l'infanzia chiama gli studiosi ad un confronto, in quello che dovrebbe essere un dibattito capace eventualmente anche di uscire dal ristretto ambito accademico per raggiungere i tanti che, a vario titolo, sono interessati o si dicono appassionati ai libri per bambini e tendono a giudicare gli stessi, negli spazi pubblici in cui si esprimono (riviste di divulgazione del settore, blog, pagine della stampa nazionale) in un modo generalmente e superficialmente univoco: i libri per bambini, quasi per un assunto aprioristico, sono sempre validi, risultano sempre «carini», nel discorso non scientifico, giornalistico, o in quella che è l'opinione generale. I libri per bambini sembrano non essere mai «criticabili», sottoponibili a «critica», o meglio questa è la prassi e l'implicita regola, legata al fatto che di altro non si tratta, in fondo, che di prodotti «per bambini». Il «carino» – da Fernand Léger provocatoriamente considerato come il nemico del «Bello»<sup>1</sup> – è una finta categoria estetica che è più che altro fastidiosa perché rivela prima di tutto una stereotipata idea di infanzia e poi la fatica, propria di tanti, a considerare la letteratura per l'infanzia a tutti gli effetti come *una letteratura*, con tutto ciò che, di una letteratura, ci sarebbe di assai più complesso da dire, da analizzare, da scoprire.

### *Letteratura e origine della specie*

Poniamoci dunque la domanda di fondo, che non può non darsi, insieme ad altre considerazioni, anche per gli studiosi di libri per bambini: che cos'è la letteratura? Come la si riconosce, quali sono gli elementi o i criteri in base ai quali poter dire, di un'opera di narrativa anche apparentemente semplice o semplicissima, che appartiene alla grande tradizione letteraria o in senso lato artistica messa a punto dall'umanità, anziché per esempio all'ambito del passatempo, del superficiale e neutro intrattenimento oppure, nel nostro caso, a quello troppo esplicitamente pedagogico, didattico, indottrinante, ideologico? Cosa si chiede

<sup>1</sup> F. Léger, *Funzioni della pittura*, Milano, Abscondita, 2005.

alla letteratura, cosa si cerca nelle sue pagine, cosa ci si aspetta che lasci, e che lasci anche ai bambini e ai ragazzi, una volta chiuso il libro? Chiedersi questo, e provare a rispondervi, significa trovarsi a ragionare su un patrimonio culturale inestimabile, lasciatoci dalle generazioni che ci hanno preceduto, e su come e se, nel nostro tempo, questo patrimonio venga accolto, trasmesso, riconosciuto, eventualmente e in che modo rinnovato, oppure venga dimenticato, tralasciato, misconosciuto, sostituito con qualcosa d'altro.

Per provare a ragionare di letteratura e di come coglierne la specificità eventuale, mi rifarò, in questo scritto, agli studi pluridecennali del britannico Christopher Booker, sfociati nel poderoso volume *The Seven Basic Plots. Why we tell stories*<sup>2</sup>. In questo libro, a sua volta, Booker attinge a studi di psicologia, di antropologia, di archeologia, di filosofia, per sottolineare come l'impulso a raccontare storie sia insito nell'essere umano dall'inizio dei tempi, o più precisamente da quando, differenziandosi da altre specie a lui vicine e dagli animali in generale, ha iniziato a percepirsi come «uomo». Questo impulso, che per la nostra specie è universale, sarebbe anzi stato programmato e codificato nel nostro cervello dal processo evolutivo proprio a seguito dello strappo avvenuto, con quel passaggio a *Homo sapiens*, rispetto allo stato di natura in cui, per un tempo incalcolabile e ancora confusi con le altre forme di vita, avevamo precedentemente vissuto. L'acquisizione, lenta ma progressiva, nell'essere umano, di una coscienza di sé, e di sé come «altro» e come «a parte» rispetto al resto dell'esistente, acquisizione che ha contribuito allo sviluppo in lui di capacità e mezzi per dominare l'ambiente, che ha determinato un avanzamento materiale e tecnologico inaudito e che ha favorito la comparsa di un suo senso di superiorità rispetto a una natura a cui non si sentiva più intimamente legato, sembra avere esasperato e fatto resistere, a livello inconscio, il ricordo di quell'originaria appartenenza a un tutto che si era andato a livello conscio affievolendo, e avere sviluppato, accanto al pensiero più strettamente razionale, il desiderio e la capacità di trovare modi – poetici, immaginifici, simbolici – per rievocare, al di là del linguaggio pratico e quotidiano, quell'ancestrale radicamento al flusso della vita intesa come dimensione assai più ampia e onnicomprensiva di ciò che è strettamente umano o del tipo di realtà che l'uomo si è a propria misura costruito.

L'impulso istintivo a raccontare storie (e a raccontarle in un modo che in parte trascende la volontà, la coscienza e la conoscenza di chi narra) sarebbe dunque uno dei modi, forse il più potente, codificati in noi per esprimere, e così non perdere, il contatto con le nostre origini, con la nostra provenienza, con l'universo di forme e vita di cui non siamo, come umani, che una parte. Le storie ci riconnetterebbero con qualcosa che va al di là di noi e ci giungerebbero dal livello più profondo, antico e incontrollabile del nostro essere, un livello che per qualcuno è accessibile e finisce per coincidere con l'io narrante. Non solo:

<sup>2</sup> C. Booker, *The Seven Basic Plots. Why We Tell Stories*, London, Continuum, 2004.

le storie sarebbero talmente «altre» rispetto alla sfera della nostra coscienza lucida (o logica) che si andrebbero a costituire quasi da sole, spontaneamente, e lo farebbero seguendo proprie regole e ricorrendo a motivi e immagini in qualche modo costanti, universali, tali da poter dire, secondo Booker, che in fondo, pur con tutte le varianti di superficie, non esistono che poche trame fondamentali a cui, anche senza volerlo o saperlo, narrando si torna sempre. Le sette trame capitali, come le definisce Booker, a loro volta non sarebbero che varianti, tra loro solo apparentemente molto diverse (si va dalla tragedia alla commedia al viaggio alla *quest* alla lotta contro il mostro alle storie di rinascita a quelle di ascesa sociale) di un racconto in qualche modo unico e sottostante, portatore di un messaggio fondamentale che la nostra parte più profonda non smette di volerci comunicare, ripetere, ricordare. Il messaggio è che solo «auto trascendendoci» potremo dirci compiutamente umani, che solo non essendo concentrati interamente in noi stessi, in quel modo egocentrico che ci aliena dal resto, potremo insieme realizzarci come individui e ritrovare l'armonia col cosmo che abbiamo conosciuto e poi perduto. La questione di fondo del narrare – si è sforzato di sottolinearlo sempre anche Giorgio Manganelli<sup>3</sup> o, in un saggio illuminante, Natalia Ginzburg<sup>4</sup> – non è insomma etica, ma ontologica: non ha a che fare con l'insegnare una morale o qualche regola sociale, ma con la possibilità di rievocare (attraverso immagini, metafore, finzioni) la nostra natura più vera e più profonda, una natura che è tanto più «umana» e fedele a se stessa quanto più è contaminata con l'universo, quanto meno è «antropocentrata» o perfino, talvolta, socialmente adeguata. Si pensi a Pinocchio, nella lettura che ne dà appunto Manganelli, secondo il quale è finché – e proprio perché – è per metà vegetale (cioè ancestrale) che il protagonista è una figura di levatura mitica e dal valore universale (ancorché considerata regressiva e riprovevole in termini familiari, scolastici e civili). In quest'ottica – illuminante e capace di spingere l'interpretazione in inedite direzioni – non è diverso da Pinocchio un personaggio non letterario ma storico – o meglio storico e letterario, dato che è entrato nella leggenda e fa parte del nostro immaginario – come San Francesco. Francesco, nella narrazione che ne è stata tramandata, è un giovane patologico, deviante, dal punto di vista del ricco padre mercante e di qualunque benpensante, quando si spoglia di tutto e rifiuta l'eredità della famiglia biologica per ritrovare una famiglia più ampia, cosmica, nella quale poter chiamare fratelli il sole, la luna, il lupo, gli uccelli, il fuoco, la morte, in un canto che segna per noi l'inizio nientemeno che della *letteratura* italiana. Forse non solo, se seguiamo le tesi di Booker, per il fatto di essere stato scritto in volgare, come si è soliti ritenere. Francesco, come Pinocchio, non possiede nessuna delle «piccole virtù» promosse dall'educazione di cui parla Natalia Ginzburg (il rispetto per il padre,

<sup>3</sup> G. Manganelli, *La letteratura come menzogna*, Milano, Adelphi, 1985; Id., *Il rumore sottile della prosa*, Milano, Adelphi, 1994; Id., *Pinocchio, un libro parallelo*, Milano, Adelphi, 2004.

<sup>4</sup> N. Ginzburg, *Le piccole virtù*, Torino, Einaudi, 1962.

il risparmio, la prudenza, il buon senso), ma incarna e dà voce alle virtù «grandi» di cui si occupa – si dovrebbe sempre occupare? – la letteratura. In primo luogo la fedeltà a un più profondo richiamo e destino rispetto a quello previsto o predeterminato dal contesto sociale. Alla luce di queste considerazioni, quanti personaggi dei libri per bambini si possono «rivedere»? Da Peter Pan che rifiuta una casa e una mamma e torna, non senza sacrificio, al mondo da cui gli umani sono giunti, il mondo degli uccelli, a Mowgli che letteralmente incarna l'idea di una fratellanza e interdipendenza originarie con l'intero mondo animale e vegetale (i lupi come genitori, la giungla come maestra), ai pirati malesi di Salgari che si sentono tigri o tigrotti e preferiscono, avventurosamente, il mare e i suoi flutti (nonché i suoi destini fluttuanti, compreso quello sempre aleggiante della morte) rispetto alle false sicurezze degli uomini civili. Gli uomini civili sono quelli che il filosofo Jankelevitch, contrapponendoli agli avventurieri e agli individui particolarmente malinconici e inquieti, chiama «uomini seri»<sup>5</sup>. La letteratura per l'infanzia – pullulante di personaggi inquieti, malinconici e avventurosi, insofferenti a un'esistenza «normale» e sensibili a un diverso, più atavico, «richiamo»<sup>6</sup> non manca di mostrare anche «uomini seri» – progettuali, rispettabili, concentrati sugli affari, i valori, le esigenze sociali. Ma quasi mai, e sicuramente non all'interno dei suoi capolavori<sup>7</sup>, essi sono rappresentati come figure ideali.

Secondo Booker le storie, così come le antiche pitture rupestri, le grandi costruzioni neolitiche e, in seguito, le altre forme d'arte (le cattedrali, la pittura, la musica), per non dire delle religioni, nascono come risposta al bisogno profondamente umano di ri-sentirsi parte di qualcosa che va al di là di noi, prendono forma per ricordarci che, oltre l'esistenza quotidiana e prosaica, apparteniamo ad una dimensione che non si esaurisce con la fine della nostra vita individuale, che il nostro senso e valore sono legati non a ciò che otteniamo qui, ma al nostro saper essere intimamente in sintonia col flusso di vita che ci precede, ci segue e ci contiene, al nostro saper spostare il centro di gravità della nostra umanità dal nostro ego al nostro Sé più profondo, un Sé capace di ragione, di ordine, di controllo, ma che non rinuncia con ciò al sentimento, all'intuizione profonda, alla visione «ulteriore»: che possiede l'equilibrio e la saggezza propri, cioè, di quella che dovrebbe essere, in termini umani, la maturità. Secondo Booker le storie narrate dall'umanità non fanno che ruotare intorno a questo: al difficile percorso (che può riuscire o fallire) di crescita e intima trasformazione di un individuo il quale, messo alla prova, deve dimostrare di essere un degno «eroe», cioè, quasi etimologicamente, in qualche modo un degno «erede» della migliore umanità, colui che può mostrare (o meno) la via dell'autenticità, che

<sup>5</sup> V. Jankelevitch, *L'avventura, la noia, la serietà* (1963), Genova, Marietti, 1991 (Opera originale pubblicata nel 1963).

<sup>6</sup> J. London, *Call of the Wild* (Trad. Italiana: *Il richiamo della foresta*), London, Macmillan, 1903.

<sup>7</sup> A. Lurie, *Non ditelo ai grandi*, Milano, Mondadori, 1993 (Opera originale pubblicata nel 1989).

coincide non con l'ottenimento del successo e dell'approvazione sociale, ma con la capacità di eludere l'esagerato egocentrismo, la concentrazione ottusa sulle cose del qui, l'alienazione rispetto alla parte più profonda di noi. Perché questa alienazione porterebbe – porterà? – niente meno che all'estinzione della specie. È infatti verso l'estinzione, secondo le suggestioni evoluzionistiche di Booker, che va l'uomo che perde il contatto con la natura, la propria e quella esteriore, sottoposta a progressiva distruzione nel momento in cui non viene sentita più come origine, come sorgente vitale, anche di sé. Sono temi che si ritrovano, del resto, anche nell'imprescindibile studio sulla figura dell'eroe del grande studioso di miti Joseph Campbell<sup>8</sup>. L'eroe, con i suoi mille volti possibili, non è mai un campione del Qui: al contrario, per tutte le culture, è colui che osa mettere un piede Fuori da ciò che è generalmente approvato, abituale e noto, per andare a recuperare qualcosa – di vitale – che è andato perduto ma è necessario perché l'uomo possa dirsi completo e perché l'umanità possa non finire.

Le storie anche dei più grandi tra i narratori esistiti, secondo questa visione, non sarebbero propriamente le *loro* storie. La loro abilità di narratori risiederebbe nella forza e pregnanza con cui sono riusciti a trovare vesti nuove attraverso le quali presentare temi che erano già latenti, non solo nelle loro menti, ma anche in quelle del pubblico ascoltatore o lettore. Le storie sono radicate, secondo Booker, in quel livello dell'inconscio che è comune a tutta l'umanità, e questa idea, lungi dallo sminuire i grandi nomi della storia della letteratura, riconosce loro la capacità eccezionale di essere in qualche modo persone più direttamente a contatto con la sfera profonda dell'umano, con quella voce che, trascendendo le coscienze individuali, parlando per l'umano così come per il non umano, rievocando un originario senso di unità di tutto l'esistente, giunge da più lontano.

### *Forma e contenuto, struttura e vitalità*

Le storie in se stesse, per come sono costruite (con un inizio, uno sviluppo, una fine), esprimono anche un'altra urgenza: quella di «sentire» che c'è qualcosa che va oltre l'apparente disordine dell'esistenza, che c'è qualcosa al di là della sua casualità e frantumazione. Il loro scopo sottostante, così come quello di tutta l'arte, è quello di creare strutture di immagini che veicolino il senso della vita, con tutta la «vitalità» che le è propria, in qualche modo però racchiudendola, contenendola, e rendendola comprensibile e sensata entro e grazie a una cornice d'ordine (e qui entra in gioco la questione della forma, dello stile, della composizione, della lingua, tanto più «artistica», e dunque letteraria, quanto più è consapevole, pensata, levigata, sottratta ai suoi usi quotidiani e ai suoi fini pra-

<sup>8</sup> J. Campbell, *L'eroe dai mille volti*, Torino, Lindau, 2016 (Opera originale pubblicata nel 2008).



tici a favore di una dimensione altra, qual è quella estetica). Dalla musica alla pittura, dall'architettura alla poesia, da un gioiello finemente lavorato allo slancio disciplinato della danza, qualunque opera d'arte che sia efficace combina questi due elementi: da un lato l'immagine del movimento, dell'esuberanza, del dinamismo, del colore, del corpo che associamo all'energia della vita; dall'altro il senso di struttura, di ritmo, di armonia entro cui il primo elemento è contenuto. Il tentativo di ogni creazione artistica è di tessere insieme questi elementi essenziali in modo da darci un senso come di perfetta risoluzione. Così facendo ci eleva, evocando qualcosa oltre noi stessi, il senso di una perfetta totalità. L'arte, quando è tale, armonizza la nostra coscienza con il Sé che ci trascende. E non solo in letteratura si ricorre ad immagini che di questo Sé siano simboli o metafore immediatamente evocative (un'immensa montagna da scalare, il fiume che inesorabile scorre, un vecchio che dispensa saggezza, un'ombrosa quercia secolare, una grande e solitaria balena bianca...immagini di una natura che è tutt'uno con se stessa), ma le storie stesse sono concretizzazioni del Sé, modi in cui il Sé si esprime, tentando di riconnetterci con la parte di noi che non coincide soltanto con noi ma ci fa essere tutt'uno col mondo. Qualunque forma d'arte, e tanto più la letteratura, può essere analizzata, dunque, sulla base della misura in cui riesce, o meno, ad esprimere il Sé, cioè ad evocare in noi questo senso di unità, appartenenza, connessione, totalità, equilibrio cosmico. Se una qualunque creazione artistica ci sembra in qualche modo non riuscita, è perché essa manca di vita, pur essendo magari finemente strutturata (nel campo degli albi illustrati si pensi ai tanti esempi di libri eleganti, ma puramente e sterilmente decorativi), oppure perché è inadeguatamente organizzata (nei libri anche per bambini, quelli con storie potenzialmente incisive, raccontate o illustrate però in modo sciatto o non curato), o entrambe le cose. Per contro, qualunque opera d'arte riuscita ha il potere di farci sentire misteriosamente più vivi, connettendoci col senso di una perfezione che va oltre le limitazioni del nostro ego. È questo il nucleo dell'impulso artistico nell'essere umano, evidente già nelle prime pitture rupestri o grandi strutture neolitiche. Ciò che avevano in comune quelle prime forme d'arte era il fatto di essere concepite per donare a coloro che le creavano un senso di connessione con qualcosa di infinitamente più grande di loro, era il tentativo di armonizzare, di allineare le vite degli uomini sulla terra con i movimenti e i ritmi dei corpi celesti o più in generale col non umano. Quello che i nostri antenati tentavano di fare era riconnettersi con quel senso di unità da cui erano stati esiliati dall'emergere di un nuovo tipo di coscienza: quella razionale, propria solo di noi «sapiens». Ma in nessun caso, secondo Booker, questo impulso a ritrovare un'unità, una che conciliasse la nostra vita interiore con quella dell'universo, si è espresso così efficacemente come nel modo in cui è stata codificata in noi, dalla stessa evoluzione, la capacità di mettere insieme le sequenze di immagini, i motivi, gli eventi non accaduti a cui diamo il nome di storie. È una teoria più o meno condivisibile, e sicuramente incompleta nel suo privilegiare di gran lunga il contenuto come elemento in base al quale

riconoscere ciò che può dirsi autenticamente *letteratura* rispetto per esempio allo stile, evocato e alluso come essenziale ma mai realmente o nel dettaglio analizzato da questo studioso. Però si può sicuramente dire che le riflessioni da lui elaborate in trent'anni di studi, letture e confronti di una quantità impressionante di racconti, fiabe, romanzi, miti, opere teatrali del patrimonio non solo occidentale forniscano preziosi spunti su cui ragionare – spunti da verificare, da mettere eventualmente in discussione o da utilizzare come chiave per analizzare anche le opere più recenti, e nel nostro caso in particolare quelle per bambini e ragazzi. Quello di Booker, cioè, anche nella (e per la) sua radicalità, è uno degli approcci più stimolanti, ricchi, propulsivi, provocatori per riflettere sul senso ultimo della letteratura e, affiancato ad altri riferimenti più specificamente dedicati alle questioni dello stile e del linguaggio (quando, come e perché esso può dirsi poetico, artistico, letterario, intendendo con stile e con linguaggio anche quello visivo, proprio delle illustrazioni, della composizione della pagina, della scelta dei colori, se si tratta di albi illustrati), può diventare uno strumento utilissimo in mano agli studiosi e agli educatori che si occupano di letteratura, anche per l'infanzia e l'adolescenza, o forse soprattutto, dato che il passaggio dall'immaturità alla maturità del protagonista (che può darsi oppure no, ed è in base a questo che egli distingue le diverse e più tipiche «trame») è per lui il nodo centrale di ogni narrazione.

### *L'eroe delle storie*

Le storie sono dirette, secondo Booker, a quello che è il problema centrale della psiche umana. Si rivolgono a ciascuno in qualità di singolo individuo e in particolare a quel livello interiore in cui tutti gli essere umani possono essere riconosciuti in termini completamente egualitari. A questo livello l'unica domanda che conta, che uno sia il sovrano di un regno oppure un semplice contadino o pescatore, è che tipo di persona si è, e in che modo ci si rapporta, intimamente, alla sfida rappresentata da cosa significa essere umani. Si è centrati sull'ego o sul Sé? Si è senza cuore, vanitosi, avidi, crudeli, orgogliosi, malintenzionati, vendicativi, intolleranti, ottusi, irresponsabili e in ultima istanza immaturi? O si è centrati su quel livello più profondo della personalità che trascende l'io e che, perciò, rende forti, altruisti, capaci di amare, generosi, modesti, compassionevoli, leali, comprensivi, autodisciplinati, tolleranti, pronti al sacrificio, responsabili e in ultima istanza maturi? L'essenza del messaggio delle storie è che, per ognuno di noi, questa è l'unica prova che conta, che il vero regno da conquistare è quello interiore della psiche e che i più grandi ostacoli a riconoscere questo sono le tentazioni dell'egotismo che inevitabilmente giungono con le ricchezze, il potere mondano, la posizione sociale o qualunque altra trappola costituita dalla nostra maschera esteriore. Solo vincendo queste tentazioni può

darsi la restaurazione di quello stato di unità e di riconciliazione tra la coscienza individuale e l'inconscio (cioè tra l'ego fin troppo umano o ipersociale e il senso di appartenenza alla natura e alla vita in generale). Se questa condizione non si realizza, il protagonista della storia fallisce e va incontro fatalmente a una tragica fine la quale, raccontata come inevitabile, è comunque un altro modo per ribadire il messaggio di fondo: che non siamo e non coincidiamo solo con il nostro io cosciente, che non apparteniamo solo al mondo strettamente sociale in cui abbiamo un nome, un cognome e un ruolo specifico, o lo rivendichiamo, ma che siamo, più a fondo, e in modo più trascendente, «fibra dell'universo», secondo la felice espressione di Giuseppe Ungaretti<sup>9</sup>. Quanti spunti interessanti, insieme ovviamente ad altri possibili, si possono ricavare da queste riflessioni e utilizzare per analizzare i libri per bambini in un modo che eviti di considerarli o semplicemente carini o come meri strumenti per raggiungere specifici fini?

### *L'autore ingombrante*

Booker va anche oltre nel suo monumentale studio e sottolinea come ci sia un altro aspetto interessante delle storie che riguarda non il protagonista, bensì l'autore: se è lui ad essere troppo egocentrato, troppo presente a se stesso, troppo cosciente, anziché più semplicemente qualcuno che presta la propria voce perché attraverso quella si esprima la parte più profonda, inconscia e collettiva dell'umanità, allora la storia finirà per non puntare più alla totalità, sarà una storia raccontata dal punto di vista – limitato – dell'ego e sarà una storia che molto verosimilmente non troverà risoluzione (o una risoluzione adeguata, «tonda», catartica dal punto di vista dello stato d'animo con cui lascia il lettore o lo spettatore). Questo, in effetti, è ciò che si è verificato, da un certo momento in poi nella storia della letteratura, in particolare occidentale, secondo le riflessioni anche di George Steiner, Tzvetan Todorov, e altri. Quello che sarebbe accaduto è che mentre per millenni l'umanità ha narrato non dal punto di vista dell'ego, ma del Sé, mentre anzi le storie sono nate e si sono diffuse proprio per dare espressione al Sé, progressivamente, e poi piuttosto improvvisamente, qualcosa è cambiato nell'assetto mentale dell'essere umano, coinvolgendo anche il suo modo di raccontare storie, nonché il carattere delle stesse. Il cambiamento può essere fatto risalire al periodo a cavallo tra il 1700 e il 1800. Fino ad allora l'umanità, nonostante lo strappo originario rispetto ad un completo stato di natura, si era trovata comunque ancora molto prossima ad un'istintiva unità con essa, con i suoi ritmi, con i suoi fenomeni, con la sua riconosciuta grandezza e potenza, ancorata come era rimasta, fundamentalmente, alla campagna,

<sup>9</sup> G. Ungaretti, *I fiumi*, in *L'Allegria. Vita d'un uomo. Tutte le poesie*, Milano, I Meridiani Mondadori, 2003 (Opera originale pubblicata nel 1931).

alla montagna, al mare, alle attività di allevamento, agricoltura, caccia e pesca. Con la Rivoluzione industriale invece tutto cambia. È difficile esagerare l'impatto psicologico che essa ha avuto sulla civiltà occidentale. Le nuove macchine, combinando una potenza senza precedenti con gli schemi rigidamente ripetitivi dell'ordine meccanico-industriale, contribuirono a rinforzare incredibilmente l'elemento strettamente razionale nella psiche collettiva. Grazie alle macchine l'umanità poté ammassare inaudite ricchezze e riplasmare il mondo. L'effetto di tutto ciò fu enorme, non da ultimo perché diffuse la sensazione che gli uomini stessero ora, come mai prima, emergendo dalla loro antica dipendenza dalla natura per diventare padroni del mondo circostante, capaci di controllarlo e piegarlo alle proprie esigenze e ai propri fini. Questo produsse, tra le altre cose, uno spostamento del centro di gravità psichico a partire dal quale gli scrittori immaginavano le storie.

Se fino all'Ottocento la maggior parte delle storie immaginate dall'umanità aveva riflettuto un'istintiva armonia con i valori del Sé (data la cornice culturale di credenze ed usanze che aveva ininterrottamente fornito alla gente un centro in qualche modo trascendente attorno a cui far ruotare le proprie vite), ora in molti casi i motivi tipici del narrare universale iniziano ad essere rifratti attraverso l'ego dell'autore, con la conseguenza che l'eroe diviene quasi immancabilmente di un nuovo tipo, fondamentalmente egocentrico e impossibilitato a raggiungere il suo scopo. Questo era avvenuto, per la verità, anche nelle tragedie classiche, ma in esse, narrate a partire dall'«oggettività» del Sé, l'eroe che andava incontro al fallimento era visto come responsabile del suo dramma e dunque, per quello che era l'equilibrio più profondo del cosmo (a cui le storie intendevano rimandare), come «giustamente» punito, mentre nella letteratura romantica e post-romantica l'eroe è semplicemente qualcuno che non ottiene ciò che vuole perché perseguitato da un avverso fato, da sfortunate circostanze, è qualcuno che non subisce trasformazioni interiori nel corso della vicenda e resta infelice, frustrato, tristemente perso, suo malgrado.

Un altro effetto di questo mutamento psichico, per quel che riguarda le storie che vengono narrate a partire dall'Ottocento è che, avendo esse perso contatto con i valori profondi del Sé, si fanno iper sentimentali. Tese ad indulgiare sulle debolezze del protagonista anziché a seguirne uno sviluppo interiore, le storie diventano una semplice forma di intrattenimento, spesso morboso, rispetto, appunto, alle storture dell'ego. Riescono comunque a giocare sulla risposta emotiva – condizionata in modo archetipico – del pubblico, ma in una maniera superficiale ed esteriore.

La dimensione trascendente dell'esistenza umana, gradualmente spinta nell'inconscio dalla coscienza sempre più unilaterale dell'uomo occidentale (dimensione trascendente che aveva costituito per millenni l'impulso primo e la cornice stessa delle storie, che aveva determinato la loro struttura in qualche modo compiuta e oggettiva, e che aveva coinciso con ciò a cui esse, sempre, rimandavano, perché era percezione condivisa che la vita avesse una sua sfera

«soprannaturale») riemerge a cavallo dell'Ottocento – come ben spiega anche Aldo Carotenuto nella sua analisi della letteratura dell'orrore<sup>10</sup> – in una forma sentimentalizzata e 'inferiore' – si pensi alla diffusione del romanzo gotico, con la sua galleria di figure chiamate ad incarnare nel loro piccolo e in modo inquietante il soprannaturale: fantasmi, vampiri, oscure presenze di cui stiamo vivendo, peraltro, in questi anni, nella letteratura per adolescenti di tutto il mondo, un revival tutto da analizzare.

Ciò a cui si finì per puntare, attraverso le storie, in epoca industriale (anche dal punto di vista editoriale), fu non più un rimando equilibrato e pieno di senso a quella dimensione «ulteriore» a cui l'uomo, rischiando di dimenticarlo, per natura appartiene (in quanto parte di un flusso di vita più ampio e generale della sua dimensione individuale), ma un effetto capace di suscitare la massima reazione emotiva nel lettore.

### *Non più archetipi, ma stereotipi*

Criticando la mutata letteratura del loro tempo, per esempio Wordsworth e Coleridge<sup>11</sup> teorizzarono come essa non fosse più preoccupata di pervenire o far pervenire ad una qualche comprensione. Come fosse bidimensionale, indugiante in immagini fisse, stereotipate (sembra si riferiscano ai romanzi più venduti anche del nostro tempo): queste immagini possono essere usate per creare nella nostra coscienza un effetto desiderato, ma non hanno alcuna connessione con le profondità della vita, «non sono altro che un gioco di ombre sulla parete»<sup>12</sup>. L'effetto di queste storie sulle nostre menti può essere straordinariamente potente, ma questo dipende dal fatto che, come nei sogni ad occhi aperti, ad agire è la suggestione. «Se si tolgono da molta della letteratura e poesia tipica del romanticismo parole come sconosciuto, infinito, straniante, misterioso, oscuro, incantato, fatato, fantasma, aleggiante, nebuloso, sognante, tremante, tempestoso, tremendo, spaventoso, agghiacciante etc., ciò che rimarrebbe di tante storie famose e molto amate non sarebbe più interessante da leggere dell'elenco telefonico»<sup>13</sup>. Potrebbe essere un esercizio interessante da fare, anche direttamente con i ragazzi, su certi testi da loro molto letti.

Si mette a punto, nella letteratura del periodo romantico, un catalogo di immagini suggestive e non risolte, sospese e misteriose, che continuano, evidentemente tutt'oggi, a rivelarsi efficaci perché fanno presa sullo stato d'animo di un

<sup>10</sup> A. Carotenuto, *Il fascino discreto dell'orrore. Psicologia dell'arte e della letteratura fantastica*, Milano, Bompiani, 1997.

<sup>11</sup> W. Wordsworth, S.T. Coleridge, *Ballate Liriche*, Milano, Mondadori, 2003 (Opera originale pubblicata nel 1800).

<sup>12</sup> Booker, *The Seven Basic Plots. Why We Tell Stories*, cit., p. 651 (traduzione dell'autore).

<sup>13</sup> *Ibid.* (traduzione dell'autore).

essere umano che, pur con tutti i suoi progressi materiali, è diventato inquieto, frustrato, smaniante per qualcosa che non può avere e a cui non sa dare un nome<sup>14</sup>.

Il contatto diretto con le profondità del Sé, che portava a concepire storie in qualche modo compiute, si perde. Il modello in base a cui, pur con tutte le varianti, si erano forgiate le storie per millenni, si infrange. L'ego si introduce e con lui il nebuloso sentimentalismo, la disintegrazione della forma, la sensazionalistica ricerca dell'effetto speciale. Un modo per ottenere quest'ultimo è stata, sempre di più, la sfida a quelle che nel proprio tempo possono essere considerate vecchie convenzioni morali per poter entrare in un mondo dove tutto si può osare ed è lecito dire. Ciò di cui non ci si rese conto, cercando storie sempre più provocatorie in questo senso, è che questo nuovo regno «libero» sarebbe stato soggetto in realtà a regole proprie, una delle quali è la compulsione a spingere sempre un po' più in là i limiti di ciò che è ammissibile o consentito. «I termini che esprimono il maggior elogio per un nuovo romanzo sono diventati, oggi, 'eccitante', 'scioccante', 'audace', 'disturbante', 'sconvolgente', dato che evidentemente ogni nuova pubblicazione cerca di strappar via ancora un altro strato di quello che è considerato socialmente accettabile. Ogni volta però che si superano dei limiti diventa necessario, la volta successiva, aumentare la dose per poter sostenere il senso di novità da cui questa spirale dipende»<sup>15</sup>. In un certo senso, cioè, la narrazione diventa solo una cornice per questi momenti di massimo sensazionalismo, una caratteristica evidente nei recenti successi letterari per adulti così come per gli adolescenti. Il nuovo mondo della letteratura, per quanto possa sembrare variegato, si è ristretto nel suo scopo e nella sua gamma di contenuti. Le storie che, centrate interamente sull'ego e sulle sue rivendicazioni, vengono tagliate fuori dal senso e dallo scopo più ancestrale del narrare, non possono risolversi, fa notare Booker, cioè non vanno da nessuna parte. Quello che sembra, sotto il controllo cosciente dell'autore, il libero gioco della fantasia, provenendo appunto dal centro cosciente della mente umana anziché da quello più profondo, inconscio e universale, in realtà non è affatto un gioco libero, bensì uno governato da un'urgenza molto precisa, nonché esclusiva: sconfiggere le regole e i valori del Sé, rimuoverne le immagini simboliche e perfino la nostalgia, non puntare più né ad una fine coerente né ad una forma compiuta. Più questo processo di rivendicazione di poter dire, come autori, quello che sembra soggettivamente importante e soprattutto quello che fino ad un certo punto non era considerato lecito si è fatto strada, nel nuovo regno di supposta e conquistata libertà, più la gamma di immagini e motivi con cui poter giocare in realtà si è ristretta, e quelle immagini e quei motivi sono diventati ripetitivi e sterili. Non si può negare che sia un'analisi che corrisponde piut-

<sup>14</sup> T. Todorov, *La letteratura in pericolo*, Milano, Garzanti, 2008 (Opera originale pubblicata nel 2007); G. Steiner, *Dieci (possibili) ragioni della tristezza del pensiero*, Milano, Garzanti, 2007 (Opera originale pubblicata nel 2005).

<sup>15</sup> Booker, *The Seven Basic Plots. Why We Tell Stories*, cit., p. 471 (traduzione dell'autore).

tosto bene alla gran quantità di storie narrate anche oggi soprattutto per ragazzi, dove il settore «adolescenti» e «giovani adulti» si è in particolare moltiplicato e si rincorrono libri che, nel tentativo di scioccare, di mostrarsi audaci, di presentare vicende dai toni e dai temi «forti», finiscono in realtà per ripetersi e somigliarsi, e per produrre, libro dopo libro, una ripetuta sensazione di sgomento, incertezza e sospensione nel lettore, per vicende lasciate volutamente, modernamente, non risolte. Per non dire dell'idea, tutta nuova, di una letteratura che, per presentarsi come originale, sembra debba oggi farsi specchio quanto più perfetto della realtà imitandone il caos, la frammentarietà, il linguaggio triviale o spiccio, la pochezza, lo squallore, l'aleatorietà, il vago non senso, qualcosa che appunto si oppone a quello che sembrava il fine ultimo del narrare delle epoche passate, in cui le storie nascevano proprio per ri-creare, attraverso specifici schemi linguistico-narrativi, la realtà e rappresentarla diversamente da come veniva altrimenti, nel quotidiano, percepita e vissuta. Solo il modo simbolico, metaforico, poetico, mitico, sembrava poter dire davvero, fino in fondo, la verità, una dimensione che interessava ai nostri predecessori assai più che la realtà.

Ciò che è massimamente interessante, di queste riflessioni, è il loro costituirsi come base di partenza per verificare poi «sul campo», in classe coi bambini e i ragazzi o, prima, nei nostri studi come accademici e/o educatori, quanto siano passibili di essere confermate o disconfermate dai libri per l'infanzia e l'adolescenza con cui ci troviamo a lavorare, quelli della tradizione e quelli più recenti, quelli nazionali e quelli di altri paesi. Su di esse possiamo «misurare» i titoli e gli autori che amiamo (o non amiamo) e capire forse meglio perché li amiamo (o meno), verificare se «i classici» sono tali per motivi che hanno a che fare con queste ipotesi, e chi tra i contemporanei è destinato, in questo senso, a restare, o comunque a lasciare davvero un segno. Dal più «semplice» albo illustrato per piccoli al più voluminoso e complesso romanzo per adolescenti, quello che raccontiamo e tramandiamo alle nuove generazioni rimanda, secondo l'idea qui espressa di cosa è letteratura, a ciò che è profondamente umano (e a considerazioni sul posto dell'uomo nel cosmo, sul suo rapporto col non-umano) o è superficialmente legato alle istanze e alle urgenze di moda nel nostro limitato quotidiano? La voce dell'autore è un'eco che sembra venire da lontano o è espressione del suo ego ipersociale, mondano? La forma e il contenuto dei libri per bambini (cioè la lingua, la struttura, le illustrazioni da un lato e la trama, la vicenda, la storia dall'altro) si combinano in un modo che sia capace, magicamente, artisticamente, di illuminare e dare senso alla vita – la nostra e quella dell'universo, o meglio la nostra intrecciata a quella dell'universo – o di questo non ci preoccupiamo, perché sono altre le funzioni che attribuiamo alla lettura? Quali sono, nel caso, queste altre funzioni? Hanno a che fare con la letteratura?





# Time and reading

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**ABSTRACT:** The frequent claim that you do not read for want of time ends up to glimpse a connection between time and reading that is worth further consideration to the inherent educational value. We are convinced that the problem does not concern just a better «management» of the time. The reading education in fact cannot be separated from an education at the time. The problem in the awareness of what the time for each of us since it is this time that the reading needs. Our reflection then, is about the definition of a personal time. We need to be aware of the existence and importance of an interior time and we need to grasp its value to us irrespective of any results visible to others. The ability to be alone with a book, and the desire to read in order to be at one with ourselves for a while is not innate; it is something that needs to be taught.

**EET/TEE KEYWORDS:** Time; Reading; Education at the time; Teaching of reading.

## *Time and reading*

The term «time» is increasingly frequently associated with the term «reading», even to the point of becoming a sort of common cliché, according to which people do not read for want of time. This impression is supported by ISTAT (Italian Statistics Institute) annual data indicating that the majority of readers are of school age, while older people read less and less. So why is it that we seem to succeed in finding time for physical exercise and sports that benefit our well-being, but we fail to find time to read a book? This brings us to the question of what time means to a given individual, how we govern our interior time, a time not given to us, but deliberately sought. We must then ask ourselves whether our education promoted the value of time in the same way that it promoted the value of reading. If some of the people who, in their childhood, at school and elsewhere, were involved in educational programs designed to teach them the

value of reading are among those who now claim that they do not read because they do not have, or cannot find the time to do so, then the problem lies primarily in the sphere of our formal education. The problem is how to nurture the seeds sown with our early reading education. This makes us wonder whether our reading education may need to be associated with an education on the value of time in order for reading to become a deeply-rooted existential and indispensable part of our whole life. The previously-mentioned cliché that people, more or less plausibly, justify the fact that they do not read because they lack the time thus points to a link between time and reading that warrants further analysis in terms of its intrinsic educational influence. This link brings together two extremely complex terms – «time» and «reading» – that have at various times attracted the attention of scholars and researchers in various fields.

It seems wise to start by clarifying what we mean by these terms, since it would be wrong to reduce the debate to the simple matter of how people can make optimal use of their time. Reasoning on some claims made by the novelist and critic Tim Parks, who suggested that we need to schedule our reading time, Oliver Burkeman said that, «Deep reading requires not just time, but a special kind of time which can't be obtained merely by becoming more efficient. [...] The approach of efficiency in fact makes of time something instrumental or, in other words, is something that the enables us to reach a result»<sup>1</sup>. So we set aside a certain amount of time to dedicate to a certain activity – in our case to reading a book. But the problem cannot be framed in terms of mere time management, allocating some time to reading, in the sense of a result to be achieved alongside others. In our opinion, the problem concerns our awareness of what time means to each of us, because reading demands a special, personal time that entails being willing to risk «inefficiency». We have to take the view that we can do something without worrying about serving a particular purpose evident to others. We need to consider that some apparently goalless activities (judged a waste of time in terms of our efficiency) are actually highly significant in our lives. We can do something that we know might be pointless in utilitarian terms, and return to what Nuccio Ordine<sup>2</sup> described in a brief but intense essay as the great universe of the usefulness of the useless. The time it takes cannot be scheduled. It is a personal after-hours of our own, deliberately personal, and impossible to shape according to an impellent need to serve some purpose, or be profitable in some way. We need to be aware of the existence and importance of an interior time and we need to grasp its value to us irrespective of any results visible to others. Before we go any further, we therefore need to try to better define what we mean by interior time.

<sup>1</sup> O. Burkeman, *How to find time to read*, «Guardian», 3 April 2015.

<sup>2</sup> N. Ordine, *L'utilità dell'inutile. Manifesto*, Milano, Bompiani, 2013.

## Time

Saint Augustine wrote, «What then is time? If no one asks me, I know; if I want explain it to a questioner, I do not know. But at any rate this much I dare affirm I know: that if nothing passed there would be not past time; if nothing were approaching, there would be no future time; if nothing were, there would be no present time»<sup>3</sup>. The nonexistence of past and future, since the first has already passed and no longer exists, just as the future has yet to exist, focuses our attention on the present as a time of existing, a here and now, but it must necessarily set in the past «If the present were always present and never flowed away into the past, it would not be time at all, but eternity»<sup>4</sup>. St Augustine thus lends the terms past, present and future a new meaning that allows for their existence. The present is central to the concept: «there be three times; a present of things past, a present of things present, and a present of things future», and these forms can exist in the soul as «present of things past, memory; present of things present, sight; present of things future, expectation»<sup>5</sup>. The accent is on a present, on a present soul: the soul measures time<sup>6</sup>.

St Augustine places the emphasis on a subjective, intimate, unique time, a time perceived and experienced or, better still, time as a flow of life experiences. It is an example of Bergson's snowball effect, not a mere sum of single units because time, however minimal, has a duration: preservation of the past in the present, real duration. This duration that separates two instants is therefore indistinguishable from memory, which restores the connection between such two instants. The duration is the real time perceived and experienced, and therefore any conceivable time. Duration thus implicates an awareness that lies at the bottom of things, to which we attribute a time that lasts<sup>7</sup>.

Returning to St Augustine's question, «What then is time?», and alternatively to the conception of time as duration, Heidegger examines the forms of existence and its relationship with the world, arriving at an understanding of existential temporality, of the sense of *Da-sein* as a temporality. *Da-sein* is temporality in the sense not of a property, but of a way of man's being inasmuch as he exists: *Da-sein*, in its extreme possibility of being, *is* time itself, not in time. Time is thus defined as a way of existing, such that our answer to the question «What then is time?» will involve identifying not so much the «what» as the

<sup>3</sup> Agostino d'Ippona, *Confessiones*; Engl transl., Augustine, *Confessions*, 2<sup>nd</sup> ed., Cambridge, Hackett Publishing Company, 2006, p. 242.

<sup>4</sup> *Ibid.*, p. 242.

<sup>5</sup> *Ibid.*, pp. 246-247.

<sup>6</sup> The impression, which things as they pass by cause in thee, remains even when they are gone; this it is which still present, I measure, not the things which pass by to make this impression. This I measure, when I measure times. Either then this is time, or I do not measure times; *Ibid.*, pp. 247-252.

<sup>7</sup> H. Bergson, *L'Évolution créatrice*, Paris, Félix Alcan, 1907; Engl transl., *Creative Evolution*, USA, Sheba Blake Publishing, 2015.

«how». A «how» that underscores the possibility of planning for the future. It is the problem of «being-there» concerned with the sense of «being», and that finds sense in «care» for things that come to be a part of our own existential project. Heidegger uses the term «care» to mean paying attention to the things of the world, where the world exists inasmuch as it consists of our awareness. The world is the very essence of our awareness by virtue of our intentional relations and the temporality reveals itself as the meaning of authentic care<sup>8</sup>.

From Augustine to Heidegger, time has thus come to be defined not as an external entity that participates in some way in our being, but as man's very particular way of being constitutively *in* the world, and time exists as an openness to the world.

Defining a time that is being «per se» brings us back to the idea expressed at the start of this discussion relating to the need to develop our awareness of this specificity and to restore the temporal dimension of our existence, instead of taking an «efficientist» approach. In our opinion, the claim that «we don't have time to read» stems from an idea of time as something given us from outside, something juxtaposed and this juxtaposition ultimately obliges us to maximize – in terms of quantitative efficiency – by achieving visible, recognizable results. Hence our incessant, frenetic efforts to fill all the empty bottles sliding along the conveyor belt described by Gary Eberle<sup>9</sup>. We risk unwittingly succumbing to an inexorable performance-based logic typical of economic «efficientism». Alain Badiou, one of the greatest contemporary French philosophers, speaks of our submission to a «real» that can be seen as a normative horizon apparently interpreted exclusively in economic terms<sup>10</sup>. If instead we adopt a different starting point and interpret our being as a temporality that implicates an openness to the world, then reading becomes a continuous path of self-awareness of our being-in-the-world.

We should read because it is by reading that we can experience our situated, spatially and temporally identified existence and openness to the world, irrespective of whether the effects of what we read are apparent and measurable by others. The dimension of reading, that we associate with the pleasure of reading, thus refers to an intimate, personal domain that can make us feel human. So, if asked «what is the purpose of it?», we can simply answer that reading is part of our search for sense. Drawing from the words of Badiou, it is by reading that we can experience the real not as a form of submission, but «as an imperative for our emancipation»<sup>11</sup>. Reading becomes a sort of individual apprenticeship that enables us to access the real by making us understand and be aware of the possibility of the impossible. This means that we can access

<sup>8</sup> M. Heidegger, *Sein und Zeit*, Halle, Max Niemeyer, 1927; Engl transl., *Being and Time*, New York, State University of New York Press, 2010, pp. 335-350.

<sup>9</sup> G. Eberle, *Sacred Time and the Search for Meaning*, Boston, Shambhala, 2003.

<sup>10</sup> A. Badiou, *A la recherche du réel perdu*, Paris, Fayard, 2015.

<sup>11</sup> *Ibid.*, p. 32 (my translation).

the real, not by analyzing it, but by reclaiming what that the real denies us by subjecting us to its normative imperative.

*Reading words, reading experiences: encounter with narrativity*

Continuing to clarify the terminology, we should now seek to understand what we mean by reading. As St Augustine put it, if we did not remember letters just pronounced, we would be unable to understand words, which would be mere meaningless, disconnected sounds. Memory – «the present of the past» – is therefore what enables us to read. In the act of reading, man is able to gain direct experience of his temporality, of his being a point in time, here and now, that contains what he has retained of the past (the letter just read), but also his expectation of the future (the letter that he has yet to read). It is our memory that enables us to grasp the continuum of existential events. Memory is the surface on which the various pieces of an existential puzzle become open to relations (Heidegger's *Da-sein*). To grasp our own story, bypassing the risk of reducing the significance of life to a mere succession of events, demands the capacity to read and narrate our existence. The capacity for narration is the expression of a subject who knows how to grasp his own existence as a unicum, a continuum, and who, in grasping it as a temporality, understands the sense of care for the things that come to be a part of their own existential project.

Narration, or story-telling, is what – according to Jonathan Gottschall<sup>12</sup> – has always made humans different from other animals. It dominates human life and is essentially a way of organizing our interior world in order to attribute meaning to our experience. Narration is therefore also basically an activity related to reading, intended as a deciphering not of signs on a page, but of experiences: reading our experience in the world – a reading that always focuses on man as a spatially and temporally defined entity aware of his temporality. So we can define narrating, like reading, in a setting of personal, inner discovery in which man succeeds in perceiving his being-time and the meaning of his existential narration.

We can now consider two possible ways of reading insofar as the human reader exists and is capable of recall, by means of which he succeeds in connecting the single signs on the page, in deciphering and understanding their content, just as he also succeeds in making sense of single life events. The outcome of both ways of reading makes sense, but they are not interchangeable. Reading becomes an experience of sense that enriches my being-in-the-world: «Every new book I read comes to be a part of that overall and unitary book that is that the sum of my readings. This does not come about without some effort: to compose that general book, each

<sup>12</sup> J. Gottschall, *The Storytelling Animal. How Stories Make Us Human*, New York, Houghton Mifflin Harcourt, 2012.

individual book must be transformed, enter into a relationship with the books I have read previously, become their corollary or development or computation or gloss or reference text. For years I have been coming to this library, and I explore it volume by volume, shelf by shelf, but I could demonstrate to you that I have done nothing but continue the reading of a single book»<sup>13</sup>. The only book is the personal story of our existence. Reading helps us to reach into the depths of our being, says Proust, and this is its beneficial function: «Reading is at the threshold of the spiritual life; it can introduce us to it; it does not constitute it»<sup>14</sup>.

Narrating something to create meaning is an element distinctive of every individual's flow of time and of literary production. There are two narrativities that interrelate in the act of reading, where the writer's narration (which is a part of his/her search for sense) comes to life because there are readers (each with their own narrations) who read it. The written page thus becomes an opportunity for a relationship between two narrativities that are never definitive or complete enough to provide any sort of permanent, thorough explanation. They suffice, however, to give us a measure of how every impression of having arrived at a comprehension is extremely aleatory, and this certainty of incompleteness drives a further effort of interpretation, a further search for sense. No reading can be said to be definitive, and this is proof in itself of the reader's freedom. Nobody can impose the most appropriate (and consequently definitive) reading. It is the readers who, by reading, lend a wholly personal sense to what they read. On this aspect, Alberto Manguel speaks of the amazing paradox implicit in the relationship between writer and reader, in that, by creating the role of the reader – the person who will decipher and give voice to the written signs – writers ultimately sign their own death warrant. It is only when writers have completed their work that they can abandon their text to a life of its own, which remains potential up until the moment when it is read<sup>15</sup>. «*Only when the writer relinquishes the text, does the text come into existence. [...] All writing depends on the generosity of the reader*»<sup>16</sup>.

There are different readings because readers differ. Different eyes read the pages. But there are also different readings by the same reader, in the light of changes in their own experience. In the former case, the diversity stems from

<sup>13</sup> I. Calvino, *Se una notte d'inverno un viaggiatore*, Milano, Mondadori, 2013, p. 256 (my translation).

<sup>14</sup> M. Proust, *Sur la lecture*, 1905; Engl transl., *On Reading*, Macmillan 1971, p. 39.

<sup>15</sup> «The books on my shelves do not know me until I open them, yet I am certain that they address me – me and every other reader – by name; they await our comments and opinions. I am presumed in Plato as presumed in every book, even in those I'll never read». A. Manguel, *A History of Reading*, New York, Penguin Books, 2014, p. 86.

<sup>16</sup> *Ibid.*, p. 169. In the deliberate incompleteness of Kafka's works Manguel recognizes, for instance, the assertion of the reader's freedom above all, the intention not to oblige the reader to a single and unique conclusion, and therefore a respect for the indecipherability of the sense of the world that is also the essence of its richness and that must leave every reader the freedom to decipher it in his own way. *Ibid.*, pp. 91-93.

the different experience of readers who may interpret the same work differently because they correlate it with their personal experience. In other words, what we read, our comprehension of it – how we interpret a novel, for instance – is ultimately part of our own existential narration because we understand it in the light of our own experience, and it simultaneously goes to enrich that personal experience. In the latter case, readers will read the same book differently if they do so at different times because of changes that will have taken place meanwhile in their body of experiences, in what ultimately distinguishes their being here and now, and their Da-sein as a future project. That is why a book may arouse different, even contrasting impressions, feelings, interpretations, when read at different times in life.

Reading per se thus has a dual meaning for us. On the one hand, we read a book in order to know its content and understand the existential narration of its author. On the other hand, we read our own existential experience, our own narration, on which our interpretation of the book depends, and to which it returns: every book is read by virtue of my being-there; it enters into a relationship with the present of the past, and with the present of the future, as St Augustine would have put it, and it becomes an integral part of my being as a potentiality. In our view, these two readings are two sides of the same coin: reading leads us to discover knowledge that is used in the construction of our sense of being, our Da-sein, and our existential planning capability. Every book that we read adds to our reading of a unique story that is the narration of our being-there as a reader. If we return now to what we said earlier about the definition of time as a human way of being, and we correlate this with what we have said about what we mean by reading, we can see that the act of reading exists inasmuch as it is an act of assertion of our temporality, of our being-in-the-world and of our openness to the world. To our mind, this means that a reading education cannot be separated from an education about time, otherwise reading is reduced to a mere juxtaposed task, a result to be achieved simply because it has to be done, and for which we must find a bit of time.

### *Educating about time for deep reading*

This brings us back to the problem from where we started, and that is the need to associate an already well-established reading education with an education about time, improving the awareness that time belongs to our consciousness, our spirit, our memories, our realization that we give life a sense with our capacity to narrate our existence, which consists of relations with others, including the writer-other.

When we read (unlike what happens when we listen to other people reading), our ego can exert its control over time: we can stop, skip over some words, or

pause for a moment on a sentence or two: we decide the time<sup>17</sup>. In this decision-making process, we experience our being temporality, and our reading as an individual act that brings the text to life<sup>18</sup>. The book, the written page, thus becomes an opportunity to establish an intimate relationship between the self and the page. Reading is always this: «there is a thing that is there, a thing made of writing, a solid material object, which cannot be changed, and through this thing we measure ourselves against something else that is not present [...]. Reading is going toward something that is about to be»<sup>19</sup>.

In order to exist, this material object – the book – needs an ego-reader to promote a conversation, the «fruitful miracle of a communication in the midst of solitude»<sup>20</sup>. In this relationship, readers step into the footprints left by the narrator; as we said before, they enter into the existential narration of the writer, because every book is part of, and speaks of its writer's *Da-sein*. We read what, for the author, has become a sort of conclusion; a novel, for instance, is a finished snapshot of its author's narration. As readers, we start with this material object – the book – and begin to enter the story, stepping in the narrator's footsteps that become, for us as readers, an incitement, a prod, an inspiration, a desire<sup>21</sup>. The other party is absent so the conversation between the book and the reader takes place in solitude. The writer's work becomes an opportunity because every reader, while he reads, is only the reader of himself, and there are as many readings as there are readers, each different, each belonging to only one reader. That is why the writer's work is only a sort of optical instrument provided by the author and sufficing to enable the reader to see what, without the book, they might not have seen by themselves<sup>22</sup>.

Reading thus reawakens the intellectual life of the reader, serving as an initiator, opening the door to our inner selves that we would have been unable to discover alone, «waking us to the personal life of the spirit»<sup>23</sup>. Reading is what Daniel Pennac called «an act of permanent creation»<sup>24</sup>, a search for understanding attainable by means of the intimate progress of our thoughts and the effort of our hearts. Comprehension is a search, a journey, a path along which readers tread in

<sup>17</sup> Calvino, *Se una notte d'inverno un viaggiatore*, cit., p. 66 (my translation).

<sup>18</sup> Writing which is there and will have a meaning «only when it is read by a single person and passes through his mental circuits», *ibid.*, p. 175 (my translation).

<sup>19</sup> *Ibid.*, p. 70 (my translation).

<sup>20</sup> Reading «consisting, for each one of us, in receiving another's thoughts, while all the time, ourselves, remaining alone, that is to say, continuing to enjoy the intellectual power which comes to us in solitude, and which conversation at once destroys – continuing in a state of mind which allows us to be inspired, to let the mind works fruitfully upon itself». See Proust, *On Reading*, cit., p. 36.

<sup>21</sup> *Ibid.*, p. 37.

<sup>22</sup> M. Proust, *In Search of Lost Time. Time Regained*, New York, The Modern Library, 1993. George Steiner speaks on this aspect of the book as a key to enriching one's experience; see G. Steiner, *Le livres ont besoin de nous*, Paris, Édition de l'Herne, 2003.

<sup>23</sup> Proust, *On Reading*, cit., p. 40.

<sup>24</sup> D. Pennac, *Reads like a Novel*, London, Quartet Books, 1994, p. 20.



the footsteps left by the writer, following the critical acts of life of which Matthew Arnold spoke.

While we read, we come into contact with a literary exercise that is not only interior, it demands that we become involved; it is the discernment of a man, of his being-in-the-world. In fact, the paradoxical virtue of reading lies in that of disengaging ourselves from the world in order to make sense of it<sup>25</sup>. The written page thus becomes «a key for interpreting how history unfolds, on the plane of sense and of its discernment; it is the research area by means of which 'I enter into a different world from that of my own life in order to discern the sense of the world'»<sup>26</sup>. In the written page we, as readers, enter into communication with the writer's elaboration (be it realistic, fantastic, utopian, satirical, or whatever), with his creation and his assertion in opposition to the world described by George Steiner<sup>27</sup>, and we thus become characters – taking responsibility for the action – on a journey that paves the way to our understanding of the world around us, but also of our inner worlds.

The act of reading is a relationship between reader and book, a sincere friendship, free of shallow compliments or hypocritical adulations; and «the atmosphere of this pure form of friendship is silence»<sup>28</sup>. The full enjoyment of such a conversation implicates a willingness to listen, and patience: the book is telling us something and we must settle down and listen carefully<sup>29</sup>.

The conversation encapsulates the opportunity to access a dual dialectic awareness: one in the reader of others' narrations, the other in a narrating man his own story by means of which he organizes his own inner world, giving a sense to his human experience. The figure that we leave behind in this interweaving of aware nesses is not translated immediately, or rather it does not have any immediate effect that we can manage and produce. That is why, referring again to Heidegger, the essential problem lies in that one of the most difficult things for modern man to understand is the importance of the goalless, of what does not subtend an immediate practical sense for some technical purpose. Even Proust associated the idea of having lost time with the very intimate and true fascination of reading: «There are perhaps no days of our childhood we lived so fully as those we believe we left without having lived them, those we spent with a favorite book»<sup>30</sup>. But precisely the difficulty of obtaining an «instantly translatable and spendable» outcome that makes an education about time so important.

The solution cannot be found in training courses designed to nurture the ability to decipher the written word, which is already in itself a very complicated cognitive

<sup>25</sup> *Ibid.*, p. 14.

<sup>26</sup> Editorial, *A proposito dell'utilità della letteratura*, «La Civiltà Cattolica», book. 3639, 2002, pp. 213-128, in part. p. 218 (my translation).

<sup>27</sup> G. Steiner, *Real Presences*, Chicago, The University Chicago Press, 1991, p. 11.

<sup>28</sup> Proust, *On Reading*, cit., p. 45.

<sup>29</sup> D. Mikics, *Slow Reading in a Hurried Age*, London, The Belknap Press, 2013, pp. 60-61.

<sup>30</sup> Proust, *On Reading*, cit., p. 3.

process for any individual because we are not biologically programmed to be readers<sup>31</sup>. Nor can the problem be tackled in quantitative terms: it is not a case of how much we read, but of «how» we read. The young and not so young might nowadays read more than they used to, but the reading (if we take for granted that it can be defined as such) practiced by the new generations goes in another direction from the book reading in the sense of what we have been discussing thus far. The human eye has become increasingly used to a form of reading that could be defined as a rapidly informative «snapshot», a reading for the purpose of grasping the information needed to achieve a certain goal, a rapid glancing over the page to pick out the item of interest and use the information obtained. This is a subsequent stage of what Eugenio Montale had already identified when considering the time people spent on reading, and noting that the practice of slow reading had almost disappeared: He said that people generally «just took a peek at, or a sniff of a book», and within five minutes «they already knew everything, and they was already sure whether the book was worth reading or not»<sup>32</sup>. Nobody would deny the practical utility of speed reading, just as Montale did not deny a certain utility of glancing over a book, but it should be clear that this is not tantamount to reading in the sense of developing a personal deep reflection. There is an increasingly evident danger of a superficial reading becoming the norm and the practice of deep reading being lost<sup>33</sup>. A book takes time. We need time to decode and assimilate its content, time to make contact and establish a relationship with a dual context – that of the book and our own personal context. Returning to our earlier comments, these are activities incompatible with the imperative of gaining maximum results in a minimum of time<sup>34</sup>.

Opening a book is like deep-sea diving. It demands a slow, thorough reading and concentration, which are fundamental premises for the pleasure we experience by entrusting ourselves to the written pages. George Steiner considers silence, a personal space and the physical availability of a book as the prerequisites for deep reading. But even before these requirements, we would place the ability to set aside a personal time that is acknowledged as a necessary part of our Da-sein because reading enables us to focus on ourselves, making our being-in-the-world more meaningful. The ability to be alone with a book, and the desire to read in

<sup>31</sup> On this topic, see S. Dehaene, *Reading in the Brain: The New Science of How We Read*, London, Penguin Books, 2009; M. Wolf, *Proust and the Squid. The Story and Science of the Reading Brain*, New York, Harper, 2007; S. Calabrese (ed.), *Neuronarratologia: il futuro dell'analisi del racconto*, Bologna, Archetipolibri, 2009.

<sup>32</sup> E. Montale, *L'arte di leggere. Una conversazione svizzera*, Novara, Interlinea edizioni, 1998, p. 14 (my translation).

<sup>33</sup> Deep reading as a «sophisticated process of comprehension, that is based on inferences. Deductive reasoning, the analogical capacities of the reader, the critical analysis, reflection and intuition», in M. Wolf, M. Barzillai, *The Importance of Deep Reading*, «Educational Leadership», vol. 66, 2009, pp. 32-37, in part. p. 33.

<sup>34</sup> On this topic see also G. Marchetta, *Lettori si cresce*, Torino, Einaudi, 2015.

order to be at one with ourselves for a while is not innate; it is something that needs to be taught.

According to Aidan Chambers, up until the age of 16 years, children should ideally have some free time set aside every day for independent reading during school hours<sup>35</sup>. An uninterrupted period of time during which they gradually learn to enter into the silent conversation that can be conducted between reader and book, and that demands a different mental state from listening, for example. Time spent reading is a time «sui generis, a refuge, a soothing balm, with silence as its custodian and container, antagonist of the more irritating acoustic interferences in our lives»<sup>36</sup>. To succeed in silencing the outside world, this special time demands attention, concentration, education, and habit, enabling us to develop an intimate conversation with ourselves. The silence with which readers immerse themselves in their book is what makes it possible to hear the words, what sets man's existence in motion.

Daily silent book reading is needed to teach individuals how to interrelate with a book. This relationship necessitates silence, concentration, and an individual's personal control over a spatial and temporal dimension in which their readings are independently chosen, and not assessed in any way: the only task is to become immersed in the written word. This means developing the habit of reading all the words on the page, reading them slowly, having the patience to become absorbed by the story, listening to the voice that is mentally reading the written words. It means understanding that reading entails a willingness to listen, that is also a willingness to become absorbed in the narration. Reading provides an opportunity to abandon the flow of juxtaposed time and enter into a «spiritual time», discovering a sense for our being-there. It enables individuals to draw on their experience as a person distinctive in their temporality, their «being time». As well as proposing books and the activities forming part of what we could define as an individual's reading education, in order to educate genuine and durable readers, we need to provide an education about time in the sense of enabling individuals to experience this sense of being time. Providing a reading education goes well beyond teaching an adequate capacity to decipher written signs: it also means teaching how to interpret these signs and understand the story narrated on the written page, how to enter into an unspoken conversation, experience one's own temporality, and realize that the book relies on us as readers in order to emerge from its dimension as a material object and become a reading experience that forms an integral part of our being-there.

<sup>35</sup> A. Chambers, *Tell me: Children, Reading & Tall*, Stroud, Thimble Press 1993.

<sup>36</sup> D. Demetrio, *Silenzi tra le righe*, «Liber», vol. XXVIII, n. 108, pp. 21-25, in part. p. 22. See also Mikics, *Slow Reading in a Hurried Age*, cit.



# Aus der Forschung der Schülermotivation im Muttersprachenunterricht in dem letzten halben Jahrhundert (In Bezug auf Slowakisch als Muttersprache)

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*The students' motivation in teaching Slovak as mother tongue in the second half of the XX<sup>th</sup> century*

**ABSTRACT:** This study is the author's own research of students' motivation in teaching Slovak as mother tongue on a subgrade of teaching experience and long-term research in several projects. In each section is teaching motivation of students in teaching mother tongue represented as following: After an introduction, which is driven by historical and scientific context, there is in part 1 presented a selection of specific features in development of pupils' motivation, part 2 describes the evolution of the profiling program in motivation effects and part 3 offers main results of the measurements of students motivational structure. The conclusion summarizes the main trends and opens some perspectives in the field of educational effect on children in the school education.

**EET/TEE KEYWORDS:** Mother tongue; Learning motivation; Motivation factors; Research tools; Primary and secondary education; Slovakia; XX<sup>th</sup> Century.

## *Einführung*

Bis 60er – Jahre des 20. Jahrhundert haben wir Erfahrungen im Bereich der Lernmotivation im Muttersprachenunterricht aus der Position des Studenten und Absolventen der Schulen in der Slowakei gehabt. Man kann sagen, dass das Niveau dieser Motivation allgemein niedrig war und das Schulfach slowakische Sprache und Literatur zu den wenig geliebten Unterrichtsfächern gehörte. Trotzdem oder richtig darum haben wir Lehramtsstudium für

slowakische Sprache und Literatur auch für deutsche Sprache und Literatur an der Hochschule absolviert haben. Wir wollten tiefer in die Problematik der Schülerprofilierung in diesen Schulfächern durchdringen und in diesem Kontext auch im Erziehungsbereich der Lernmotivation.

Unser Weg zur Schülermotivation im Muttersprachenunterricht als wissenschaftliches Forschungsproblem begann nach sieben Jahren Engagement in der pädagogischen Praxis an der Sekundarstufe der Schulausbildung. Der Autor dieser Studie hatte die slowakische Sprache und Literatur in den 70er-Jahren des letzten Jahrhunderts unterrichtet und auf Basis seiner eigenen Empirie überzeugte er sich wieder einerseits von der niedrigen Beliebtheit dieses grundlegenden Profilschulfaches, andererseits vom Abstieg der Lernmotivation der Schülerinnen und Schüler mit dem Alter in der Ontogenese der Schulbildung. Prinzipiell bedeutete dies, dass die schrittweise Erhöhung der Diskrepanz zwischen den Zielen und Absichten im Schulfach sowie der tatsächlichen Beteiligung der Studierenden an dem Bildungsprozess markiert wurde. Diese Spannung haben wir versucht, mit der Suche nach neuen Methoden und Strategien des Unterrichts zu reduzieren, durch eine konsistentere Erkenntnis der realen Lernmöglichkeiten der Schüler, auch durch das Studium zur Verfügung stehender theoretisch und fach-methodischen Ressourcen, oder mit den Lehrern in verschiedenen Kontexten zusammenzuarbeiten. Nach und nach kamen wir dazu, dass sich die Konzeption des Schulfaches an diesem Zustand der ungünstigen Lernmotivation der Schüler in relevanter Weise beteiligt hat und auch sein Projekt in grundlegenden zentralen pädagogischen Dokumenten, das heißt von der Seite der zentralen staatlichen Schulbehörden. Dies war ein Modell des beschreibungs-strukturellen Ansatzes zur Muttersprache und Stil im Hintergrund der systemischen Linguistik und Stilistik. Die pädagogischen Grundlagen (Curriculum) für die slowakische Sprache und Literatur waren in der Tat moderne erklärte Ziele und Aufgaben im Zuständigkeitsbereich der Entwicklung von Schülerpersönlichkeit auf dem Gebiet der Sprachkultur, aber inhalts-thematisch Teil des Lehrplans und in der Folge verblieben die slowakischen Lehrbücher für slowakische Sprache und Stil bei einer traditionellen systemisch-Struktur, bzw. auch unter dem Aspekt der funktionellen Auffassung im Sinn einer bestimmten, verkürzten Form der Schulkenntnisse der Linguistik und Stilistik. Darüber hinaus, war damals unser Schulwesen uniformiert, ideologisiert und im Lehrstoff zu dem enzyklopädischen Konzept kam es schließlich auch zu dessen Überdimensionierung. Diese wurde dann zwangsläufig zu einem bestimmten informativ-rezeptiven und Reproduktionsverfahren im Erziehungsbildungsprozess geführt. Es herrschte somit deshalb ein transmissives Lehrmodell, in dem der Schwerpunkt auf der Verwaltung der sprachlichen und stilistischen Kenntnisse faktuellder oder konzeptueller Art lag. Diese Dimension trat vor allem in Bezug auf grammatische Fragen in den Vordergrund, wobei das hohe Abstraktionsniveau speziell in der Muttersprache zum Ausdruck kam.

In diesem Zusammenhang u. a. behauptet der bekannte deutsche Philosoph H. G. Gadamer in der Arbeit *Der Mensch und Text*:

Das ist eine jener seltsamen Verkehrung der Natur der modernen Schule, dass sie Grammatik und Syntax nicht auf einer toten Sprache wie Latein lernen muss, aber auf ihrer eigenen Muttersprache. Von jedem, der die Grammatik der Sprache explizit erkennen sollte, die er als seine Muttersprache beherrscht, braucht sicherlich erforderlich enorme Leistung in der Abstraktion<sup>1</sup>.

Die ebenfalls anwesende kognitive Linguistin M. Schwarz<sup>2</sup> zeigt, dass Grammatikkenntnisse implizit sind, d. h. nicht direkt dem Bewusstsein zugänglich sind. Im Kontext der angezeichneten Relationen kann man sagen, dass die Schüler gerade bei der Grammatiklehre ein Problem mit dem Verständnis, bzw. ihrer Bedeutung haben, Wert und Nützlichkeit und ihren Sinn aufzunehmen, umso mehr, als dass sie ein junger Mensch in dieser Sprachgemeinschaft natürlich intuitiv und normalerweise ohne Probleme bereits im Vorschulalter erwirbt. Unsere empirischen Ergebnisse über den Abstieg der Lernmotivation mit dem Alter in der Schulbildung wurden später auch in den repräsentativen Forschungen bestätigt.<sup>3</sup> Der vorgeschlagene Konflikt zwischen den Zielen und Aufgaben der Lehre im Fach slowakische Sprache und Literatur (weiter auch SSL) und der Lernmotivation der Schüler führte uns nach und nach zu der Tatsache, dass wir uns mit diesem Problem intensiver beschäftigten, so auch auf der Ebene des wissenschaftlichen Ansatzes und der Forschung. Nach unserer siebenjährigen Tätigkeit in der pädagogischen Praxis haben wir deshalb beschlossen, uns an die Comenius Universität in Bratislava (Fakultät der Comenius-Universität in Trnava) zu begeben, wo wir uns im Rahmen der Dissertation in den Jahren 1976 – bis 1979 mit der Frage der Lernmotivation der Schüler im Grammatikunterricht der Muttersprache beschäftigten<sup>4</sup>. Die Grammatik haben wir aufgrund ihrer Spezifikationen, und so vor allem aufgrund ihres hohen Niveaus der Abstraktion, Systematik und Struktur, aber ganz besonders doch auch aufgrund der erheblichen Schwierigkeit bei der Entwicklung von Sprachbewusstsein im Zusammenhang mit dem Bewusstsein bei der Erkennung, Identifikation und Anwendung der grammatischen Spracheinheiten und Regeln in der Redetätigkeit.

<sup>1</sup> H.G. Gadamer, *Der Mensch und Text*, Praha, Oikoymenh, 1999, p. 26.

<sup>2</sup> M. Schwarzová, *Einführung in die kognitive Linguistik*, Praha, Dauphin, 2009, p. 39.

<sup>3</sup> Siehe B.J. Hvozdič *et al.*, *Motivation und Regulation in der Schülerpersönlichkeit*, Prešov, FF UPJŠ, 1994, pp. 35-38 u. a.

<sup>4</sup> Siehe M. Ligoš, *Zur Motivation im Grammatikunterricht der slowakischen Sprache*, Bratislava, PdF UK, 1979.

### 1. Spezifikationen bei der Motivationsentwicklung im Muttersprachenunterricht

Die Muttersprache ist völlig mit einer Person und Gemeinschaft verbunden. Man kann sagen, dass es sich außer der Vernunft, Wille und Emotionen um eine vierte, integrale Macht des Menschen handelt, tatsächlich realisiert der Mensch mit Sprache und Sprechen seinen Verstand, seinen Willen und Emotionen in den Intentionen seiner realen Selbstverwirklichung. Die Sprache weist eine anthropozentrische Natur auf und der Mensch wird als originales dialogische Wesen in der Interaktion mit anderen Menschen und der Gesellschaft gebildet, eng mit dem sprachlichen Bild von der Welt und von sich selbst gebunden, eine Sprachgemeinschaft entwickelt sich und schreitet mit einem spezifischen sprachlichen Bild von der Welt und des Lebens voran. In diesem Zusammenhang ist das aktuelle Konzept der Sprachkultur und Kompetenz der Menschen und der Gesellschaft zu verorten. Nach J. Dolník:

Sprachkultur ist die Summe der standardisierten Verwendungen der Sprache, die Mitglieder der sprachlichen Team wie seine eigene sprachliche Normalität und Komponente der kollektivbildenden Kräfte wahrnehmen, nämlich Kohäsionsbestandteil ihrer kollektiven Existenz<sup>5</sup>.

Von den angegebenen Zusammenhängen von Menschen, Gesellschaft und Sprache/Rede sind dann auch einige Spezifikationen bei der Entwicklung Schülerpersönlichkeit abzuleiten, bzw. ihre eigene Lernmotivation im Muttersprachenunterricht in der Schulbildung. An dieser Stelle heben wir einige der Schlüsselspezifikationen hervor, von denen wir bei der Forschung der Lernmotivation im Unterricht Slowakischen als Muttersprache ausgegangen sind.

Der essenziellste Parameter ist Selbstrealisation und Selbstverwirklichung des Menschen durch die menschliche Sprache in der Muttersprache. Dabei handelt es sich um ein entscheidendes Potenzial der Sprache, die grundlegenden psychosozialen und sogar biologischen, ästhetischen und spirituellen Bedürfnisse der Menschen zu treffen und zu entwickeln, besonders jedoch kognitive, emotionale und Kommunikationsbedürfnisse im Sinne der Interaktion. Im Geiste der bekannten A. Maslows<sup>6</sup> Hierarchie der Bedürfnisse geht es z. B. um den Bedarf der Erholung und sich zu entspannen, Sicherheit, Akzeptanz, Zugehörigkeit, Anerkennung, Selbstwertgefühl und Selbstvertrauen, ebenso um das Bedürfnis Respekt zu erfahren, Neugier, Wissen und Verstehen, Schönheit, Harmonie, ihr Potenzial zu erfüllen bis zu dem Bedürfnis nach Transzendenz in Bezug sich selbst zu übertreffen. Aus diesen allgemeinen Bedürfnisse und Naturmotiven des Menschen haben wir die inneren und äußeren Anreize in Bezug auf Wahrnehmung, Erwerb sowie zur Verwendung der Muttersprache im

<sup>5</sup> J. Dolník, *Die Kraft der Sprache*, Bratislava, Kalligram, 2012, p. 175.

<sup>6</sup> Siehe in P. Říčan, *Persönlichkeitspsychologie*, Praha, Grada, 2010, pp. 110-112.



Unterricht des Slowakischen definiert und spezifiziert. Insgesamt sind wir dann, im Einklang mit unseren pädagogischen Erfahrungen und theoretischen Ressourcen, einfach von dem Postulat ausgegangen, dass der Schüler im Muttersprachen und Literatur Unterricht «motiviert sein wird, wenn:

1. er sich in Lernaktivitäten einige seiner grundlegenden psycho-sozialen, kulturellen und emotional-ästhetischen Bedürfnissen ob Erwartungen auf dem Untergrund des realen Lernmöglichkeiten treffen und entwickeln wird;
2. er sich Sinn, Zweck und Nutzen des Lehrstoffes in Bezug auf das höhere Niveau der Beherrschung der Standardsprache als kulturbildender Mittel bewusst (erleben) sein wird;
3. er den Wert und die Bedeutung der Beherrschung der slowakischen Sprache und Literatur im Leben anerkennen und annehmen wird»<sup>7</sup>.

Wie bereits oben angedeutet, hängt bei der Entwicklung einer Lernmotivation der Schüler im Unterricht Slowakisch als Muttersprache Problem eng zusammen damit, dass der Schüler bereits auf implizite Weise sein Sprachbewusstsein und ein bestimmtes Niveau der Sprachkompetenz hat, und so vor allem auf der Ebene der impliziten konzeptionellen, prozesshaften und teilweise auch des metakognitiven Wissens. Die Verwendung der Muttersprache betrachtet er als ein natürliches, normales Phänomen, das untrennbar ist von seinem Denken, Verhalten, Handlungen und Gefühle, so dass es für den Schüler schwierig wird, die Frage nach dem Sinn, Nutzen und der Bedeutung des Unterrichts in der Muttersprache zu entdecken und zu erfahren. In Bezug auf die Entwicklung einer Lernmotivation wird uns die Ansicht helfen, bzw. Verfahren in der Richtung zur Konstitution des Sprachbewusstsein (angewiesen, reflektierend, kreativ usw) des Schülers und zum Erwerb von Sprachkultur, Sprache und Kommunikationsfähigkeit in der Muttersprache und Literatur, zu der neben der gesprochenen Form von Umgangssprache zur Schriftsprache, auch deren anderen Formen und Tätigkeiten hinzutreten, wie Lesen, Schreiben, Verstehen, Verwalten von Textkompetenzen auf der Basis der Sprachteilkompetenzen (phonetisch-phonologischer, orthoepischer, orthographischer, morphologischer, lexikalischer und syntaktischer) in Intention der Bildung auch Rezeption eines kultivierten und effektiven Sprachausdrucks, bzw. der Kommunikaté/des Diskurs in Verbindung mit der komplexen Handlung der verbalen, paraverbalen und außersprachlichen Ausdrucksmittel, sich eng überschneidend mit Ausdrucksmitteln verschiedener anderen Zeichensysteme (Schriftart, Musik, Bild, Bewegung, Farbe, Kunst, etc.). Die Spezifikationen des Muttersprachenunterrichts in Bezug auf den Motivationseffekt

<sup>7</sup> M. Ligoš, *Die Grundlagen der sprachlichen und literarischen Education I*, Ružomberok, FF KU, 2009, p. 79; Siehe auch M. Ligoš et al., *Die Entwicklung der Schülermotivation im Slowakisch Unterricht. Die aktuellen Forschungsergebnisse und Perspektiven*, Ružomberok, Verbum – vyd. KU, 2011, p. 46.

sehen wir teils von dem Punkt der Auffassung des Wesens der Muttersprache, teils in Bezug auf die Besonderheiten der Entwicklungsmöglichkeiten und Fähigkeiten der Schülerinnen und Schüler in der Primar- und Sekundarstufe, d. h. im Hintergrund einer Verbindung der Sprache und den Menschen<sup>8</sup>.

## 2. Die Profilierung des Programms der Motivationswirkung (PMW) im Muttersprachenunterricht (MU)

Mit der Lernmotivation der Schüler im Slowakischen als Muttersprache (MS), begannen wir uns theoretisch und praktisch in 70er-Jahren des letzten Jahrhunderts zu befassen. Neben der Entwicklung und Messung der Anreizstruktur der Studierenden im MU zielten wir, natürlich, auch auf die Forschung von Motivationsfaktoren oder Determinanten im Bildungsprozess ab. In erster Linie nahmen wir Kenntnis von dem Lehrer/Lehrerin der slowakischen Sprache und Literatur. Mithilfe einer breiteren Auswahl von Lehrern aller drei Bildungsstufen im ländlichen und städtischen Bereich realisierten wir zunächst mit der Befragung eine Forschung ihrer Erfahrungen und Einstellungen zum Motivationseinfluss im Unterricht der Muttersprache. Dann haben wir mit den Lehrern an mehreren Schulen gesteuerte Interviews über die Lernmotivation der Schüler durchgeführt<sup>9</sup>, dabei haben wir in Bezug auf die Fokusweise und den Workshop auch mit bei der Studienmethode speziell mit slowakischen Lehrern in Experimentalklassen gearbeitet (in drei Unterrichtsexperimenten mit längerem Zeitabstand wurden 20 Lehrer von Experimental-Klassen beteiligt).

Die Lehrer wurden hier direkt mit der Frage des Erkennens der Motivationsstruktur der Studierenden und mit dem gesamten System der Lehrmittel<sup>10</sup> verbunden. Bei der motivierenden Wirkung auf Schüler haben sich uns die folgenden Mittel als relevante gezeigt: Projekt und Konzept von Lehrfach, Wahl des Lehrstoffes und dessen didaktische und methodische Rendering (das Didaktik- und Edukationscurriculum), Berücksichtigung der Bedingungen und Kontexten des Bildungsprozesses, weiter das Kommunikationsniveau im Klassenzimmer, auch die Beziehung zwischen Lehrer und Schülern, die allgemeine Atmosphäre sowie das Klima im Klassenzimmer. Auf diese Weise hat sich nach und nach ein System, bzw. ein Programm der Motivationswirkung im Slowakischen und Literatur profiliert (PMW). In diesem Programm geht

<sup>8</sup> Id., *Die motivationalen und geistlichen Dimensionen im Slowakisch Unterricht*, Ružomberok, FF KU, 2003, p. 14, vgl. hier im Detail, pp. 14-20.

<sup>9</sup> Vgl. M. Ligoš, *Die Lehrer über Motivation*, in J. Findra (ed.), *Zborník Pedagogickej fakulty v Banskej Bystrici. Spoločenské vedy 8*, Bratislava, SPN, 1985, pp. 91-106.

<sup>10</sup> Id., *Zur Motivation im Grammatikunterricht der slowakischen Sprache*, cit., pp. 118-124, pp. 149-154; Id., *Die Grundmittel der Motivationswirkung im Unterricht Slowakisch in der Grundschule*, Banská Bystrica, Pedagogická fakulta, 1989, pp. 7-9.

es prinzipiell um qualitative Aspekte und die optimal integrierte Ausnützung des Potenzials dieser Faktoren im Bereich der Anreizwirkung auf Studenten. Mit diesem PMW der slowakischen Sprache und Literatur als Muttersprache haben wir zuerst in der Forschung in den Jahren 1986-1989 gearbeitet, dann haben wir es angewendet, modifiziert und innoviert in unseren anderen Forschungen im Bereich der Entwicklung der Lernmotivation der Schüler im Muttersprachenunterricht<sup>11</sup>.

Im Programm der Motivationswirkung im MU geht es um acht grundlegende Faktoren. Vier von ihnen haben einen potenziellen, relativ statischen, latenten Charakter und der Lehrer arbeitet mit ihnen in der Phase der Vorbereitung, Planung sowie Programmbeschaffung. Dazu zählen die folgenden Faktoren: 1. das Projekt des Schulfaches und des konkreten Bildungsprogramms (Ziele, Aufgaben, Konzeption, thematische Einheiten und Bereiche des Lehrstoffes, Prozesse, Bewertung, Diagnostik, etc.) 2. die didaktischen Mittel (Auswahl, vor allem die Wahl des Themas, Methoden, Strategien, Lehrmittel und Ressourcen) 3. Ziel-Mittel-Bedingungen–und Beziehungen (deren Berücksichtigung und gegenseitige Beziehungen unter realen Bedingungen des pädagogischen Handelns) 4. Familie und Umgebung des Schülers.

Die angegebenen Faktoren bilden eine potenzielle Grundlage für die Umsetzung der sinnvollen und wirksamen Motivationswirkung im Bildungsprozess. In der Umsetzungsgruppe von Faktoren profilierten sich eindeutig ebenso vier grundlegende Motivationsfaktoren dynamischer Charakteristik. Es geht um diese: 1. der Lehrer für Muttersprache und Literatur 2. der Schüler, Arbeitsgruppe der Schüler und die ganze Schulklasse 3. das Niveau der Kommunikation und Interaktion im Unterricht 4. Atmosphäre und das Klima im Klassenzimmer mit prosozialen Beziehungen zwischen den Akteuren des Bildungsprozesses. Es ist natürlich, dass die Umsetzung des Lehrens und Lernens von Schülern mit motivierendem Effekt im Rahmen einer integrierten kognitiv-kommunikativen Konzept des Schulfachs slowakische Sprache und Literatur sich nur beim Treffen des Lehrers/der Lehrerin mit den Schülern ergibt, in der Regel mit einem Team der Schulklasse bei konkreten Umständen des pädagogischen Handelns. Insgesamt geht es uns darum, dass der Mensch im Zentrum dieses Geschehen in untrennbarer Verbindung mit seiner Muttersprache in Form der konkreten Redetätigkeit in einem Gleichgewicht der Sprach-Rede und metasprachlichen-Rede und in der Dimension in Intentionen des erwarteten Erwerbs von Sprache-Kommunikation und literarischer Kompetenz der Schülerinnen und Schüler in der Muttersprache betrachtet wird.

<sup>11</sup> *Ibid.*, p. 9; siehe auch M. Ligoš, *Die Möglichkeiten der Entwicklung der intrinsischen dynamischen Kräfte der Schülerpersonlichkeit im Slowakisch Unterricht*, Ružomberok, KPF Žilinskej univerzity, 1999, pp. 40-69 oder Ligoš et al., *Die Entwicklung der Schülermotivation im Slowakisch Unterricht. Die aktuellen Forschungsergebnisse und Perspektiven*, cit., pp. 103-106.

Wir haben dann in Jahren 1991-1995 in unserer eigenen Praxis im Rahmen der partizipativen Aktionsforschung dieses PMW im vierjährigen Projekt angewendet und erprobt<sup>12</sup>. Und kann man sagen, dass diese Applikation erfolgreich war. Von den Motivationsfaktoren an der ersten Stelle haben sich der Lehrer, Schüler und Lerninhalt gezeigt, dabei positive intrinsische Motivation hat deutlich gestiegen und auf dieser Basis auch Lehrleistung im didaktischen Test. Als symptomatisch war der Aufstieg der positiven Motivation bei den schwachen Schülern der untersuchten Klasse. PMW im MU haben wir zuletzt in der breitkonzipierten Forschung in den Jahren 2009-2011 benutzt (siehe weiter im 3. Teil dieser Studie).

### *3. Die grundlegenden Ergebnisse der Messung der Schülermotivation im Muttersprachen-unterricht*

Die Frage der Entwicklung von Forschungswerkzeugen für die Messung der Lernmotivation der Schüler haben wir synthetisch ausführlich in einer umfangreichen Studie behandelt<sup>13</sup>. In dieser Studie haben wir uns speziell auf zwei eigene Forschungsinstrumente konzentriert, und so auf den Fragebogen und die projektive Methode für Schüler, die wir im Kontinuum von ca. 40 Jahren nach und nach in zwei Arten von Skalen-Fragenbögen der Lernmotivation der Schüler im Unterricht Slowakisch konstituiert haben. Bei der letzten Verifikation dieser unseren zwei Forschungsinstrumente haben uns starke Anregungen in den letzten Jahren zwei Publikationen angeboten<sup>14</sup>. Auf dieser Grundlage haben wir in den Jahren 2013/2014 mit modernen statistischen Verfahren (Mittelwerte, Faktorenanalyse, Cronbachs Alpha u. a.) Fragenbögen in zwei Typen des Skala-Fragenbogen (insbesondere in Bezug auf Validität und Reliabilität) transformiert und objektiviert, und zwar: *Fragenbogen der Lernmotivation der Schüler im Unterricht Slowakisch (DUMŽ 1/SJL)* für die 1. Stufe der Grundschule (Primarstufe) und *Fragenbogen der Lernmotivation der Schüler im Unterricht Slowakisch (DUMŽ 2/3 SJL)* für die untere und obere Sekundarstufe<sup>15</sup>. Und jetzt nähern wir uns die grundlegenden Ergebnisse der

<sup>12</sup> Siehe Ligoš, *Die Möglichkeiten der Entwicklung der intrinsischen dynamischen Kräfte der Schülerpersonlichkeit im Slowakisch Unterricht*, cit., pp. 106-116.

<sup>13</sup> M. Ligoš, J. Holdoš, *Aus der Genese der Kreation der Forschungsinstrumente für Messung der Motivationsstruktur der Schüler im Slowakisch Unterricht (der Muttersprache)*, «Didaktické studie», vol. 7, n. 1, pp. 11-33.

<sup>14</sup> Es handelt sich um die synthetische Publikation von P. Gavora unter dem Titel *Erstellen eines Forschungs-instrumente für Bildungsforschung*, Bratislava, SPN, 2012 und zu Lehrfächern oder zur gesamten Lernmotivation orientierte Referenznormen stellt die Publikation von V. Hrabal, I. Pavelková, *Was für einen Lehrer bin ich*, Praha, Portál, 2010.

<sup>15</sup> Siehe Ligoš, Holdoš, *Aus der Genese der Kreation der Forschungsinstrumente für Messung der Motivationsstruktur der Schüler im Slowakisch Unterricht (der Muttersprache)*, cit.

Messung der Schülermotivation im Muttersprachenunterricht, die wir in den letzten Jahrzehnten erworben haben.

In unserer Forschung befragten wir die Lernmotivation der Schüler im Unterricht der Muttersprache auf allen drei Stufen der Schulbildung, d. h. im Primar- und Sekundarbereich. Natürlich, die Messergebnisse waren vor allem von der Methodik und Konzeption von Forschungswerkzeugen abhängig, ebenfalls auch von der absichtlichen motivierenden Aktivität in experimentellen und Kontrollgruppen (Proben) von Schülern, also von der Qualität der einzelnen Faktoren innerhalb eines Incentive-Programms (siehe oben, PMW im Muttersprachenunterricht). Es ist interessant, dass die Motivationsdimensionen der Schüler auch von der breiteren sozio-politischen Rahmensituation in der Gesellschaft beeinflusst wurden. Z.B. Verhältnisse in dem ehemaligen sozialistischen Totalitarismus der 70er-Jahre des letzten Jahrhunderts, als die Bildungsprogramme einheitlich, uniform vom Zentrum bestimmt waren, die Schüler haben empfindlicher auf die absichtliche Anreizwirkung reagiert als in der aktuellen demokratischen offenen Gesellschaft<sup>16</sup>. Bei der Messung haben sich uns relevante, «statistisch signifikante Unterschiede und besondere Tendenzen vor allem im Hintergrund der Ontogenese Schulbildung und nach Geschlechtsangehörigkeit gezeigt». Nähere Informationen über die erworbene Ergebnisse haben wir in den oben genannten Monographien publiziert, die von der Ausarbeitung der Dissertation im Jahr 1979 im Intervall von ungefähr zehn Jahren (1979, 1989, 1999 2011) veröffentlicht wurden, oder in synthetischer Form in der umfangreichen Studie im Jahre 2015<sup>17</sup>.

Insgesamt in unseren Umfragen «im Kontinuum der über vier Jahrzehnte verfolgten Forschungsinstrumente haben 1582 Studenten aus allen drei Stufen des Bildungssystems in der Slowakei, der Tschechischen Republik und der Bundesrepublik Deutschland unsere Unterlagen ausgefüllt». An diesem Punkt nähern wir uns einigen der grundlegenden Erkenntnissen und Tendenzen im Bereich der Lernmotivation der Schüler im Muttersprachenunterricht. Als charakteristisch zeigte sich das Sinken der positiven Lernmotivation mit dem Alter. Dieser Trend haben wir bereits in den 70er-Jahren des letzten Jahrhunderts erfasst, wenn wir die Lernmotivation in der niedrigen Sekundarstufe (Sekundarbereich I.) verglichen haben, konkret in den 5. und 8. Klassen der Grundschule. Bei den Schülern des 8. Schuljahrs haben wir eine geringere Lernmotivation der Schüler im Unterricht Slowakisch und Literatur als in der 5. Klasse Grundschüler festgestellt. Insgesamt war in dieser Bildungsstufe der Anteil der Schüler im Motivationserfolg im Kontinuum von 40% auf 60 %, d. h.

<sup>16</sup> Vgl. Ligoš, *Zur Motivation im Grammatikunterricht der slowakischen Sprache*, cit., pp. 203-211; Id., *Die Grundmittel der Motivationswirkung im Unterricht Slowakisch in der Grundschule*, cit., pp. 14-32; Ligoš et al., *Die Entwicklung der Schülermotivation im Slowakisch Unterricht. Die aktuellen Forschungsergebnisse und Perspektiven*, cit., pp. 106-131.

<sup>17</sup> Ligoš, Holdoš, *Aus der Genese der Kreation der Forschungsinstrumente für Messung der Motivationsstruktur der Schüler im Slowakisch Unterricht (der Muttersprache)*, cit.

im Durchschnitt rund 50% gewesen, dabei haben die Schüler auf die absichtliche Motivationswirkung in Bezug auf die angezeichneten gesellschaftlichen Bedingungen so reagiert, dass der Anteil des Motivationserfolgs und in der Lernleistung (mit den didaktischen Tests gemessen) im Ausgang (nach ca. 2 Monaten des Unterrichts) in den Experimentalklassen um etwa 20 - bis 25% höher als in den Kontrollklassen war<sup>18</sup>. Diese Tatsache war für uns ermutigend, sodass wir für einen weiteren Zeitraum, wie oben erwähnt, unsere Forschung auf die Spezifikation der grundlegenden Motivationsfaktoren im Slowakisch Unterricht in der Primarstufe (Grundschule) konzentrierten.

Im Hintergrund der projektiven Methode, Fragebogen und selbstkontrollierten Arbeitsblatts für Schüler der Primarstufe haben wir zwei essenzielle Ergebnisse aufgenommen. Während eingangs der motivationale Erfolg im Unterricht Slowakischen im Bereich von 40% - bis 60% lag, erhöhte sich am Ausgang nach der absichtlichen Wirkung in den Versuchsklassen das Motivationsniveau auf 64% - bis 68% (nach Selbsteinschätzung der Schüler ist der Motivationsanteil bis zu 98% gestiegen), in den Kontrollklassen sank es im Gegensatz auf 40%, bis zu 55% (nach Selbsteinschätzung der Schüler maximal bis zu einem Niveau von 77%). Angesichts der Besonderheiten des jüngeren Schulalters im Vordergrund ist die Tatsache als interessant hervorgetreten, dass die slowakische Sprache und Literatur am Ausgang in den Versuchsklassen der 3. Klasse auf den ersten Platz als beliebtestes Schulfach rangierte. Dabei ist es hier notwendig zu bemerken, dass bestimmte *Brüche* in der positiven Lernmotivation im Hintergrund negativer Unterrichtserfahrung ungefähr in dem 2.-3. Schuljahr in unserer Forschung bestätigt wurden. Insgesamt können wir schließen<sup>19</sup>, dass der Erfolg in der Motivationsstruktur der Schüler in experimentellen Klassen auch in der Lernleistung um 15% - bis 23% höher als in Kontrollklassen gestiegen ist, und so auf der Basis eines bestimmten Programms der Motivationswirkung im Slowakisch und Literatur Unterricht nach ca. 11 Unterrichtsstunden, an dieser Bildungsstufe konstatieren wir dabei am Ausgang in Bezug auf Erfolg der Motivation von etwa 50 - bis 88% Prozent, d. h. mit einem Durchschnitt von etwa 70% (nur in Ausnahmefällen bei den Eingängen, bzw. in den Kontrollklassen bei Ausgangsniveau von 30 - bis 50%).

Nach projektiver Methode, bewertet gewichtungsweise in der 5-Punkte-Skala, die Qualität der Motivation in der 3. Klasse Grundschule in der Slowakei kam bei 50,8% und in der BRD erreichte 56,8%<sup>20</sup>. Wenn wir in der projektiven Methode nur positive und negative motivationale Parameter (abzüglich der

<sup>18</sup> Vgl. Ligoš, *Zur Motivation im Grammatikunterricht der slowakischen Sprache*, cit.

<sup>19</sup> Vgl. Ligoš, *Die Grundmittel der Motivationswirkung im Unterricht Slowakisch in der Grundschule*, cit., p. 31.

<sup>20</sup> M. Ligoš, *Die Schülermotivation im Unterricht der slowakischen und deutschen Sprache*, «Slovenský jazyk a literatúra v škole», vol. 48, nn. 3-4, 2001-2002, p. 71; vgl. Ligoš, Holdoš, *Aus der Genese der Kreation der Forschungsinstrumente für Messung der Motivationsstruktur der Schüler im Slowakisch Unterricht (der Muttersprache)*, cit., p. 24.

negativen Motivation) bewerteten, so erreichte am Eingang der Anteil der erfolgreichen Motivation im Unterricht der SSL bei Schülern der 2. und 3. Klasse der Grundschule 70 bis 80% und nach dem Versuch in einigen Klassen kam der Anteil auf rund 87%<sup>21</sup>. In der 2. Stufe der Grundschule (Sekundarstufe I), konkret in der 7. Klasse der Grundschule (in der Bundesrepublik Deutschland Realschule), unter Berücksichtigung im Fragebogen verschiedener Arten von Motivation, rangierte die Anreizstruktur in Prozent in der Slowakei bei 53,1% und 52,8% in der BRD<sup>22</sup> die Messungen in den Jahren 2009 bis 2011 an dem Ausgang der Versuchsklassen (nach ca. 2 Monaten des absichtlichen Unterrichts) in der unteren und oberen Sekundarstufe reichten Prozentsatz durchschnittlich auf 53%-55%, dabei zeigte sich als symptomatisch ein signifikanter Anstieg der negativen Motivation in den Kontrollklassen<sup>23</sup>. In mehreren unseren Umfragen ging es als interessante und relevante Tatsache hervor, dass von verschiedenen Arten der Motivation im Vordergrund besonders die persönliche, bzw. persönlich-perspektive, kognitiv-persönliche, funktional kognitive, leistungssoziale, kognitive und negative Motivation in den Dimensionen der intrinsischen und extrinsischen Motivation auftritt.

In den Jahren 2013/2014 haben wir versucht, unsere Forschungsinstrumente zu überprüfen, um eine Lernmotivation der Schüler in den Unterricht der Muttersprache zur Objektivität und einer gewissen Standardisierung zu messen, sodass wir unsere Ergebnisse mit den Referenzdaten der Autoren Hrabal – Pavelková<sup>24</sup> vergleichen zu können. Auf Basis moderner statistischen Methoden haben wir die beiden Fragebögen zur Lernmotivation im Slowakischen Unterricht beendet, nämlich für den Primar- und Sekundarbereich<sup>25</sup> mit Bezug unserer Erkenntnisse, die sich zu Referenzmessungen der genannten Autoren nähern<sup>26</sup>. Wie wir sehen können, befindet sich die gesamte Motivation im Muttersprachenunterricht im Primarschulbereich auf dem Niveau des Durchschnitts (in einer 5-Punkte-Skala) von 4,17 mit Erfolgsquote 83,4%, in der Sekundarstufe I mit Durchschnitt 2,96 (59,2%), in der Sekundarstufe II auf dem Niveau 3,04 (60,8%), insgesamt an der Sekundarstufe durchschnittlich 2,99 mit einer Erfolgsquote von 59,8%. Obwohl Hrabal – Pavelková Referenzwerte für die gesamte Schulmotivation zeigen, sind unsere Ergebnisse mit Hrabal – Pavelková fast identisch. Z. B. gesamte Motivation bei Hrabal – Pavelková<sup>27</sup> in der Sekundarstufe I ist etwa 3,59, unser Wert 3,68, in der Sekundarstufe

<sup>21</sup> Ligoš *et al.*, *Die Entwicklung der Schülermotivation im Slowakisch Unterricht. Die aktuellen Forschungsergebnisse und Perspektiven*, cit., pp. 115-116.

<sup>22</sup> Ligoš, *Die Schülermotivation im Unterricht der slowakischen und deutschen Sprache*, cit., p. 73.

<sup>23</sup> Ligoš *et al.*, *Die Entwicklung der Schülermotivation im Slowakisch Unterricht. Die aktuellen Forschungsergebnisse und Perspektiven*, cit., p. 114.

<sup>24</sup> Hrabal Pavelková, *Was für einen Lehrer bin ich*, Praha, Portál, 2010, pp. 197-239.

<sup>25</sup> Siehe Ligoš, Holdoš, *Aus der Genese der Kreation der Forschungsinstrumente für Messung der Motivationsstruktur der Schüler im Slowakisch Unterricht (der Muttersprache)*, cit., pp. 11-33.

<sup>26</sup> Siehe *Anhang Nr. 1* in dieser Studie.

<sup>27</sup> Hrabal Pavelková, *Was für einen Lehrer bin ich*, cit., pp. 238-239.

II bewegt sich das Ergebnis 3,71 zu 3,74. Während Hrabal – Pavelková<sup>28</sup> im Tschechischen als Muttersprache durchschnittliche Wert an der 2. Stufe der Grundschule (das 7. Schuljahr verglichen) haben und weiterführenden Mittelschulen (Sekundarstufe II) im Verhältnis 2,7:2,6, gingen unsere Messungen Referenznormen des Durchschnitts für diese Bildungsstufen von 2,96:3,04 aus, ausgedrückt als Prozentsatz 54% zu 52% der tschechischen Schüler und 59,2% zu 60,8% für die slowakischen Schüler<sup>29</sup>. In unserer Messung der Motivation der Schüler im Unterricht haben sich uns zwei Grundtendenzen als relevant gezeigt.

Zuerst wurde «eine signifikante Differenzierung im Niveau einer Lernmotivation im Muttersprachenunterricht hinsichtlich Ontogenese bestätigt». Der erste große «Durchbruch» in der Struktur der Motivation und der Erfolg, den wir in dem 2.-3. Grundschuljahr aufgezeichnet haben, und perspektive Motivation ist in der Sekundarstufe I. in weiterführenden Schulen stärker gewesen.

In Bezug auf die Ontogenese jedoch wird die bedeutende Tatsache, dass «ein hohes Maß an positiver Motivation in der Primaschulstufe beibehaltet wird (ca. 80% Erfolgsquote), in der Sekundarstufe I jedoch sinkt sie deutlich um etwa 20%-30% herunter, während sie bei 50%-bis 60% bis zum Abschluss der Sekundarstufe II verbleibt. Zweitens zeigten sich die Differenzen der Lernmotivation nach dem Geschlecht». Während in der Grundschule die Unterschiede nicht bestätigt wurden, haben im Sekundarbereich der Schulbildung die Mädchen um etwa 10% bessere Resultate in Lernmotivation manifestiert. Im höheren Sekundarbereich wird dieser Unterschied zwischen Jungen und Mädchen leicht rückläufig. Hier würde es sich noch eignen, eine Erkenntnis über das schwache oder durchschnittliche Niveau der Korrelation zwischen der schulischen Klassifizierungsnote und der Lernmotivation der Schüler anzugeben. Auf der anderen Seite jedoch wurde mit der Erhöhung der Lernmotivation die Erhöhung eng mit den schulischen Leistungen von Schülern in Form von «kommunizierenden Röhren» verflochten.

### *Schluss*

Lernmotivation als Lerngesetz weist eine komplexe Natur (Charakteristik) auf und bezieht sich auf das gesamte Bildungsprozess sowie die gesamte Persönlichkeit des Schülers. Im Muttersprachenunterricht hat der Bereich der Schülermotivation außer den allgemeinen Aspekten auch seine Spezifikationen, die aus dem Wesen dieses grundlegenden und profilierten Lehrfachs in Beziehung zum Menschen hervorgehen, d. h. zum Lehrer, Schüler und zur Schulklasse

<sup>28</sup> *Ibid.*, pp. 198, 230.

<sup>29</sup> *Ibid.*, pp. 197-239 und *Anhang Nr. 1* in dieser Studie.



in konkreten, spezifischen sozio-kulturellen Kontexten. Auf Grundlage dieser Problematik der Erkennung und Entwicklung der Schülermotivation im Muttersprachenunterricht stellt sich ein wichtiger Aspekt des Bildungsprozesses in Bezug auf die pädagogische Praxis auch in einer Perspektive der weiteren Forschung dar. Mit den Veränderungen in den breiteren gesellschaftspolitischen, wirtschaftlichen und kulturellen Bedingungen ändern sich nämlich ebenso Schule, Lehrer und Schüler. Damit verbunden sind eine Dynamik, Vielfalt und Einzigartigkeit der Lernmotivation der Schüler im Bildungsprozess. Es wird deshalb notwendig sein, auch weiterhin den motivierenden Aspekt des Muttersprachenunterrichts in den neuen, nicht wiederholbaren Bedingungen sowie Kontexten der pädagogischen Praxis zu untersuchen.

Aus unserer Sicht bei der Forschung der Lernmotivation der Schüler im Muttersprachenunterricht erweisen sich besonders «drei grundlegende Bereiche als perspektiv». *Erstens* wird es eine weitere Entwicklung und Nutzung des Förderprogramms der Motivation sein (PMW). *Zweitens* kann sich die Forschung auf die grundlegenden Lernmotivationsarten der Schüler in ihrer gegenseitigen Durchdringung orientieren. Z. B. als entscheidend haben sich uns diese Arten von Motivation gezeigt: personal-perspektive, leistungssoziale oder kognitiv-personale, im Muttersprachenunterricht speziell mit den grundlegenden Sprachaktivitäten und Fertigkeiten verbunden, wie Hören, Lesen, Schreiben und Sprechen mit Verständnis. *Drittens* geht es uns darum, uns weiter der Forschung und Bildung der guten Forschungsinstrumente zu widmen, was in unserem Fall bedeutet, hauptsächlich die verarbeitenden Standard-Skala Fragebögen zu verifizieren<sup>30</sup> und so in Richtung Theorie und Praxis des Muttersprachenunterrichts zu gehen (ihre Stabilität im Zeit-Kontinuum, die Nutzung des Modells der konfirmatorischen Faktorenanalyse, die Ausnutzung eines gewichteten Durchschnitts etc.). In den angegebenen Relationen stellt die Lernmotivationsforschung der Schüler im Muttersprachenunterricht eine Herausforderung dar, weil, wie wir schon darauf hingewiesen haben, «etwa 50% Schüler der Sekundarschulbildung nicht lernen wollen», und dabei ein bis zwei Drittel dieser Schüler auf der Basis der sekundären extrinsischen Motivation lernen, außerdem unter dem Niveau ihrer realen Möglichkeiten, Begabungen und Fähigkeiten.

<sup>30</sup> Siehe Ligoš, Holdoš, *Aus der Genese der Kreation der Forschungsinstrumente für Messung der Motivationsstruktur der Schüler im Slowakisch Unterricht (der Muttersprache)*, cit.

*Anhang n. 1*<sup>31</sup>*Referenzwerte der Lernmotivation der Schüler im Unterricht der slowakischen Sprache und Literatur/Muttersprache und Literatur für den Primarbereich*

Motivationsfaktoren	Primarstufe
Persönlich-perspektive-kognitive Motivation	4,27 (SD 0,66) 85,4%
Leistungs-soziale Motivation	4,45 (SD 0,75) 89%
Motivation zusammen	4,33 (SD 0,59) 86,33%
Motivation zusammen mit Abzug der negativen Motivation	4,17 (SD 0,65) 83,4%

*Referenzwerte der Lernmotivation der Schüler im Unterricht der slowakischen Sprache und Literatur/Muttersprache und Literatur für den Sekundarbereich*

Motivationsfaktoren	Sekundarstufe I., II. zusammen	Sekundarstufe I.	Sekundarstufe II.
Persönlich-perspektive Motivation	3,44 (SD 0,74) 68,8%	3,44 (SD 0,75) 68,8%	3,48 (SD 0,73) 69,6%
Leistungs-soziale Motivation	4,1 (SD 0,71) 82%	4,16 (SD 0,73) 83,2%	4,07 (SD 0,68) 81,4%
Kognitive Motivation	3,57 (SD 0,83) 71,4%	3,46 (SD 0,84) 69,2%	3,65 (SD 0,79) 73%
Negative Motivation	3,21 (SD 0,96) 64,2%	3,25 (SD 0,92) 65%	3,14 (SD 0,99) 62,8%
Lernmotivation zusammen	3,58 (SD 0,42) 71,6%	3,57 (SD 0,45) 71,4%	3,59 (SD 0,40) 71,8%
Motivation zusammen (ohne negative Motivation)	3,7 (SD 0,55) 74%	3,68 (SD 0,60) 73,6%	3,74 (SD 0,52) 74,8%
Motivation zusammen (negative Motivation abgezogen)	2,99 (SD 0,6) 59,8%	2,96 (SD 0,68) 59,2%	3,04 (SD 0,62) 60,8%

Erklärung: z.B.

3,44 – Durchschnittnote

SD – Standardabweichung

68,8% – Durchschnittnote in Prozent konvertiert

<sup>31</sup> *Der Anhang* wird aus der Studie *ibid.*

*Scientific News  
and Activities  
of Research Centres*



Cronache scientifiche  
e Attività  
degli istituti di ricerca



# One hundred years since the birth of Dahl: an International conference on current perspectives of research. *Rebel Stories and Glittering Eyes. One Hundred Years with Roald Dahl* (Bologna, Children's Book Fair 2016, April 5<sup>th</sup> 2016)

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**ABSTRACT:** On the occasion of the centenary of Roald Dahl's birth, the Bologna Children's Book Fair in collaboration with the CRLI (Centro di Ricerche in Letteratura per l'Infanzia – Centre of Research on Children's Literature) has organised an international conference with the title *Rebel Stories and Glittering Eyes – One Hundred Years of Roald Dahl* (April 5<sup>th</sup> 2016), in which some of the most influential researchers on Dahl have participated, such as J.M. Held, S. Rennie, D. Sturrock. The aim of this contribution is to provide a critical review on the current state of the researches that investigate the life, the work and the poetics of R. Dahl – one of the main British writers in the field of Children's Literature within our 20<sup>th</sup> century – in light of the speeches that have been given and debated during the scientific event.

**EET/TEE KEYWORDS:** Roald Dahl; History of Children's Literature; Interdisciplinary; Imaginary; International Conference.

One hundred years after the birth of Roald Dahl – one of the giants in the field of Children's Literature within our 20<sup>th</sup> century – the Bologna Children's Book Fair in collaboration with the CRLI (Centro di Ricerche in Letteratura per l'Infanzia – Centre of Research on Children's Literature) has organised an international conference with the title *Rebel Stories and Glittering Eyes – One*

*Hundred Years of Roald Dahl* (April 5<sup>th</sup> 2016). The conference has constituted a precious opportunity for interdisciplinary reflections on the relevance and the novelty characterising the original production of the British author, who actuated a tangible change within the area of Children's Literature. Dahl, indeed, with the recklessness and the boldness of his narrative creations, has led this field of literature toward unexplored lands, while his notoriety among adults and children does not stop increasing.

It has been a really special event, during which the authors of the most important investigations on Roald Dahl's life and work were all sitting around the same table: the American philosopher Jacob Michael Held (curator of the book *Roald Dahl and Philosophy*), the linguist Susan Rennie (lecturer at the University of Glasgow and curator of the *Oxford Roald Dahl Dictionary*), the writer and director Donald Sturrock (author of the biography *Storytelling – The life of Roald Dahl* and of a film on the life of Roald Dahl, broadcasted in 1987 by the BBC). A significant introduction by William Grandi (professor of Children's Literature at the University of Bologna) opened the debate, which was coordinated by Maria Russo (Children's Books editor for the *New York Times*).

Roald Dahl, an author whose work has been translated in fifty-eight languages, who has sold over 2 million copies worldwide, whose overwhelming imagination and linguistic refinement are celebrated by the critics while characters such as Willy Wonka, the Big Friendly Giant and Matilda stand as eternal creations within the international literary scene – has inspired the creative flair of one of the preeminent contemporary illustrators: Quentin Blake. A perfect combination of the latter's graphic trait and the former's literary style was thus created, building a such close dialogue between text and image, that the two artists have remained indivisibly connected in the mind of the young readers. Right during the *Bologna Children's Book Fair*, the publisher Salani, on the occasion of the centenary of Roald Dahl's birth, has launched the series «Gl'Istrici Dahl», a hardbound edition of the collected works of the author, whose first seven titles have been already published.

Dahl's books, formerly defined as «classics of the future» have been source of visual inspirations and film adaptations (from *The Witches* by Nicolas Roeg, 1990, to *Matilda* by Danny De Vito, 1996, from *James and the Giant Peach* by Henry Selick, 1996, to *Charlie and the Chocolate Factory* by Tim Burton, 2005), whereas the movie theatres are awaiting the film *The BGF*, based on the popular homonym novel (in the Italian translation *Il GGG. Il Grande Gigante Gentile – The Big Friendly Giant*), directed by the film-maker Steven Spielberg and premiered at the Cannes Festival (May 13<sup>th</sup> 2016). The movie is the result of an exceptional collaboration between the Walt Disney Pictures and the American director, uncontested pioneer of the fantasy genre, who has asserted himself for the thoughtfulness and the sensitivity he has always shown in approaching childhood, the emotional experiences of this stage of life, its specific and particular imaginary.

After Roald Dahl's death, in 2005, the *Roald Dahl Museum and Story Centre* was inaugurated in Buckinghamshire. It is not only a space for children's workshops, which take place in three interactive galleries, but also the location of a valuable archive featured by the complete collection of Dahl's authentic handwritten works and letters (among which, the correspondence with other authors such as Terry Pratchett). In Buckinghamshire we can also find the *Roald Dahl Foundation* managed by Dahl's second wife Felicity Dahl. The foundation was established with the aim of providing support and funding within three specific fields: literacy, in relation to the promotion of reading as an irreplaceable educational tool; neurology, since Dahl's family was struck deeply by diseases and accidents; haematology, inasmuch as what caused Roald Dahl's death was a rare blood infection.

Regarded as a hero by his readers, the man behind the writer has remained however a mystery, which Sturrock has attempted to unveil. Close, indeed, is the relationship between Dahl's work and life. A connection which has to do with the conjunction of art and life, fiction and biography, so crucial in Children's Literature to become the object of the book, regarded by now as a classic, *Boys and Girls Forever* by the American scholar Alison Lurie. Dahl himself has written an autobiography, *Boy*, focused on his youth at Repton School. The book provoked a massive scandal in England, since it narrates the harsh and violent treatments that were common within the 30's Public Schools in the United Kingdom. It is quite hard to understand Dahl's poetic and literary principles without knowing his biography.

Dahl is an author who has always maintained a close connection with the memory of his childhood, and thank to this perspective he has been able to communicate with children. Some of his novels, from the aforementioned *Boy* to *Going Solo* and *The Wonderful Story of Henry Sugar* have retraced, through autobiographical allusions, the remembrances of his childhood, from which the author used to draw ideas for his books. These works describe his inclination to flight, so strong to become a daring pilot, constantly prompt to depict the odd sides of life, of the characters, of the situations. Nonetheless, Sturrock has provided us with an unknown slice of life of the writer. By accessing Dahl's private archive as well as hundreds of letters and notes, Sturrock disclosed, through his thorough investigations, unexplored aspects of the writer's life, helping us to understand the evolution of his ideas and his way of conceiving the world. I refer for instance to Dahl's belonging to two cultures – the Norwegian and the American one – from which the richness of comparison derives; to his odd mother and her strong personality, who was definitely an inspiration for the grandmother in *The Witches*; to the corporal punishments at school which transformed him in a marginalised and vulnerable student; to the war and the Raf, with the adventures, the accidents, the suffering and all that followed; to the depression caused by the misfortunes that struck his wife and children in the 60's. Dahl, indeed, had a longstanding familiarity with sorrow: he had

lost his father when he was 3 years old, a taxi hit the pushchair in which his newborn son was sleeping, causing a really serious skull fracture to him, his eldest daughter died when she was 7 years old after a meningitis outbreak, his first wife – the popular actress Patricia Neal – had been obliged to use a wheelchair due to a brain haemorrhage.

Inextricable have been the reactions of the author to these painful experiences, which affected his writing, and – among them – I would highlight the awful memories of his childhood at school. The cruelty expressed by the adults with whom he had engaged in the English schools, where the lashes regularly inflicted to the children were practically planned, was much more ruthless than the harshness distinguishing the characters of his books. It is no coincidence then, as Sturrock points out, that several of his characters are orphans, exactly as in Dickens. The latter is indeed one of the writers on which Dahl draws, writing pages full of pathetic attitudes, close to the situations depicted by Dickens, with child victims who manage to find their inner strength and overcome the pain.

Sturrock follows Dahl through the paths which reveal his double identity of writer for both adults and children (a trait that characterises, moreover, other English writers: from Rudyard Kipling to Robert Louis Stevenson, from Robert Graves to John Masefield or Ted Hughes), a double identity he was proud of, since he perceived children's books as one of the most important dimensions of the literary creation. Furthermore, Sturrock highlights the dissatisfactions and the limitations Dahl experienced in relation to the literature addressed to adults, before approaching Children's Literature. What comes out of Sturrock's work is the portrayal of a maverick writer, exactly as he appears while cycling backwards in a BBC documentary film, which was partially shot in his dwelling, the Gipsy House, in the city of Great Missended. The film was directed by Donald Sturrock, who has shown us some relevant excerpts during the conference.

R. Dahl – heir of the remarkable English literary tradition – is an enigmatic writer who has managed, through a magnificent narrative technique, to overcome the unpleasant and quite common separation between children's literature and literature *tout court*. Dahl masters quite a number of tools, marvellously described in *The Wonderful Story of Henry Sugar*, in which the author also recounts how he became a writer, providing several information about his profession. For instance, he tells of his first novel, his journalistic reports, his notes for fore-coming books, memories, advices, examples of fantasy narrations, the traces of the encounters which had been crucial in his work and in the actuation of his art. Furthermore, he drafts a sort of manual for those who want to become novelists. Dahl's writing is quite complex and it is characterised by a mouthy humour, a taste for provocation, the brilliant conception of literary funambulism, paradoxical combinations and a defiant attitude on a linguistic level. Dahl's semantic inventions and lexical creativity stimulate children's imagination and give a glimpse into a future in which their



liberation from the tyranny of adults – as for Sofia, the protagonist of *The BFG* – is, first of all, a linguistic emancipation. Above all, this type of narration is built on a wide knowledge of children's world, shown for instance through the children's dreams treasured in *The BFG*: an actual collection of desires, repressed by school and family education, and the faith in the imaginary as a game, well known by a child but already lost for an adult.

Susan Rennie, professor of English Language at the University of Glasgow, has attempted to conduce and curate, by writing the *Oxford Roald Dahl Dictionary*, a deep investigation focused exactly on Dahl's language, on his original modality to use ordinary language as well as on his peculiar linguistic inventions. She described us how this dictionary originated: «*The Oxford Roald Dahl Dictionary* is a new type of children's dictionary which aims at highlighting the richness and the diversity of Roald Dahl's use of language. It gives explanations of the words used by Roald Dahl in his much-loved children's stories – both his own invented words and everyday words – illustrated by thousands of quotations from his books».

What Susan Rennie did, during the conference, was to highlight some of the key features of this innovative and very extra-usual dictionary, showing how it aims both at informing and entertaining, while inspiring children (and maybe adult readers too) to be creative with language in a Dahlian way.

«This is not an ordinary dictionary», as Rennie points out.

After all, you wouldn't expect an *Oxford Roald Dahl Dictionary* to be ordinary, would you? Lots of dictionaries tell you what an 'alligator' is, or how to spell 'balloon' but they won't explain the difference between a 'ringbeller' and a 'trogglehumper', or say why witches need 'gruntles' eggs' or suggest a word for the shape of a 'Knid'. This dictionary does all those things. Any word that Roald Dahl invented is here, like 'biffsquiggled' and 'whizzpopping', to remind you what means what, but that is not all. You'll also find out where the words come from, rhyming words, synonyms and lots of alternative terms for words that are overused. Oxford Children's Dictionaries are perfect for supporting literacy and learning and this is the world's first *Roald Dahl Dictionary* created by the word experts at Oxford University Press. With real citations from Roald Dahl's children's books and illustrations by Quentin Blake, this is an authoritative, engaging and accessible work and it will inspire and encourage young writers and readers.

Indeed, as Luke Kelly (Managing Director of the *Roald Dahl Literary Estate* and Roald Dahl's grandson) observes in his review of the *Dahl Dictionary*,

It's hard to find the right word to express our levels of excitement for the *Oxford Roald Dahl Dictionary*. Squacking? Jumpsquiffing? Gigantuous? Roald Dahl's inventive, playful use of language is such a key element of his writing, whether he was using existing words in his own mischievous way or inventing extra-usual new ones. There could be no more fitting way to pay tribute to Roald Dahl in the year of celebrations for his centenary. Best of all, as a fully-functioning dictionary for readers and writers aged eight and above, I hope it serves as a swash boggling source of inspiration for a whole new generation of storytellers.

The contribution by Held, which turned out to be extremely interesting, has underlined the philosophical references – frequently hidden – that can be found within Dahl's production and which constitute the core of the book personally curated by the scholar: *Roald Dahl and Philosophy*. Held is professor of Philosophy at the University of Arkansas and he has investigated the relationship between philosophy and Children's Literature, analysing authors such as Dr. Seuss, well-known for his picture books (*Dr. Seuss and Philosophy*) or writers like Terry Pratchett (*Philosophy and Terry Pratchett*). His researches have given an original contribution to that branch of literature defined as *Philosophy for Children*.

As Held has explained during the conference: «For generations, elements such as humour, poignancy, fantasy and unfettered morality, which distinguish the most famous tales by the acclaimed children's author Roald Dahl, have captivated both children and adults. Classics like *Charlie and the Chocolate Factory*, *James and the Giant Peach*, *Fantastic Mr. Fox*, *Matilda*, and *The BFG* may initially appear to be yarns spun for the amusement of the adolescent mind, however, upon digging deeper one uncovers a treasure trove of philosophical richness that is anything but childish, and in fact reveals the true existential weight, as well as the multi-layered meaning of some of our favourite children's stories». In his work on Dahl and philosophy, Jacob M. Held has spotted insights of today's leading philosophers within the significances, messages, and greater truths at which Dahl's rhythmic writing winks, revealing a completely new way of appreciating the creation of a man and a mind to which readers of all ages are still drawn.

Dahl presents a fantasy world strikingly similar to our own, a chaotic world of meaningless suffering. Through his protagonists he provides models for responding to the world as it is, not as it should be. And so the reader is provided with a vision of how to respond to the world they find themselves in, and as such Dahl's works facilitate a reflective, philosophical approach to life. In his short talk, Held illustrated how transformative Dahl's work is and how it promotes a philosophical disposition in the reader through the narratives of young children struggling against an absurd and perilous world.

As stated by Held, 'stories show children how things can be, how they can be. Dahl provides a workable and laudable model for his readers, and he does this by bringing philosophical wisdom to bear on the real world through fantasy fiction. But beyond any simple lesson or hollow platitudes, Dahl's works provide a perspective, and the vested reader is transformed through those stories into one that identifies with that perspective and translates it into their own life'.

In particular, Held is an expert on Camus and locates, as such, the theme of rebellion in most of Dahl's novels. Rebellion enables the children protagonists to fight and give sense to life, making them believe that they can change reality through imagination. According to Held, Dahl provides readers with an extensive range of narrated experiences from which they can learn precious

lessons, through that philosophical disposition which allows one to represent possible identities who are able to challenge a reality often disappointing or «absurd», to use Camus' term. The concept of justice turned out to be really important, yet this horizon can be recognised and respected only by those who – paraphrasing the title of the conference – have got ‘glittering eyes’, namely, those children and those big authors who manage to narrate justice.

While these three relevant perspectives – the biographical one illustrated by Sturrock, the linguistic one depicted by S. Rennie and the philosophical one presented by J. Held – provide us with a new and at times surprising picture of Dahl, a picture that makes his work even more fascinating, William Grandi has stressed the deep change introduced by the author in the field of Children's Literature. A change that was possible thank to his peculiar creative path, through which he could, first of all, pass through and transform narrative genres, brilliantly combining horror with comedy, sentimental and fairy-tale, while several themes from Nordic folklore and popular stories have found new vibrancy when encountering a subtle sensitivity, which re-echoes Dickens. These are stories in which high and low, poetic and grotesque, humour and gravity merge in a soft yet deep narrative game. Moreover, the change introduced by Dahl has been determined by his courage to speak about problematic subjects such as the crisis of the traditional family, the madness of the consumerist system, the weakness of the education systems, through a specific and necessary magnifying glass: a child's eye. William Grandi has underlined exactly the theme of a child gaze on the world: a way of looking that allows us to appreciate the true and special modality through which childhood contacts reality. Matilda's magical eyes or Little Bill's glittering ones refuse the conventional and strict perspectives characterising the world of adults, a world which prefers to remove whatever is different and look at reality according to commonplaces or consolidated preconceptions. The British author thus has managed to seduce generations of young readers, shedding light on the ludicrous, comic and at times cruel situations that children, unfortunately, pass through during their growth: with no pretences nor hypocrisies, Dahl tells them real and important stories, consciously taking position against the conformism and violence that feature adults' world, frequently unable to understand the actual needs of childhood. A hundred years have passed since his birth, nevertheless Dahl's magic still flows through his marvellous books.



## Two recent international events on textbook research. The Symposium *Education in periods of political transition* and the Workshop *After the War. A New Beginning?*\*

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**ABSTRACT:** The present article proposes a report on two recent events devoted to textbook research. We refer to the Conference *Education in periods of political transition*, held in Berlanga de Duero (Soria, Spain) on 13<sup>th</sup>-15<sup>th</sup> April 2015, and the Workshop *After the War – A New Beginning? A Comparative Examination of Reading Primers Published and Used in 1945 in Europe*, held in Braunschweig (Lower Saxony, Germany) on 13<sup>th</sup>-14<sup>th</sup> November 2015. During these scientific reunions, schoolbooks were analysed from different perspectives, evidencing

\* All the paragraphs of this article are the result of a shared reflection between the authors. However, we specify that Anna Ascenzi and Kira Mahamud are responsible for section 1, while Elisabetta Patrizi is responsible for section 2. In addition, we point out that the translations of quotations in the text belong to the authors. Finally, the authors would like to thank Simona Szakács for her careful reading and useful comments to Braunschweig's workshop.

the different national research traditions of the promoters of these initiatives, from Nord and South Europe. The examination of textbooks and other sources offered by the authors in their presentations provided a varied and thorough panorama on the last trends which characterize textbook studies in Europe.

EET/TEE KEYWORDS: Textbook studies; Research centres; History of Education; Germany; Italy; Portugal; Spain.

During 2015 there were two important International events, in which schoolbooks were the protagonists. We refer to the Conference *Education in periods of political transition*, held in Berlanga de Duero (Soria, Spain) on 13<sup>th</sup>-15<sup>th</sup> April 2015, and the Workshop *After the War – A New Beginning? A Comparative Examination of Reading Primers Published and Used in 1945 in Europe*, held in Braunschweig (Lower Saxony, Germany) on 13<sup>th</sup>-14<sup>th</sup> November 2015. In these events different research traditions had the possibilities to meet and deepen their understanding of each other, allowing them to fulfil important experiences of effective internationalization. Indeed, the respective titles of these initiatives reflect very well the different research perspectives of the promoters, from which the topics proposed in each call for papers, arise. But the added value of these events consisted in the occasions of re-interpretation and comparison offered by the presentations of the speakers, who were in Berlanga de Duero and Braunschweig last year, besides the fact of being two activities organized in Southern and Northern Europe.

### 1. *A review on education in periods of political transition in Europe*

The International Symposium in Berlanga de Duero was promoted by the MANES Research Centre of the Universidad Nacional de Educación a Distancia (UNED) (Spain)<sup>1</sup> and the Centre for documentation and research

<sup>1</sup> The MANES Research Centre (Centro de Investigación MANES – Manuales Escolares: <<http://www.centroman.es>>) was founded in 1992 and moved from a research project born into the Department of History of Education and Comparative Education of the Universidad Nacional de Educación a Distancia (UNED), which has the purpose to study the textbooks produced in Spain between 19<sup>th</sup> and 20<sup>th</sup> centuries. During the following years, the MANES project became more ambitious and included other research areas, namely Portugal, Belgium and Latin America. One of the great achievements of the research centre consists in the MANES database, i.e. a large catalogue which gathers textbooks from Spain, Portugal, Latin America and Belgium. The database is available from the MANES Portal: <<http://servidorman.es/manes/consulta.html>>, (last accessed: May 10<sup>th</sup>, 2016). In this Portal we can find many useful research tools (Virtual Libraries, Bibliographies, Historical sources), information on the ‘history’ of the Research Centre (see section *Centro de Investigación MANES*), as well as the links to the

on the history of schoolbooks and children's literature (CESCO) of Macerata University (Italy)<sup>2</sup>. The Symposium was held within the suggestive context of the International Centre of the School Culture (CEINCE) in Berlanga de Duero<sup>3</sup>. Here, the scholars who participated in this scientific reunion discussed around the «national particularities and patterns of similarity in school education during periods of political transition»<sup>4</sup>. The main purpose of the Conference was well explained by one of the initiative's promoter, Anna Ascenzi (Research Centre CESCO), who underlined the necessity to delve deeper into an historiographical subject – as that of education during period of political transition – well known but still less studied, especially with a real comparative approach, based not only on the simple juxtaposition of national perspectives but on the effective comparison between the different research methodologies and historiographical traditions.

The Conference – as the other Conference's coordinator Kira Mahamud (MANES Research Centre) pointed out – had two main focuses: education as a tool to promote national identity and democratic awareness among people and education as a tool for ideological-political manipulations in totalitarian regimes. These subject matters corresponded to the two sections in which the speakers' speeches delivered during the three days of the Symposium: 1. *Education for citizenship in the transition from dictatorship to democratic societies or vice*

websites of the funded national and international research projects developed by the research team in recent years (see section *Proyectos de Investigación*).

<sup>2</sup> The CESCO Research Centre (Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia) was founded in 2004 at Macerata University (Italy), with the purpose to promote the research on Italian textbooks and children's literature published in 19<sup>th</sup>-20<sup>th</sup> centuries. Over the years, the Centre has enlarged its international vision, promoted several research projects, conferences and workshops in collaboration with other research centres and groups from different European and extra European countries. For an overall panorama on CESCO's activities see the website (available in Italian and English): <<http://www.unimc.it/cescom/>>, (last accessed: May 10<sup>th</sup>, 2016). An interesting profile of this institution is also provided by M. Brunelli, *The «Centre for the documentation and research on the history of textbooks and children's literature» in University of Macerata (Italy)*, «History of Education & Children's Literature», vol. 4, n. 2, 2009, pp. 441-452; R. Sani, *Il mio itinerario formativo e di ricerca nell'ambito della Storia dell'Educazione*, in S. Ulivieri, L. Cantatore, F.C. Ugolini (edd.), *La mia pedagogia. Atti della Prima Summer School SIPED*, Pisa, ETS, 2015, pp. 133-161.

<sup>3</sup> The CEINCE (Centro Internacional de la Cultura Escolar) is a Spanish institution promoted by the Schola Nostra Association, in collaboration with the Council of Education of Castile and León Autonomous Government, the Germán Sánchez Ruipérez Foundation and Valladolid University. The CEINCE is a centre of documentation and research, which aims to promote school culture, working on three main fields: the preservation of textbooks and children's literature (see CEINCE's catalogue), the organization of national and international colloquia (see CEINCE's blog) and the support of research and dissemination activities (such as exhibitions and educational laboratories). For further information see CEINCE's website (available in Spanish and English): <<http://www.ceince.eu/>>, (last accessed: May 10<sup>th</sup>, 2016).

<sup>4</sup> *International Symposium Education in periods of political transition, Call for paper*, p. 2. For a first approach to the historical category of transition see: J. Pradera, *La transición española y la democracia. Edición e introducción de J. Estefanía*, Madrid, Fondo de Cultura Económica, 2014.

*versa, 2. Political socialization in the transition from dictatorships to democratic societies or vice versa.*

In the first section there were two interventions from Italy and two from Portugal. Conference's work started with the report of Anna Ascenzi and Roberto Sani (CESCO Research Centre, Macerata University, Italy) on *The school and the education for democratic citizenship in Italy in the transition from fascist regime to Republic (1944-1958)*. The scholars explored the issue of democracy education in Italy during the period of transition from the fall of the fascist regime until the late 1950s. In this period, the speakers distinguished three main stages of the democratic society building process, marked by: (1) the decisions of the Sub-Committee for Education of the Allied Military Government, led by the American pedagogue Carl Washburn; (2) the project of school system reform proposed by the Minister of Education Guido Gonella (1946-1951); and (3) the introduction of civic education in the Italian school under the Minister of Education Aldo Moro (1958). Recurring also to a rich sample of primary school reading books published in the first fifteen years after the end of the Second World War, Ascenzi and Sani threw new light on «the features and the limits of the history of democracy and citizenship education in the Italian school system»<sup>5</sup>.

Justino Magalhães (Education Institute, Lisbon University, Portugal) reported on *Textbooks in the transition of the primary school to democracy in Portugal*. The scholar focused on political-ideological and socio-educational features of the transition period from the end of the Salazar dictatorship to the decade after the Carnation Revolution. He underlined the effects provoked by two key laws of this period: the Decree-Law N°. 47.587 of 10<sup>th</sup> March 1967, which allowed to overcome the logic of the single book, and the Law N° 28 of 14<sup>th</sup> October 1986, which ratified the entry into force of the new Portuguese Educational System. Magalhães also chose primary school textbooks as his primary source to examine the main educational changes occurred in this fundamental historical phase. He concentrated on the innovations experienced by schoolbooks production in these years, showing how – despite the persistence of the traditional curricular matrix – there was a gradual introduction of some important openness both on the side of contents and on the side of texts' structures.

From a different point of view and chronological range, the Portuguese transition period was analysed by Joaquim Pintassilgo and Maria João Mogarro (Education Institute, Lisbon University, Portugal). Their paper described the *Pedagogic experiences and education for citizenship in the Portuguese revolutionary process*, focusing on the role of teachers during the key years 1974-1976. Starting from the definitions of António Nóvoa («At the time when everything was possible») and Fátima Sanches («A real laboratory of pedagogical

<sup>5</sup> *International Symposium Education in periods of political transition, Dossier – Abstracts*, p. 1.



experiences»), the scholars demonstrated the political, economic and cultural incisiveness of the Revolutionary period for the process of transition from the *Estado Novo* to a democratic society. Unlike all the other Symposium speakers, Pintassilgo and Mogarro chose to focus their attention not on textbooks but on «teachers' voices», using interviews, discourses, pedagogical conferences, teaching courses and legislation on subjects' curricula. Through the integrations of these specific types of sources, the scholars demonstrated that during the Revolutionary period teachers constituted «a tool for change and in particular a tool for a pedagogical revolution»<sup>6</sup>.

With the presentation of Maria Cristina Morandini and Paolo Bianchini (Turin University, Italy), we returned to the discourse of civic education in Italy. In fact, the scholars presented a report on *The teaching of Civic Education in Italy since the school programmes of 1958 until today*. After recalling some of the conclusions exposed by Ascenzi and Sani, Morandini and Bianchini presented the main Italian educational laws applied from the end of 1950s until the Gelmini Reform of 2008, focusing on the interventions related to civic education. Once the politico-educational background had been described, the speakers outlined an overview of the textbooks for civic education published in the last fifty years, demonstrating that «civic education has been and still is an ancillary subject in Italian school»<sup>7</sup>.

Alberto Barausse's paper (Centre for documentation and research on the history of educational institutions, textbooks and children's literature – Ce.S.I.S., Molise University, Italy) opened the section *Political socialization in the transition from dictatorships to democratic societies or vice versa*. The scholar dealt with the topic of *National identity and textbooks in the transition from liberal democracy to fascist totalitarianism in Italy: the case of textbooks for Italian schools abroad and in the colonies (1921-1932)*. Barausse explained that since the post-unification period the Italian government promoted and financed Italian schools abroad, in particular those founded in the colonies, «to promote national culture and identity abroad». The rise of fascism intensified the nationalistic tone of education policies also in Italian schools abroad. The speaker demonstrated this assumption proposing a contents' analysis of the textbooks used in Italian schools founded in the large and complex Brazilian context between the two World Wars. In particular, he showed the large presence of nostalgic stresses and nationalistic topics (such as the exaltation of the First World War), oriented to instil a strong bond with the homeland and its imperialistic project in the young generation abroad.

A very original research perspective was presented by Yovana Hernández and Kira Mahamud (MANES Research Centre, UNED, Madrid, Spain) in

<sup>6</sup> All the quotations related to Pintassilgo and Mogarro's intervention are taken from the power point displayed by the speakers during the Conference.

<sup>7</sup> *International Symposium Education in periods of political transition, Dossier – Abstracts*, p. 7.

the presentation of a research in progress, entitled *The economic dimension of political socialization in school textbooks from the Spanish transition to democracy*. The scholars presented part of a research project that aims to «analyse the role played by the economic culture transmitted in the primary school during Spanish transition to democracy as a factor of the manifested political socialization»<sup>8</sup>. The main primary source adopted by Hernández and Mahamud are Social Sciences textbooks from last grade of the primary education level in Spain after the 1970 Education Act. Textbooks are explored with the support of the educational law and curricula. The main results of this research and work in progress consisted in the demonstration of the strong interconnection between economic school knowledge and early school political socialization, thus interpreting that there is an economic component in the process of political socialization.

Bento Cavadas (Lusophone University of humanity and technology, Lisbon, Portugal) also chose to work on with textbooks as primary sources, but focusing on a school subject which has not been much studied: science textbooks. Cavadas gave a paper on *The transition of Portuguese science textbooks from dictatorship to democracy: From textbooks to memorize to textbooks that stimulate reflection*. The scholar examined the many changes that science textbooks underwent during the Portuguese transition from a dictatorship to a democracy. These changes were determined by the passage from the single textbook to the liberalization of the publication market, which implied the rise of a new phase in textbook's writing, design, contents and use: from the single author to the multidisciplinary team of authors, from an inner organization in lessons to a multiple organization, from black and white images to colourful images, from the small format and poor quality paper to a bigger format with a good quality paper, from a learning methodology devoted to contents memorization to a methodology projected at personal reflection. But this 'creative period' was short. In fact, Cavadas showed how this phase was broken by the detection of scientific errors and critical points which brought to introduce a «process of evaluation and certification of textbooks, controlled at a central level»<sup>9</sup>.

Virginia Guichot (Seville University, Spain) delivered a speech on *Political socialization and formal education: school textbooks of Social Sciences in the Spanish transition to democracy*. Which model of citizenship was suggested by Spanish textbooks of Social Sciences during the democratic transition? This was the key question which guided Guichot's research. The scholar, by virtue of a meticulous content analysis, gets to the conclusion that during this historical phase: «there was not a great interest in the construction of the citizen

<sup>8</sup> *Ibid.*, p. 10.

<sup>9</sup> *Ibid.*, p. 12.

dimension of the individual»<sup>10</sup>. She showed that in Social Sciences' textbooks we find a concept of citizenship which calls for a citizen without a strong political culture and identity, but that simply participates at elections, respects social order, leaves important decisions to politicians, and belongs to a «system of loyalties». Although the citizen is part of his own autonomous community, the Spanish country and Europe too, nonetheless he has a passive role. He perceives himself as part of Humanity as well, due to his Christian identity and not for his political convictions.

A different perspective on textbook research, focused on the iconographical aspect, was proposed by Lucia Halder (Georg Eckert Institute, Braunschweig, Germany). The scholar explored the issue of *Picturing Regime Change. Images of socialism in German history textbooks*. Halder moved from the idea that the visual contents of textbooks reflect the political changes of historical phases and demonstrated this statement focusing on German history textbooks in the decade before and after 1989. After presenting the main changes occurred in Germany after 1989-1990 (collapse of socialism, reunification of Germany and end of Cold War), Halder analysed the old and new representations of socialism, using the methodological approach of visual history and supporting her examination with the theoretical categories of memory studies, in order to understand how the visuals contribute to the evolution of German identity in the key period of transition before and after the end of the East-West conflict.

The last paper of the Conference was given by Miguel Somoza (MANES Research Centre, UNED, Madrid, Spain). He presents his research on *Political education of the sovereign. Citizenship, monarchy and republic during the late Franco regime and the transition to democracy*. Once the different historiographical interpretations given to the Spanish transition were reconstructed, Somoza analysed the concept of sovereign in Spanish textbooks considering a double point of view. On the one side, he explored the image of sovereign derived from dictatorship structures and on the other side he examined the sovereign of citizenship as a consequence of the democratic society. This perspective allowed him to point out the changes and continuities in citizenship education strategies carried out at school before and after the end of Franco's regime.

A brilliant summary of the Symposium was presented by the director of the CEINCE, Agustín Escolano, who underlined how «the school has its time, that is a time different from the political one, because it is an anthropological time», which responds first of all to the capacity of communities and single people to assimilate historical changes. Escolano also emphasized the numerous contact points between the historiographical perspectives adopted by the scholars in their research papers, recalling the importance of academic events, such as the

<sup>10</sup> *Ibid.*, p. 14.

very same international Symposium of Berlanga de Duero, to enhance mutual understanding.

In this direction, also the coordinators of the Symposium Anna Ascenzi and Kira Mahamud closed the three intensive working days of Conference with the auspices to organize and attain a long series of similar events based on the comparison between different historical and historiographical themes, subjects and concerns. It was agreed to promote a specific European historiographical horizon, that is – in their opinion – the ‘natural destine’ of the internationalization process lived by history of education research as well as the main road to follow in order to work towards an authentic comprehension of the cultural and educational facts studied by historians of education.

## 2. *Primers after 1945 under scrutiny*

The necessity of a serious comparative approach was also underlined during the workshop in Braunschweig, but the core question around which the scholars were called to intervene was different. *After the War – A New Beginning? A Comparative Examination of Reading Primers Published and Used in 1945 in Europe*: this was the title of the international workshop held in Braunschweig (Germany) on 13<sup>th</sup> and 14<sup>th</sup> November, 2015. The workshop was jointly organised by the Georg Eckert Institute for International Textbook Research (hereafter GEI) in Braunschweig, the Research Library for the History of Education (hereafter BBF) at the German Institute for International Educational Research in Berlin, and the Reading Primers Special Interest Group (hereafter RP-SIG) of the International Society for Historical and Systematic Research on Textbooks and Educational Media (hereafter IGSBi) in Essen<sup>11</sup>.

<sup>11</sup> The three promoters are well-known research groups and institutions of international reference for textbook studies. GEI was founded in 1975 (although its origins go back to the work of the historian Georg Eckert in the 50s of the 20<sup>th</sup> century). It is a non-university research centre of excellence, devoted to enhance historical and cultural studies on textbooks and educational media. The BBF was founded in 1876. It is an international research library and archive for research on the history of education. Since 1992, the library is part of the German Institute for International Educational Research (DIPF), the institute belonging to the Leibniz Association, just like GEI. The RP-SIG is a scientific network, established in 2009, and its goal is to promote historical and interdisciplinary research on primers and didactic media employed in the teaching of reading. The IGSBi is a scientific society founded in 1997 to «further the interdisciplinary, historical and systematic research on textbooks on a large scale and to bring its importance to public attention». In 2013 the society changed its name to International Society for the Historical and Systematic Research on Textbooks and Educational Media, in order to embrace research on all kinds of educational media. For further information on Workshop's promoters, see their official Websites: <<http://www.gei.de/en/the-institute.html>>, <<http://bbf.dipf.de/en>>, <<http://www.philso.uni-augsburg.de/en/lehrstuehle/paedagogik/igschub/society/>>, (last accessed: May 10<sup>th</sup>, 2016). On the history and activities promoted by GEI you may also see E. Patrizi, *Building a better society*

The key purpose of this event was to analyse, «the development, design, content, and use of reading primers in European countries in 1945 from a comparative perspective»<sup>12</sup>.

As it is well known, primers traditionally represent the first textbook which the pupils know at school and through which they acquire basic literacy competencies. But primers are much more than a simple educational medium for teaching and learning how to read and write. According to the new trends of textbook studies, primers – as well as textbooks – hide a ‘universe of meanings’ directly linked to the cultural context of reference, which come into light particularly during periods of political and social changes<sup>13</sup>. But – as GEI’s director Eckhardt Fuchs underlined during the workshop introduction – primers, unlike disciplinary manuals, allow us to better appreciate the general cultural approach of the specific historical phase in which they are produced. In this perspective, the post-war period represents a very significant phase of European history. From these considerations originated the idea to invite scholars from different European countries to discuss on «individual primers published in 1945 and/or used in 1945/46 school year», in order to encourage a comparison between different approaches to the history of textbook research through a specific point of view<sup>14</sup>.

The overall image of historical studies on primers published and used in early post-war period outlined during the workshop was very rich. According to the call for papers, the scholars who participated in the event could analyse different aspects of the workshop’s main topic: from the ‘actors’ (authors, illustrators, publishers, political authorities, teachers, learners and special target groups) to the ‘contents’ (teaching-learning methodologies, narrative of war, idea of citizenship spread, elements of continuity and discontinuity between war and post-war period); from ‘materiality and design’ (material problems related to the difficulties of that time, uses of old and new images in textbooks), to ‘processes’ (related to production, dissemination and use of primers).

The first day of workshop was opened by two Italian scholars. Alberto Barausse, from Molise University and Luciana Bellatalla, from Ferrara University.

Barausse’s paper (*Reading and writing in the Italian transition from the end of WWII to democracy*) explored primers from an educational policy point of view. He presented the situation of Italian schools after the Second

*through textbook research. The mission of the Georg Eckert Institute from the beginning up to the present day*, «History of Education & Children’s Literature», vol. 11, n. 1, 2016, pp. 481-502.

<sup>12</sup> *Workshop’s Call for paper*, p. 1.

<sup>13</sup> In this regard, interesting remarks may be found in the *General Introduction* and articles published in the monographic section of «History of Education & Children’s Literature» journal, vol. 9, n. 2, 2014, edited by Dorena Caroli and Alla Salnikova and devoted to the topic *Primers, culture(s) of childhood and educational models in Europe (16<sup>th</sup>-20<sup>th</sup> centuries)*.

<sup>14</sup> *Workshop’s Call for paper*, p. 2.

World War, analysing the pedagogical and political strategies carried out to implement the democratisation and defascistisation process of the country. He showed the changes and the steady elements in authors, publishers and circulation of textbooks production of the fascist period, recalling essential documents preserved at the Italian Central State Archive and analysing a very large sample of primers. The starting point for this intervention were the educational programmes for primary school published in 1945 by the Inter-Allied Commission, chaired by the American educator and education reformer Carleton Washburne. A special attention was paid to the work of the central and local commissions established for the evaluation of textbooks used in the 1945/46 school year. A very interesting point was the reconstruction of the post-war debate on the methods used to teach how to read and write, in which the global method distinguished itself in comparison to the traditional phono-syllabic method, despite the first one being identified with the fascist school. As regards the contents of primers, Barausse concluded that, from the first evidence, methodological pluralism was not accompanied, at least in this first post-conflict period, by a renewal of the educational models because, in most cases, once the explicit references to the totalitarian experience of fascism had been suppressed, patterns referring to the Nineteenth-century and early Twentieth century Italian school were found.

Bellatalla's report (*Renewed Nation: New School and New Primers? The Italian case in 1945*) summarised the general conclusions reached by some Italian textbook studies on the transition period from Mussolini dictatorship to the republican democracy (Ascenzi-Sani and Genovesi)<sup>15</sup>. She focused her attention on some representative primers (*sillabari*): *Serenity*, by Lucia Maggia (alias Hedda), published at the end of the First World War; fascist primers of 1931, published until 1945; finally, for the second post-war period, *Mother*, by Bruno Vaccari and Italo Orsi, a long-seller of the Italian republican primary school, and *Rain of stars*, by Aurora Carlini Venturino. The scholar showed examples taken from these texts to demonstrate that, notwithstanding the changes of political contexts and even if every reference to Mussolini and fascist totalitarianism had been removed, the post-war Italian school was not able to radically change its didactical tools and thus educational perspectives continued their path «in accordance more with the past organisation than with new ideals»<sup>16</sup>.

<sup>15</sup> In particular, she referred to her studies on reading textbooks and the work by Ascenzi and Sani on textbook revision processes carried out by the State Central Commission in the 1920s: L. Bellatalla, G. Genovesi, E. Marescotti (edd.), *La scuola nell'Italia unita. 150 anni di storia*, Padova, CLUEP, 2011; A. Ascenzi, R. Sani, *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 a Alessandro Melchiori (1923-1928)*, Milano, Vita & Pensiero, 2005.

<sup>16</sup> *Workshop's abstracts*, p. 3.

The speech delivered by Niki Sioki (*Learning to Read after WWII: the Greek Reading Primer in 1945*), from Nicosia University, Cyprus, offered a very peculiar point of view: that of the printing and design history as a tool to interpret the political, economic and cultural history of textbooks. After describing the difficult situation of Greece in 1945 (year of interval between the end of the Second World War and the beginning of a three-year civil war) and the immobility of Greek educational system in 1944-1945 (in which the influence of pre-war dictatorship established by Ionnis Metaxa was evident), Sioki focused her attention on the official state primer of 1945: *The little children*. The scholar examined the typographical and physical characteristics of this book, revealing that the primer does not present elements related to the struggling situation of the country and retraces the education model of pre-war primers. Such consideration, that also recalls the conclusions of Italian scholars, was exploited through the comparison with another Greek primer: *The little eagles*. In fact, Sioki explained that in this book, written in only 17 days and devoted to areas liberated from the axis occupation by the resistant organisation, war had a big role, in stark contrast with the official state primer of 1945.

Joanna Wojdon's report (*Between the Old and the New world in Poland: Marian Falski's Elementarz of 1945*), from University of Wroclaw, Poland, concerned the 1945 edition of the *Elementarz* by Polish educator and educational specialist Marian Falski (1881-1974). Wojdon presented the long history of this best-seller of Polish reading primers. In fact, the *Elementarz* was written in the pre-Second World War period and reached a very large popularity during the interwar period. After the Second World War the book was re-printed several times, also abroad, in those places (for e.g. Bari, Braunschweig, Hamburg, Paris) where Polish soldiers and citizens «tried to organise their life and education». In 1945, Falski started to organise the Polish Statistics Department, later renamed the Office of Research and Statistics of the Ministry of Education, and at the same time he worked on a new edition of his primer. Wojdon showed how 1945 represents a turning point in the history of Falski's primer, stressing the changes introduced by the author to adequate his book to the communist ideology.

Evita Wiecki, from Ludwig-Maximilians-Universität Munich, proposed an interesting paper on a minority language primer (*A Yiddish Primer in 1945? Teaching Materials for Jewish Children in Post-war Europe*). Wiecki presented the case study of Polish Yiddish primers. First of all, the scholar clarified that in 1945 there weren't any Yiddish primers in Poland. Until then, the survived Yiddish people had been living hidden in monasteries and churches and, in many cases, had lost a direct contact with their mother language and Yiddish identity. This situation was particularly evident for the children. Thus, the first primers came out between 1946 and 1948 and the first one had the symbolic title *The new life*. After defining Yiddish as «the only language for commemoration», Wiecki presented Yiddish primers as «the only source on

holocaust literature for children»<sup>17</sup>. She supported these assumptions through a panorama on the heterogeneous contents of Polish Yiddish primers, which accepted the challenge to deal with the terrible pages of recent past.

The first day of the workshop ended with a communication on a Project Proposal (*Reading Primers Published in 1945 in European Countries. An Annotated and Illustrated Bibliography*) presented by Wendelin Sroka, from RP-SIG. The core idea of the proposal was to create a useful tool to develop research on reading primers. Starting from the fact that, at present, there is a poor bibliography on primers, mainly focused on texts related to a single language, Sroka launched the project to build a transnational and evidence-based bibliography on primers published in European countries in and around 1945. The proposal was welcomed by a vivid debate on pros and contras of this project. We will certainly be informed on the development of this research hypothesis through the RP-SIG network.

The second day of the workshop was opened by two interventions devoted to Russian primers. One held by Vitaly Bezrogov from the Russian Academy of Education (Russia) and the other by Dorena Caroli from Macerata University (Italy).

Bezrogov's report (*Outside In: War Stopped and Continued – Differences and Discrepancies within Russian Primers and Basal Readers in the USSR in the Mid-1940s*) began with the assumption that war was part of Soviet childhood subculture but he also demonstrated that the post-war period reserved some surprises on this matter. He concentrated his research on the reading primers published in USSR in 1943-1948, applying a comparative study method, in which he combined: genetic criticism, contextual analysis and qualitative, inter-textual and thematic analysis. Bezrogov's intervention described the 'pantheon of war' proposed in Russian reading primers of mid-1940s. Soldiers, weapons, and airplanes fill the pages of post-war primers, as S.P. Redozubov's *Primers* of 1945-1946 prove very well. But not all the texts followed this pattern. Bezrogov showed how in the primers by Solov'eva the «peace therapy» was opposed to the «belligerence therapy». He demonstrated that in the primers published in the first post-war period we can find two parallel roads until 1949. This year is indicated by Bezrogov as the 'anno zero' of Russian textbook production, after which the militaristic spirit reveals a general decline<sup>18</sup>.

Caroli's presentation (*War and Post-war Primers in the Soviet Union: Printing, Revision of Old primers, and the Search for Renewal*) analysed the most widespread Russian primers in the time-span 1945-1952. First of

<sup>17</sup> The quotations derive from the notes taken during the speaker's presentation.

<sup>18</sup> Please note that the quotations related to this intervention are taken from the power point presentation displayed by the scholar during the workshop.



all, the scholar focused on the primers used and printed in 1945-46, namely those written by I.M. Golovin, A.V. Jankovskaja, S.P. Redozubov and A.I. Voskresenskaja.

She presented these texts pointing out similarities and differences on contents, images and linguistic approaches. In particular, on the latter aspect she gave the most original contribution to the workshop, showing the specific methods used in Russian primers to teach pupils reading and writing competences. In the last part of her talk, Caroli presented the situation of Russian primers in 1945-1952 from the point of view of the State Publishing House for Pedagogy, making use of relevant archival sources. In this perspective, she depicted, on one hand, the problems experienced in the post-war period to reprint and produce *ex novo* primers; and on the other, she described the state review processes of primers published in 1948, which had consequences and repercussions until 1952.

Verena Stürmer, from the University of Würzburg, Germany, delivered a speech (*Reading Primers in Germany 1945-1949 – a West-East German Comparison*) on German reading primers in the period between the end of the Second World War and the founding of the Federal Republic of Germany (FRG) and the German Democratic Republic (GDR). She underlined that 1945 was a significant turning point in German textbook history. During the following four years a different policy on textbook matter was applied, due to the diverse decisions taken by the occupying forces (United Kingdom, United States, Soviet Union and France), which controlled the German territory in this period. Stürmer demonstrated, through significant examples, that the socio-political context influenced the policies about primers in force in the four occupied zones. In the last part of her talk, the scholar proposed a comparison between East and West German reading primers, revealing that there were a lot more similarities than differences between the educational models recommended and approved in the two Germanies.

Mihai Stelian Rusu, from Babeş-Bolyai University, Romania, and Simona Szakács, from GEI, gave a paper on *Romanians into Socialists: Continuity and changes in primers for children and adults before, during, and after 1945*. The scholars began with the statement that primers are a «political tool» to spread a precise pedagogical project. On this basis, they proposed the consideration that fascist nationalism and communism were «pedagocracies and tutorial states», i.e. regimes that placed a paramount role onto education in the formation of the 'New Man'. They concentrated their analysis on 14 primers (out of which 9 for children and 3 for adults) used in the period 1938-1953, in order to comprehend the changes that occurred «before, during and after the war». Applying a thematic content analysis inspired by the constructivist-grounded theory on imagery and text, the scholars focused their attention on some specific content anchors: religion and nation, king symbol, war and work. Their study demonstrated that the real turning point for Romanian post-war primers was not 1945 but 1948, because from this year on, we find that «the old idols were

replaced with new ones», even if the framework of these idols largely remained the same<sup>19</sup>.

Kostantinos Giakoumis' report, from the University of New York, Albania, sprout from a suggestive title: *The Baptism of Fire: Preparing the New Albanian Socialist Man through 1946 reading Primers*. After describing the general political and educational framework of Albania in the Second World War period, Giakoumis focused his attention on the linguistic particularities of the Albanian territory. After a rich introduction, the scholar centred on the analysis of two primers published in 1946, justifying his choice with the impossibility to find the primer of 1945 announced by the Constituent Assembly of Albania. The scholar adopted a hermeneutical and iconological approach to the text. He explored the two sources through some specific interpretation keys (leaders, partisans, women, farmers, pioneers, foreign and domestic enemies), in order «to demonstrate how the communist regime engaged in legitimising its rule and fostering the new Albanian socialist man through reading primers for children»<sup>20</sup>.

Darko Stojanov, from the University of Saints Cyril and Methodiu, Macedonia, gave a paper on *Militarization through Education: the 1945 Primer from Socialist Macedonia*. His objective was to detect the strategies of militarisation applied to the first post-war primers, published in socialist Yugoslav Macedonia. He chose – as well as most Workshop speakers – a visual and textual approach to the source, accompanying it with a detailed historical-political background. In particular, Stojanov underlined the unique fact for which the 1945 Macedonian primer was approved the day after the establishment of the first Macedonian autonomous government and was the first example of official Macedonian language codification. The scholar demonstrated that the 1945 primer was part of a specific state educational programme, which aimed to create a direct connection between the school pupils and the future state soldiers.

The last presentation of the workshop was given by the spokesperson of RP-SIG network Wendelin Sroka. In his report (*Narratives of War in Slovenian Reading Primers, 1944-1946*), he began with the observation that war is a very strong topic in history textbooks, but that there are very few studies related to war in primers, and the most important has been written by Bezrogov<sup>21</sup>. He focused on the narratives of war in four Slovenian primers: two published in 1944 (*Dearest joy, oh where are you at home* and *We opened the school*), when

<sup>19</sup> Also these quotations derive from speakers' power point presentation displayed during the workshop.

<sup>20</sup> This quotation is one of the key statements argued by the scholar during his intervention at the workshop.

<sup>21</sup> See V. Bezrogov, *Consolidating childhood: children and war-page in Soviet an post-Soviet reading primers 1945-2008*, «History of education & children's literature», vol. 9, n. 2, 2014, pp. 151-164.

Slovenia was still occupied by Soviet forces, one in 1945 (*Beginners' book*) and the last one in 1946. Sroka showed how the narrative of war changed in Slovenian primers between 1944 and 1946, placing particular attention on the case of the 1945 primers. Published in the late Summer of 1945 with the approval of Slovenia's Ministry of Education, this primer written by Vinko Möderndorfer was received very enthusiastically at the beginning, not only for the good quality of its design and printing (hard cover, colour images, some of which displayed on a full page, innovative graphic solutions, etc.), but also for its efforts to illustrate Slovenia's recent history to pupils. But this success didn't last very long. In fact, Sroka explained that in the Autumn of 1945 «Slovenia's prime minister ordered the immediate ban of the book from classrooms», because of the strong representations of war, considered inadequate for children. Sroka concluded his intervention with the hope to develop a comparative analysis of narratives of war in primers published in and around 1945 in various Yugoslav republics, in order to shed new light on the many common features shared by the textbooks used in this particular geographic area.

The workshop was closed by a round table based on the question: *Historical Studies on Primers – What Can we Learn from an International Comparison?* The panel discussion was moderated by Eckhardt Fuchs (GEI), Joachim Scholz (BBF) and Joanna Wojdon (University of Wrocław). All the moderators agreed on two main final considerations. First, the year 1945 is not a turning point for all the countries' speakers and the «anno zero» in primers' post-war production can vary considerably in relation to the specific political-educational history of the country. Second, the war was a major protagonist of the post-war period. Many examples of pictures and texts showed by the Workshop's speakers concerned the war. The binomial 'war and textbooks' was indicated as the main route towards which the next developments of researches on primers should be oriented. In particular, Eckhardt Fuchs closed the sessions with the wish to improve the challenge launched at the Workshop: to develop an effective comparative examination between primers of different countries, based on a shared transnational research model<sup>22</sup>. The title of the workshop (*After the War – A New Beginning? A Comparative Examination of Reading Primers Published and Used in 1945 in Europe*), already announced such purpose and objective. We hope we will see the results of this 'work in progress' research perspective soon.

<sup>22</sup> For a first introduction to this study perspective, see: E. Fuchs, *Transnational Perspectives in Historical educational Research*, «Comparativ. Zeitschrift für Globalgeschichte und Vergleichende Gesellschaftsforschung», vol. 22, n. 1, 2012, pp. 7-14.



## «Una biografia collettiva degli educatori italiani degli ultimi due secoli»

Note a margine del seminario di studi su *Educatori e istituzioni scolastiche in Italia: percorsi, bilanci e prospettive d'indagine* (Potenza, 26 novembre 2015)

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«*A collective biography of Italian educators of the last two centuries*».

*Marginal notes about study seminar Educators and educational institutions in Italy: routes, balances and perspectives of investigation (Potenza, 26<sup>th</sup> November 2015).*

ABSTRACT: This paper, starting with the debate developed in the study seminar entitled *Educators and educational institutions in Italy: routes, balances and perspectives of investigation* (Potenza, 26<sup>th</sup> November 2015), aims to achieve a synthesis of the fruitful discussion started from important historians of education on the contribution to the historiography of the recent and prestigious publication *Biographical Dictionary of Education* (1800-2000), edited by Giorgio Chiosso and Roberto Sani, and fruit of the work of research groups working in different universities of Peninsula.

EET/TEE KEYWORDS: Dictionary; History of Education; Historical Research; Historiography; Italy, XIX<sup>th</sup>-XX<sup>th</sup> Centuries.

Il seminario di studi intorno a *Educatori e istituzioni scolastiche in Italia: percorsi, bilanci e prospettive d'indagine*, che ha visto la partecipazione di alcuni tra i più autorevoli esponenti italiani di Storia dell'Educazione riconosciuti a livello internazionale, è stato organizzato a Potenza dal Corso di Laurea in Scienze della Formazione Primaria del Dipartimento di Scienze Umane dell'Università degli Studi della Basilicata in collaborazione con la Deputazione Lucana di Storia Patria, in occasione della pubblicazione del *Dizionario Biografico dell'Educazione (1800-2000)* diretto da Giorgio Chiosso

e Roberto Sani<sup>1</sup>, frutto del lavoro di gruppi di ricerca operanti in diversi atenei della penisola.

L'opera ha consegnato gli esiti di una ricerca condotta attraverso approfondite indagini archivistiche ed una sistematica valorizzazione dei risultati della più recente storiografia di settore, venendo a colmare la carenza registratasi per il passato in Italia di rassegne biografiche organiche e aggiornate riguardanti il mondo di educatori, benefattori e filantropi, pedagogisti, uomini di scuola e scrittori per l'infanzia e per la gioventù. In modo particolare, accanto ai più noti pedagogisti, istitutori e personalità politiche, sono biografate le numerose e varieguate figure dei «professionisti dell'educazione e della scuola» dell'Otto e Novecento, che hanno guidato o partecipato ai processi di alfabetizzazione, di scolarizzazione di massa e di elevazione culturale e civile degli italiani a favore della costruzione dell'identità nazionale, restando spesso nell'ombra rispetto alla storia generale. Il valore specifico del *Dizionario Biografico dell'Educazione* (DBE) risiede, infatti, nel suo porsi quale utile strumento di ricerca e comprensione oltre che delle questioni squisitamente «educative», soprattutto dei processi di costruzione dell'identità storica e culturale delle diverse parti del Paese. Attraverso i suoi 2.345 profili biografici, il DBE fornisce in tal senso un supporto fondamentale alla lettura dell'evoluzione della storia educativa nazionale e locale, arricchendola di nuovi protagonisti, e aggiornando e completando i profili di quelli già esistenti. Tra questi, rientrano numerose personalità della Basilicata che hanno operato a vario titolo nel mondo dell'educazione e delle istituzioni scolastiche, rigorosamente ricostruite nei loro tratti grazie a certose ricerche negli uffici comunali e negli archivi storici, oltre che in biblioteche e fondi privati, ed attingendo ad una diversificata tipologia di fonti. La presentazione del DBE presso l'Università degli Studi della Basilicata, nel restituire alla cultura e alla storia lucana alcuni nuovi protagonisti, finora in parte trascurati, ha inteso approfondire in un più ampio seminario il ruolo «all'interno del mondo dell'educazione» di quelli già noti, appartenenti per convenzione al settore della politica, della letteratura e ad altri ambiti, tra i quali si ricordano Emanuele Gianturco, Saverio Nitti, Francesco Torraca, Giuseppe Latronico, Pietro Rosa, Francesco Di Sanza e molti altri.

Il seminario, principalmente, ha portato un significativo contributo alla riflessione storica sullo stato dell'arte dell'indagine storico-educativa italiana, favorendo allo stesso tempo il bilancio di una stagione lunga trent'anni di studi e ricerche ed uno sguardo in prospettiva dei suoi sviluppi futuri.

<sup>1</sup> G. Chiosso, R. Sani (edd.), *DBE: Dizionario biografico dell'educazione (1800-2000)*, 2 voll., Milano, Bibliografica, 2013.

*Un seminario sullo stato dell'arte e sulle prospettive della ricerca storico-educativa in Italia*

L'Aula Magna del Polo di Scienze Umane dell'Università della Basilicata al Rione Francioso di Potenza ha ospitato, il 26 novembre 2015, il partecipato evento seminariale *Educatori e istituzioni scolastiche in Italia. Percorsi, bilanci e prospettive d'indagine* sulla scia della pubblicazione del *Dizionario Biografico dell'Educazione*. Il contributo degli esperti intervenuti ha orientato i lavori intorno ad uno dei più fecondi versanti abbracciati dalla recente storiografia scolastico-educativa, che sta conoscendo negli ultimi decenni l'espansione ed il rinnovamento dei confini e degli spazi d'indagine del settore. La Magnifica Rettrice, la prof.ssa Aurelia Sole, il Direttore del Dipartimento di Scienze Umane, il prof. Paolo Augusto Masullo e i professori dell'Ateneo lucano hanno accolto i colleghi delle Università di Macerata e del Molise – nell'ordine di intervento: il prof. Roberto Sani, la prof.ssa Anna Ascenzi, il prof. Alberto Barausse – introducendo i lavori e offrendo il loro personale contributo di riflessione intorno alla tematica posta al centro del seminario.

Claudio De Luca, coordinatore del corso di laurea in Scienze della Formazione Primaria ha introdotto quindi la discussione sulle tante personalità appartenenti al mondo dell'educazione che hanno saputo contribuire allo sviluppo della stessa disciplina. Oltre alla conoscenza di tali figure spesso lasciate nell'ombra, il *Dizionario Biografico dell'Educazione* ha avuto il merito di aprire innovativi percorsi di ricerca e d'indagine volti alla ricostruzione della traccia, in parte ancora celata, congiungente l'ambito locale e quello nazionale delle pratiche e della storia educativa in Italia, a partire dalla sua Unità.

Antonio Lerra, promotore con Michela D'Alessio dell'iniziativa anche in qualità di Presidente della Deputazione Lucana di Storia Patria, ha accennato proprio al potente riverbero prodotto da un'opera che propone attraverso le oltre 2000 voci biografate di personalità del mondo dell'educazione, la riflessione sul nesso esistente tra le teorie, le pratiche didattico-metodologiche poste in campo dagli educatori e i luoghi della formazione e dell'istruzione in cui gli stessi hanno operato, offrendo notevoli spunti per affrontare indagini interessate ai processi educativi conosciuti in concreto nelle tante storie di scuola riconducibili agli sviluppi del contesto unitario. Tra i luoghi peculiari della formazione nel Mezzogiorno d'Italia si pongono i seminari diocesani ed altri istituti privati, sulla cui mappatura si sta lavorando e la cui vita interna va sottratta al rischio del facile oblio. Oltre pertanto al richiamo alle figure degli educatori, ai luoghi ed ai diversi itinerari formativi, Lerra si è soffermato sull'esigenza di favorire la conoscenza di esperienze originali e significative che hanno attraversato ad esempio gli anni Cinquanta del Novecento in Basilicata, tra cui la scuola nuova di Roccanova in cui operava il maestro Arturo Arcomano e il movimento di cooperazione educativa che introdusse le prime tecniche innovative di Freinet ed i risultati di quegli interventi. Su questo percorso condiviso d'indagine si

muoverà la rete tra Università, Deputazione e istituzioni scolastiche regionali, per la realizzazione di un progetto mirato nel settore di cultura regionale.

A conferma di queste ipotesi di lavoro, ha fatto seguito l'intervento puntuale della dott.ssa Patrizia Minardi – Dirigente dell'Ufficio Sistemi Culturali e Turistici, oltre che della Cooperazione Internazionale della Regione Basilicata – sull'imprescindibilità di dialogo e relazione continua tra le istituzioni per veicolare i comuni obiettivi di indagine, secondo un orientamento più complesso che riesca a promuovere le attività culturali in stretto legame con le vocazioni del territorio, e quindi per la tutela e valorizzazione del patrimonio regionale. In particolare, la Minardi ha ricordato che la nuova legge 27 di cui si è dotata la regione Basilicata ha puntato l'attenzione sul riconoscimento innanzitutto del valore sociale della cultura e ha concluso rilevando che il contributo della regione «è quello di recepire dall'Università l'impostazione con cui lavora per portarla in capo sia alla legge cultura sul valore sociale delle relazioni, sia in capo al fondo sociale europeo che è il fondo che dovrebbe riuscire a garantire la formazione di educatori in chiave complessa». Al dibattito è intervenuto quindi il Direttore Masullo nella sua veste di coordinatore della discussione. Dopo aver sottolineato l'importanza dell'occasione seminariale per agevolare una riflessione storica che non solo rivolga lo sguardo al passato ma con capacità di lettura del presente e orientata al futuro, egli ha specificato con forza quanto occorra che «la cultura sia il faro conduttore del nostro agire» e introdotto l'intervento di Roberto Sani, già rettore dell'Università di Macerata.

*Il Dizionario Biografico dell'Educazione e gli studi storico-educativi dell'ultimo trentennio*

Nell'affrontare il discorso intorno alle trasformazioni vissute dalla storia della pedagogia italiana, che vede il DBE mettere a frutto una pratica innovativa di ricerca, il contributo di Roberto Sani, che lo ha diretto insieme a Giorgio Chiosso, è stato incentrato sulla chiara analisi dei mutamenti che hanno riguardato gli approcci e gli studi affrontati in ambito educativo. L'illustre studioso, nonché attuale direttore della rivista internazionale «History of Education and Children's Literature», ha introdotto il suo discorso condividendo le osservazioni di Lerra intorno non solo ai risultati raggiunti dal DBE, quant'anche sulle prospettive future aperte dallo stesso.

Sani ha quindi ripercorso la «storia» del DBE quale frutto di un PRIN, un Progetto di Ricerca di Interesse Nazionale, che ha visto il coinvolgimento di oltre 100 studiosi e ricercatori appartenenti a circa 15 atenei nazionali, raccogliendo un primo risultato, nella inversione della tendenza di ricerca di segno individualistico, a lunga tramandata dalla tradizione italiana. Il DBE è da collocarsi all'interno del definitivo superamento della tradizionale impostazione



idealistica di matrice gentiliana degli studi storico-pedagogici, temporalmente in una stagione che ha visto il tramonto di una visione della storia della pedagogia intesa sostanzialmente come filosofia dell'educazione. Di qui la necessaria sottolineatura di come al superamento della tradizione gentiliana abbia fatto seguito una nuova e più laica sensibilità storiografica e culturale che ha caratterizzato oltre trent'anni del nostro Paese. In tale direzione la storia della pedagogia è venuta ad ampliarsi verso la storia dell'educazione e la storia della scuola, della letteratura per l'infanzia e nuovi settori specifici di attenzione. Sani ha poi evidenziato anche come la stessa Università della Basilicata si sia inserita a pieno titolo nel gruppo di ricerca che ha operato all'interno di questa nuova impostazione di studio e lavoro, svolgendo un ruolo di primo piano. A pieno titolo, pertanto, il *Dizionario*, con i suoi oltre 2000 profili, rappresenta «una sorta di biografia collettiva degli educatori italiani degli ultimi due secoli» nella quale figurano non solo i nomi ben noti di pedagogisti di fama nazionale e internazionale, ma si collocano anche nuovi professionisti della storia della scuola. Riflettendo sui processi di alfabetizzazione e di scolarizzazione di massa volti alla costruzione di un'identità nazionale oltre che alla crescente espansione dei livelli di istruzione fin dagli ultimi decenni dell'Ottocento, l'interesse dovrebbe ricondursi alla conoscenza delle personalità che hanno fattivamente lavorato per garantire simili traguardi: la pubblicazione del DBE ripercorre, in una maniera assolutamente inconsueta, la storia della scuola e dell'educazione arricchendosi dell'esperienza di profili e di figure che hanno modo di «dialogare», attraverso le pagine del *Dizionario*, e prospettare alla collettività i reali percorsi affrontati a livello locale, rispetto alle dinamiche nazionali, a garanzia di uno sviluppo formativo del cittadino italiano. In sintonia con i processi di scolarizzazione di massa si è sviluppato, peraltro, un importante settore dell'editoria scolastica ed educativa che ha accompagnato tali processi fornendo i mezzi rivolti alla formazione dell'infanzia e della gioventù.

Sani ha quindi proseguito il suo intervento sugli ultimi decenni di evoluzione del settore storico-educativo, ribadendo come proprio tra Otto e Novecento sia emersa nel nostro Paese «un ceto intellettuale di operatori dell'alfabeto e della educazione»: vale a dire, un ceto intellettuale che ha caratteristiche peculiari rispetto alle tradizionali élites accademiche e letterarie che lo avevano preceduto, ma anche rispetto allo stesso notabilato del censo, caratteristico in prevalenza delle zone centrali e meridionali della penisola. Sani è poi passato quindi ad esaminare le caratteristiche di questo precipuo ceto intellettuale, sorto sulle ceneri di quello del censo e sviluppatosi solo facendo propri i titoli di studio. Di qui l'attenzione alle «concrete dinamiche formative e culturali che hanno contrassegnato la crescita e l'evoluzione degli ultimi due secoli della società italiana». Occorre dunque prendere coscienza dell'importanza dell'esistenza, del ruolo e della funzione di tale ceto intellettuale, che non è più quello dei cattedratici universitari o del notabilato, ma presenta caratteristiche sue proprie ed alla cui attività va ricondotto lo sviluppo portante delle vicende nazionali.

Volendo inseguire la parabola del nostro Paese, è necessario quindi mettere a fuoco il ruolo svolto ad esempio dagli insegnanti di ogni ordine e grado, un ruolo troppo spesso finora ignorato o sottovalutato, in ordine alla crescita civile dei luoghi anche più remoti dal centro di vita nazionale. Tra le numerose figure dei professionisti dell'educazione attivi negli anni a cavaliere tra il XIX e XX secolo, sono da collocare i fondatori e gli animatori di istituzioni assistenziali scolastiche per l'infanzia e la gioventù, i promotori e animatori degli istituti delle scuole speciali per l'educazione dei disabili, gli autori dei libri di testo e della manualistica scolastica, i direttori e i redattori dei periodici scolastici e delle riviste magistrali, gli scrittori e gli illustratori dei libri per l'infanzia e la gioventù, con il fitto reticolo di editori specializzati per la scuola e l'educazione, insieme ai fautori delle riforme scolastiche ma anche del rinnovamento dei metodi di insegnamento e delle pratiche didattiche, le tante Maria Montessori che hanno operato nelle piccole realtà locali.

Malgrado il DBE non abbia colto l'obiettivo di vedere la luce nel 2011, essendo stato pubblicato nel 2013, l'idea iniziale di assicurare con la sua uscita il forte richiamo al contributo dato dalla scuola e dalle pratiche educative a quel processo di unificazione e assimilazione di una identità nazionale, al centro delle celebrazioni dei 150 anni dall'unità d'Italia, non è certo venuto meno. Ciò non limita di certo l'incidenza reale del ruolo, su cui Sani ha fatto luce, di tutto quel personale che ha operato nel mondo dell'educazione, di tutte quelle figure che hanno incarnato una vera classe dirigente. Ecco pertanto come non tanto il *Dizionario*, quanto piuttosto le ricerche indotte dalla sua uscita possano aprire la strada ad una utile riflessione sulla classe dirigente, in una aggiornata messa a fuoco dei suoi tratti e del suo ruolo, non sufficientemente acquisiti dalla storiografia del settore.

A ben vedere, appare questo il passaggio più significativo e proficuo dell'intervento di Sani che, ribadendo l'evidenza della nascita e dell'operato di una classe dirigente disimpegnata dall'esclusivo campo politico, imprenditoriale o amministrativo, ne individua la specificità in ambito educativo, nel quale ha spesso innalzato baluardi significativi di resistenza, specie alle ideologie ed ai totalitarismi, grazie alla costruzione dei soggetti ed al loro acculturamento. Il *Dizionario*, quindi consente «una rilettura della nostra storia unitaria che pone al centro gli sforzi e l'impegno comune di tanti uomini e donne per la crescita del Paese e per lo sviluppo collettivo». In sintesi, Sani ha sottolineato con fermezza quanto l'educazione e la scuola siano stati il principale fattore della coesione nazionale e della crescita civile della nostra comunità nazionale. In tal senso la ricchezza dei volti emergenti dal *Dizionario* aiuta sicuramente a cogliere in maniera più concreta ed aderente alla realtà le strade attraverso cui i processi educativi scolastici abbiano alimentato la crescita e la modernizzazione della società italiana. Il grande merito del *Dizionario* è stato quello di aver restituito alla memoria collettiva una lunga galleria di profili biografici, non solo verso l'avanzamento degli studi in tale settore, ma ancor più nel senso di

una ricomposizione di una classe di educatori, vale cioè a dire nella «centralità di una presenza molecolare di uomini e donne» animati da istanze religiose, ideologie, convinzioni politiche, orientamenti pedagogici talora anche opposti, ma accomunati da una grande passione per il loro lavoro e dalla dedizione alla causa del futuro. Sono stati loro a rendere possibili processi vitali della storia italiana: l'alfabetizzazione e la scolarizzazione di massa. L'ultima riflessione ribadisce quanta parte tali personalità educative abbiano ricoperto nella formazione, veicolazione ed accrescimento del sentimento nazionale ed in anni più recenti della stessa idea della cittadinanza democratica. Sani consegna quindi la chiave di lettura sostanziale che la ricerca ed opere come il *Dizionario* inducono nella società, vale a dire la sensibile risposta all'esigenza indifferibile di capire la nostra storia e trattenerne la memoria.

*La letteratura per l'infanzia tra passato e presente: percorsi e prospettive di ricerca*

Anna Ascenzi ha spiegato invece in apertura come la sua relazione fosse volta ad illustrare in quale maniera e con quali esiti la storia della letteratura per l'infanzia e la gioventù, insieme al suo universo di fenomeni, emerga nel *Dizionario Biografico dell'Educazione*, comprovando le diverse letture possibili all'interno dei due ponderosi volumi, considerati dalla stessa studiosa punto di arrivo delle ricerche finora condotte e nuovo punto di partenze per indagini future. Lo spazio riservato dal DBE alla disciplina ed ai profili biografici è quello non solo dei protagonisti e degli scrittori rilevanti, ma soprattutto dei tanti autori per lo più erroneamente relegati tra i "minori" di libri per l'infanzia e la gioventù, spesso ignorati, senz'altro trascurati dagli storici dell'educazione. All'interno del DBE, pertanto, è possibile cogliere tutta la centralità che la letteratura per l'infanzia è venuta assumendo negli ultimi decenni «quale fonte e strumento per la più ampia e incisiva comprensione dei più generali processi culturali e formativi che hanno caratterizzato il nostro paese negli ultimi due secoli». Secondo la Ascenzi il punto di vista degli storici della letteratura per l'infanzia, le loro analisi e ricostruzioni, sono diventati fonti e strumenti per la più ampia e incisiva comprensione dei generali processi culturali formativi che hanno contribuito alla realizzazione dell'ambizioso obiettivo – per dirla con le parole di Chiosso e Sani – di «restituire alla memoria collettiva un'immagine articolata e il più possibile esaustiva delle varieguate esperienze educative nazionali, regionali e locali scolastiche intervenute tra Ottocento e Novecento presso le biografie degli uomini e delle donne che ne sono stati artefici e protagonisti». L'ambito della letteratura per l'infanzia, in particolare, assurge ad uno *status* di rilievo all'interno di una rinnovata epistemologia della storia della pedagogia e dell'educazione perché ne definisce fonti, strumenti

di indagine, spunti di riflessione per orientare la ricerca verso aspetti finora inesplorati: in una ricomprensione tra le figure biografate dal DBE, degli stessi autori di libri di testo e di manuali scolastici, oltre che di figure particolarmente importanti ai fini di una storia organica della disciplina, quella, accanto agli scrittori per l'infanzia, anche degli illustratori e dei traduttori, che sono stati a lungo considerati di basso lignaggio estetico e letterario. La stessa Ascenzi ha proseguito segnalando all'attenzione generale – in un superamento lungo una parabola più che decennale di sforzi tesi alla delimitazione dei contorni epistemologici e dei contenuti d'indagine della disciplina – alcune acquisizioni e traiettorie nuove di ricerca, d'impronta propriamente storiografica. Per un verso, le analisi condotte hanno fatto della letteratura per l'infanzia lo strumento principale per risalire alla formazione di un immaginario collettivo intorno all'infanzia ed alla famiglia, nel periodo a cavallo tra il XIX e il XX secolo: ad oggi, si tratta di percorsi a cui la ricerca è obbligata per poter ricostruire fedelmente, e in modo più complesso, il processo di evoluzione formativo e culturale dell'Italia unitaria. Per l'altro verso, la Ascenzi ha indicato alcuni utili nuovi itinerari che si affacciano alla ricerca della letteratura per l'infanzia, ribadendo – nei temi cari alle sue corde di studiosa – lo sforzo principale di storicizzare lo sguardo ai modelli educativi ed alle visioni dell'infanzia, a partire dalle opere e dagli autori per i piccoli lettori e la gioventù, sganciandosi da preoccupazioni di natura esclusivamente estetica oppure interessati alla sola analisi testuale ed all'approfondimento del congegno narrativo dei testi stessi. Alcuni aspetti finora poco considerati apporteranno nuove conoscenze e contributi allo sviluppo della disciplina, a cominciare dall'attenzione principale da indirizzare alla circolazione ed alla fruizione reale dei libri per l'infanzia e la gioventù, che merita indagare attraverso l'analisi delle tirature, delle riedizioni e ristampe; all'analisi delle collane specializzate e più in generale dei progetti culturali ed editoriali sottesi alle più significative raccolte di testi per l'infanzia e la gioventù; ai libri di testo e la manualistica scolastica, trascurata come oggetto di indagine fino ad ora, facendo riferimento ai tipi di lettura, agli abbecedari, ai sussidiari delle scuole elementari popolari, un ambito approfondito negli ultimi anni ma che presenta ancora vaste lacune da colmare. La Ascenzi ha pertanto additato con incisività tutto il ricco potenziale d'indagine contenuto nei percorsi rintracciabili tra le pagine del DBE, e ne ha comunicato coerentemente le possibilità di sviluppo. I nuovi filoni d'indagine attendono di essere frequentati con esiti innovativi ed originali, a riprova delle spinte positive innescate dallo studio delle 303 figure di esponenti principali della letteratura per l'infanzia, biografate nel *Dizionario*.

### *Il ruolo degli educatori nella storia dei processi educativi*

Alberto Barausse ha rinnovato l'urgente impegno di riflessione sul ruolo degli educatori, nel processo di costruzione delle identità nazionali ma anche nei processi di formazione di specifiche identità professionali. Occorre ricostruire la storia delle realtà scolastiche locali in favore di una ben più articolata interpretazione dei congegni pedagogici nazionali e internazionali, focalizzando l'interesse sui molteplici volti di insegnanti e operatori dell'ambito educativo, delle differenti strade da loro percorse e degli obiettivi raggiunti. Barausse ha sottolineato come il DBE possa essere considerato il «segnale di una operazione che mancava da decenni nella storia della cultura educativa italiana, come ripresa di un prodotto che riuscisse a restituire come in uno specchio l'identità complessiva e molteplice del mondo degli educatori che ha fatto la storia e continua a fare la storia dei processi formativi educativi del nostro Paese».

Lo stesso Barausse ha ripreso quindi le argomentazioni espresse da Sani ed Ascenzi sugli sviluppi della storia dell'educazione, nel passaggio dalla matrice di storia di idee a quella di storia sociale e culturale. Sul filo della prospettiva storiografica maturata negli ultimi cinquant'anni, Barausse ha sottolineato, in particolare, l'imprescindibilità della ricerca locale per aiutare a far emergere la complessità di un mondo nazionale, ma anche in una prospettiva internazionale della storia dell'educazione, nonché il compito della ricerca locale, che ciascuno conduce nell'ambito della propria università, in risposta all'esigenza volta ad approfondire la conoscenza sia di itinerari scolastici, formativi ed educativi peculiari di singole parti del territorio, sia del ruolo dei protagonisti che hanno accompagnato lo sviluppo di questi ultimi due secoli. L'insistenza pertanto è stata rivolta al ruolo detenuto dal mondo degli educatori in alcuni passaggi fondamentali della nostra storia: a partire dalla sfera politico istituzionale, passando per la sfera degli amministratori scolastici, passando oggi per quella dei dirigenti scolastici, direttori didattici, le figure dei provveditori, le figure degli stessi educatori citati prima nei contesti di educazione professionale. Si tratta di un mosaico di figure e profili che, a livello locale, hanno tentato di interpretare e di realizzare in modo distinto un progetto pedagogico indirizzato dal potere centrale. Le strade sono state diverse e differenziate, ed è questa la bellezza della ricerca a livello territoriale, che nel tempo ha inevitabilmente obbligato a ricercare i percorsi di istruzione e formazione, i contenuti da dare alle culture scolastiche ed educative molto precie e rispondenti a dei bisogni emergenti a livello locale. Lo studioso ha concluso il proprio intervento affermando che «Il nostro sogno è quello di pensare ad una storia d'Italia dell'educazione affinché ogni regione possa produrre un suo volume come espressione e risultato di ricerche che, se condotte con rigore scientifico e con un'attenzione metodologica alla riscoperta delle fonti, conducano alla realizzazione di un percorso che davvero può arricchirci nel campo delle competenze della storia dell'educazione di cui, oggi, sentiamo enormemente il bisogno».

*I profili culturali degli educatori lucani*

Michela D'Alessio, sottolineando la pluralità di letture ed «attraversamenti» del *Dizionario*, punto di partenza per una riflessione a più ampio raggio sui bilanci, i percorsi e le prospettive d'indagine della ricerca storico-educativa, ha tenuto a sottolineare la ricchezza degli esiti dell'incontro in terra lucana e si è posta l'obiettivo di veicolare nel ravvicinato futuro le indicazioni emerse dal seminario di studi. La D'Alessio si è soffermata poi sull'esigenza di dare voce all'esperienza e ai contributi offerti dagli educatori operanti nello specifico panorama locale, richiamando alcune delle personalità lucane che hanno agito nel campo dell'istruzione. Si tratta di personalità cui il *Dizionario* ha il merito di aver restituito il profilo a tutto tondo di educatori, malgrado, nella maggior parte dei casi, venissero per il passato ritenuti appartenenti in modo esclusivo ad altri ambiti. Da Emanuele Gianturco, Ministro della Pubblica istruzione a Giuseppe Aliani, scrittore per l'infanzia originario di Miglionico; da Pietro Rosa, professore del Liceo Classico "Quinto Orazio Flacco" di Potenza, a Francesco Torraca, quale Direttore Generale Della Pubblica Istruzione, fino a Domiziano Viola, Direttore Regionale dell'Opera regionale contro l'analfabetismo negli anni di attività dell'ANIMI, l'Associazione Nazionale per gli Interessi del Mezzogiorno d'Italia in Basilicata, dal 1921 al 1928; a personalità che sono state espressione dell'associazionismo magistrale locale, tra cui Francesco di Sanza e Pietro Faudella. In conclusione la D'Alessio ha palesato uno spiccato interesse per la ricostruzione storico-politica del ruolo e dell'impegno della dirigenza scolastica locale: ispettori e direttori scolastici, principalmente, espressione di quelle professionalità che hanno influito nelle amministrazioni periferiche nel porsi quale «cerniera» tra la dimensione locale e quella centrale dell'istruzione, protagonisti cui restituire nuova luce, nell'ottica di cogliere tutta la complessità ed articolazione dei processi di costruzione dell'identità educativa e sociale dell'«Italia delle Italie».

# Children's Literature and Play. La conferenza internazionale *The Child and the Book* (Breslavia, 19-21 maggio 2016)

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*Children's Literature and Play. The international conference The Child and the Book* (Wroclaw, May 19 to 21 2016).

**ABSTRACT:** This article aims to provide a report of twelfth edition of the international conference *The Child and the Book* (Wroclaw, May 19 to 21 2016), dedicated to the relationship between play and children's literature. The conference, which was attended by scholars from around the world, was also the occasion to commemorate the centenary of the birth of prof. Jerzy Cieslikowski (1916-1977), one of the finest scholars of Polish literature for children, that long was involved in the dimension of the game in children's books.

**EET/TEE KEYWORDS:** Children's Literature; Play; Conference; Poland; XX<sup>th</sup>-XXI<sup>th</sup> Centuries.

Dal 19 al 21 maggio si è tenuta a Breslavia, città Capitale Europea della Cultura 2016, la dodicesima edizione della conferenza internazionale *The Child and the Book* dedicata al rapporto fra gioco e letteratura per l'infanzia. Questa conferenza, inaugurata nel 2004 presso l'Università di Roehampton in Gran Bretagna ed ospitata nel corso di suoi dodici anni di storia da alcuni fra i più attivi centri di ricerca sulla letteratura per l'infanzia nel mondo, attira ogni anno ricercatori e studenti PhD provenienti da tutto il mondo per la possibilità di presentare, in un clima di amichevole confronto, le proprie ricerche e dibatterle alla presenza di affermati studiosi che ne arricchiscono il successivo lavoro di approfondimento e di scavo scientifico.

La conferenza, organizzata dalla Facoltà di Filologia dell'Università di Breslavia e coordinata da un attivo gruppo di studiosi polacchi di letteratura

per l'infanzia (Dorota Michułka, Justyna Deszcz-Tryhubczak, Katarzyna Biernacka-Licznar, Elżbieta Stolarska-Jamróż, Barbara Kalla, Natalia Paprocka e Bogumiła Staniów), è stata anche l'occasione per ricordare il centenario della nascita del professor Jerzy Cieślowski (1916-1977), uno tra i più fini studiosi polacchi di letteratura per l'infanzia, che a lungo si è occupato della dimensione del gioco nei libri per ragazzi. Tra le sue pubblicazioni, merita una segnalazione il suo lavoro *The Great Play: Children's Folklore* pubblicato postumo nel 1985.

La conferenza ha visto il coinvolgimento di oltre un centinaio di studiosi provenienti da numerosissimi paesi dell'Europa occidentale e orientale (Belgio, Croazia, Finlandia, Francia, Gran Bretagna, Germania, Grecia, Irlanda, Islanda, Italia, Norvegia, Polonia, Portogallo, Spagna, Svezia, Ucraina, Ungheria) e del Nord-America (Stati Uniti e Canada). Vi erano anche rappresentanze più ristrette, ma assai significative anche da paesi quali Israele, Brasile, Australia e Cina.

Il calendario prevedeva una serie fittissima di presentazioni, incontri e discussioni: 9 sessioni plenarie condotte da studiosi di caratura mondiale, 4 tavole rotonde e 27 sessioni parallele.

Le sessioni plenarie, che hanno inaugurato i lavori della conferenza e che si sono tenute presso l'Aula Leopoldina dell'Università di Breslavia, il più suggestivo esempio di arte barocca in Polonia, sono state affidate a due storici della letteratura per l'infanzia: Kim Reynolds e Hans-Heino Ewers. La studiosa inglese ha aperto i lavori con una relazione centrata sull'evoluzione della rappresentazione dei corpi dei bambini in diversi libri inglesi della prima metà del ventesimo secolo. In questo periodo si è verificata nel regno britannico una nuova attenzione per i bisogni e la salute nell'infanzia: le nuove politiche sociali per la salute, architettoniche e pedagogiche miravano a formare un nuovo modello di cittadino funzionale alla costruzione di una nuova Gran Bretagna. Nei decenni precedenti, salvo alcuni casi eccellenti di orfani vittoriani, i libri per ragazzi tendevano a rappresentare bambini bianchi della classe media, i cui corpi erano essenzialmente sani, senza alcun problema di salute. L'analisi della Reynolds di alcuni libri pubblicati fra gli anni Venti e Quaranta del Novecento mostra, invece, il significativo cambio di rappresentazione della società britannica, con l'inclusione delle classi sociali più povere ed indigenti, ed evidenzia la nuova attenzione che scrittori e illustratori per bambini hanno iniziato a manifestare rispetto all'esigenza, anche nei bambini più poveri ed emarginati, di un corpo sano ed efficiente da far crescere attraverso un ambiente e una dieta alimentare adeguati, l'esercizio fisico e il gioco.

Lo studioso tedesco Hans-Heino Ewers si è soffermato, invece, sull'evoluzione della dimensione ludica e sul ruolo attribuito al gioco nella storia della letteratura per l'infanzia nel periodo storico tra l'Illuminismo e il Romanticismo. A partire dal XVIII secolo, i pedagogisti "illuminati", animati da nuovi intenti educativi, rilanciano il valore del gioco e del giocattolo, ma cercano di inquadralo entro una nuova cornice didattica con l'obiettivo di funzionalizzarlo alle esigenze di apprendimento del bambino. Il gioco del bambino inizia così a perdere il suo



alone di innocenza: gli stessi studiosi, inoltre, criticano i moderni giocattoli per bambini, fabbricati nella città tedesca di Norimberga, e avviano un feroce antagonismo tra la pedagogia moderna e l'industria del giocattolo, tuttora perdurante. La letteratura per l'infanzia diventa, così, uno strumento fondamentale per propagandare nuovi giochi didattici: ad esempio giochi linguistici, versi nonsense, ma anche giochi meccanici, bambole e animali di peluche. Questi ultimi, in particolare, entrano di prepotenza come nuovo motivo popolare nella letteratura per l'infanzia dell'Ottocento.

Anche le sessioni plenarie dedicate agli aspetti più letterari (Björn Sundmark, Junko Yokota, Krystyna Zabawa, Marek Oziewicz), digitali (William Teale) o di ricerca qualitativa sul campo con bambini (Lee Galda & Tony Pellegrini) si sono rivelate fruttuose. Assai affascinante, ad esempio, si è rivelata l'analisi critica sull'utilizzo giocoso delle mappe negli albi illustrati, capaci non solo di rappresentare luoghi geografici assai lontani dall'immaginario infantile, ma anche di offrire, oltre le barriere temporali, linguistiche e culturali, uno strumento specialissimo per raccontare paesaggi interiori presenti nella vita quotidiana di un bambino o di una bambina, (Björn Sundmark). Fonte di stimoli e di dibattito, è stata anche la relazione di William Teale, che si è soffermato sull'esigenza di riflettere e di ripensare l'utilizzo di una certa terminologia negli ambienti della narrazione digitale: in luogo, del termine *e-picturebooks*, lo studioso dell'Università di Illinois ha proposto di parlare di *e-stories*, mettendo in evidenza così la fondamentale importanza anche nei contesti narrativi digitali di sviluppare (o di non sviluppare, nonostante l'indubbia travolgente esperienza ludica) l'alfabetizzazione letteraria, come nel caso di *Petting Zoo* di Christoph Niemann.

Le tavole rotonde sono state un altro momento importante di questa edizione di *The Child and the Book* perché hanno impegnato in dibattiti, talvolta molto accessi, studiosi, che da tempo e con competenza si occupano di aspetti specifici come ad esempio la relazione fra letteratura e gioco esaminata in contesti determinati (dal primo periodo sovietico al post-sovietico) nella duplice funzione di testo letterario e oggetto ludico o la portata storica e la significatività, anche da un punto di vista di ricerca folcloristica, degli studi di Jerzy Cieślowski nella letteratura per l'infanzia. La tavola rotonda *Giocare con l'autore, giocare con il lettore: il ruolo cruciale della traduzione nella letteratura per l'infanzia*, condotta da Monica Wozniak, professore associato all'Università di Roma «La Sapienza» ed esperta di teoria della traduzione, è stata un appuntamento molto affollato perché ha fatto produttivamente dialogare studiosi e traduttori quali Vanessa Joosen, Elwira Pieciul-Karmińska, Bogusława Sochańska e Jan Van Coillie intorno agli orientamenti teorici e stilistici contemporanei nella traduzione letteraria per l'infanzia sia dei classici (es. la raccolta di fiabe dei Grimm o di Andersen), che nella poesia o negli albi illustrati. Visionaria e altrettanto feconda anche la tavola rotonda *Nonsense letterario e gioco*, animata dalla studiosa islandese Olga Holownia, che da tempo indaga il valore

e la funzione del *nonsense* nella letteratura per l'infanzia: durante l'incontro è stato ribadita la centralità di questo binomio letterario non solo in autori classici quali Lewis Carroll o Edward Lear, ma anche in opere contemporanee che trascendono il tradizionale contesto anglofono con esempi tratti dalla poesia indiana o finnica, da canzoni svedesi, da traduzioni visive polacche e soprattutto, dalle straordinarie metamorfosi grafiche dell'enciclopedia visiva più strana del mondo: l'italianissimo *Codex Seraphinianus*.

Tuttavia, ad essere percepite come il vero fulcro di questa conferenza sono state le ventisette sessioni parallele, animate da tre o quattro presentazioni ricche e differenziate di *case study*, ricognizioni e analisi storiche, esplorazioni visive, ricerche sul campo. Esse, infatti, sono state capaci di restituire tanto ai giovani ricercatori quanto agli studiosi esperti, che si sono trattieneuti per l'intera durata della conferenza, spostandosi di sessione in sessione a seconda dei rispettivi interessi, la vivacità, la ricchezza pluridisciplinare e la capacità degli studi internazionali contemporanei sulla letteratura per l'infanzia di intercettare e di presidiare la complessità dei contesti sociali, culturali ed educativi in cui i bambini e le bambine di oggi crescono e maturano. Tante le tematiche che hanno arricchito queste tre giornate di lavoro: l'apporto dell'immaginario ludico infantile nella storia della letteratura per l'infanzia, la rappresentazione del gioco negli albi illustrati, nei libri gioco e nei libri educativi, gioco e biblioterapia, la lettura come passatempo ludico, i giochi linguistici e altri meccanismi ludico-letterari, la lettura e la letteratura come gioco nei nuovi ambienti digitali, l'utilizzo ludico del limite e del confine sia nei testi che nei paratesti, il rapporto fra identità e gioco nella narrativa per ragazzi e giovani adulti, negli albi illustrati e nei *graphic novel*, le contaminazioni dell'opera *Homo Ludens* di Johan Huizinga nella narrativa per ragazzi contemporanea, la relazione ludica con gli animali e i mostri. Anche la sessione presieduta dalla scrivente, dedicata alla contraddittoria relazione fra gioco e pericolo nei libri per ragazzi è stata rivelatrice di quanto questa disciplina sia ancora capace di nutrire amplissimi ed inesplorati spazi di studio e di ricerca, non solo nei libri per ragazzi contemporanei (come la singolare carrellata di alfabetieri e di abbecedari visivi presentata durante l'incontro è stata in grado di evidenziare), ma anche nello studio dei classici. Esempio, da questo punto di vista, i contenuti e gli strumenti di analisi utilizzati da una studiosa norvegese per esplorare la rappresentazione della funzione bipolare del gioco in uno dei capolavori italiani della letteratura per l'infanzia, ovvero *Pinocchio*.

La conferenza *The Child and the Book*, che si è conclusa in questa edizione del 2016 con un bilancio assolutamente positivo, sta già mettendo le basi per l'organizzazione della tredicesima edizione che si terrà dal 6 all'8 aprile 2017 presso l'Università di Valencia in Spagna. Il tema prescelto per l'edizione 2017 sarà *Interdisciplinary Links between the Arts and Children's Literature*.

# Espacios y Patrimonio Histórico-Educativo / Spaces and Historical-Educational Heritage

Balance, suggestions and perspectives from the VII  
Jornadas Científicas of the SEPHE and the V Simposio  
Iberoamericano, Historia, Educación, Patrimonio of  
the RIDPHE (San Sebastián, June 28 - July 1, 2016)

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**ABSTRACT:** From June 29 until July 1, 2016 for the very first time a joint conference, combining the VII Jornadas Científicas de la SEPHE (*Sociedad Española para el Estudio del Patrimonio Histórico-Educativo*) and the V Simposio de la Rede Iberoamericano para a Investigação e a Difusão do Patrimônio Histórico Educativo (RIDPHE), was held in Donostia-San Sebastián (Basque Country, Spain). Focused on the topic of the «school space and educational heritage», the conference aimed to present the theme of the space intended as a kaleidoscopic object, made of multiple places and full of people and objects, and where children, pupils, young and adult people had educational experiences and spent their lives.

EET/TEE KEYWORDS: History of Education; Historical Research; School Museum; Heritage Education; Conference; Spain; XIX<sup>th</sup>-XXI<sup>th</sup> Centuries.

In the days June 29-July 1, 2016 the Miramar Palace of the city of Donostia-San Sebastián hosted the *VII Jornadas Científicas* of the SEPHE and the *V Simposio Iberoamericano: Historia, Educación, Patrimonio Educativo*.

The international conference «Spaces and Historical-Educational Heritage» was organized by the *Garaian* Group for Historical and Comparative Research in Education of the Universidad del País Vasco/Euskal Herriko Unibertsitatea (UPV/EHU), together with the *Sociedad Española para el Estudio del Patrimonio Histórico-Educativo* (SEPHE) and the RIDPHE (*Rede Iberoamericana para a Investigação e a Difusão do Patrimônio Histórico Educativo*).

### 1. *Organization and collaborations*

In October 2014, the *Spanish Society for the Research on Historical-Educational Heritage* (SEPHE) entrusted the arrangement of its biennial conference to the Museum of Education and to the *Garaian* Group for Historical and Comparative Research in education of the University of the Basque Country/Euskal Herriko Unibertsitatea. In the same period the opportunity arose to establish contact also with the *Iberian-American Network for Research and Dissemination of Historical-Educational Heritage* (RIDPHE). As a consequence the organizers and Societies decided to hold a joint event that brought together, for the very first time, the *VII Jornadas Científicas* of SEPHE and the *V Simposio Iberoamericano* of RIDPHE. The event was held in the Miramar Palace of the city of Donostia-San Sebastián (Basque Country, Spain) from June 29 to July 1, 2016, and was dedicated to the theme *Spaces and Historical-Educational Heritage*. The event was arranged by the aforementioned organizations with the support, at different levels, of the Vice-Chancellor of the Gipuzkoa Campus, the Department of Theory and History of Education, and the Summer Courses Foundation of the University of the Basque Country, together with the Ministry of Economy and Competitiveness (project n. EDU2013-44129-P), the State University of Campinas (Brazil), the Lenbur Foundation (Legazpi, Basque Country) and the *Education, Culture and Society* Research and Training Unit (UFI 11/54) of the University of the Basque Country. This event was also the occasion for the official opening of the new Museum of Education of the University, which was founded in 2014 by the University Governing Council, and currently managed and coordinated by the

*Garaian* Group<sup>1</sup>. This new exhibition space is expected to act as a fundamental point of reference for preserving and studying the historical-educational heritage of the Basque Nation, and for promoting its richness and value for future generations.

## 2. *Attendees and provenance*

This meeting was the largest of the events organized by SEPHE and RIDPHE. In fact 143 scholars registered and, regarding their provenance, as expected the majority came from Spain (64% of the people registered), with Brazil being the second country (16.1%), and Italy the third (8,4%), followed by France (4,2%), Argentina, Chile and Portugal (2,1%), and finally México and Dominican Republic (0,7%) – as showed in the following scheme:

### *Registration of attendees by country of provenance*

	Number	Percentage
Argentina	3	2,1
Brazil	23	16,1
Chile	3	2,1
Spain	91	63,6
France	6	4,2
Italy	12	8,4
México	1	0,7
Portugal	3	2,1
Dominican Republic	1	0,7
Total	143	100

## 3. *Keynote presentations*

Before addressing the content of the sessions of the event, and in order to offer a clear framework for the contributions to be submitted in each area, the organizers deemed it important to assign three keynote presentations to provide consistency to the aim of this meeting. These speeches would explore three different aspects of the conference's main topic: the opening speech, as a theoretical contribution, had to focus on the concept of school space seen from the perspective of historical-educational heritage (Antonio Viñao, University

<sup>1</sup> Cfr. the website of the Museum: <<http://www.ehu.es/museoeducacion>> (last accessed: August 8<sup>th</sup>, 2016).

of Murcia, Spain); the second, to outline the scenario of museum collections in universities (Marta Lourenço, Universidade de Lisboa, Portugal); the third, to shed new light on heritage education in museums (Marta Brunelli, University of Macerata, Italy). Through these presentations, the purpose of the organizers was to focus on three areas that undoubtedly reflect the main objectives of the Societies involved: to promote research and knowledge in the field of the historical-educational heritage, and to foster heritage education in school museums, especially of university nature.

#### 4. *Topics and communications*

The response to the call for papers for the Symposium could not have been more favourable and, although some sessions received more contributions than others, the high number of received proposals revealed the level of interest in the suggested theme, and reflected the current state of the research being carried out in this specific area of historical-educational studies.

##### 4.1. *School spaces*

The symposium was organized into five sessions, the first of which was entitled *School Spaces*. In this first session the expected contributions would focus on the fact that school activities take place in privileged spaces such as schools and other training and educational centres. Therefore, communications had to address the educational space intended as a micro-universe in which educational policies as well as the curriculum, school discipline, the role of teacher, the school functions, and finally the process itself of turning children into pupils, take concrete shape. All school practices happen in spatial contexts that are full of objects, agents and teaching materials and, moreover, are purposefully designed with specific architectural proposals such as: school yards, classrooms, school buildings, boarding structures, and so on. This session aimed to emphasize the materiality of school spaces and in particular how they were used, according to certain educational practices. The richness and variety of educational heritage in such spaces clearly emerges, and consequently this section received the largest number of contributions (28), which can be classified into three sub-categories: educational centres (13), school architecture (8), and finally material objects, educational practices and uses of space (8).

#### 4.2. *Ludic spaces*

The second session can be identified with what is usually referred to, in the educational field, as “informal education”, and as such it deals with the theme of *Ludic Spaces*. Complementary to the central role that the school space has in the life of children as well as of adolescents and adults, these areas also form part of the pervasive dimension of education. So ludic spaces can be found in parks and gardens, cinemas, theatres, recreational and sports areas, thematic parks etc. Here we can find both various material objects (toys) and immaterial (such as songs and dances, for example), which all make up the playful side of education. This session received nine communications, which indicates that the themes proposed are still unexplored fields for researchers in the historical-educational area.

#### 4.3. *Mirrored spaces*

The third session, entitled *Mirrored Spaces*, aimed to focus not so much on the school reality or the educational spaces in themselves, but rather on the way in which schools and spaces are usually represented. When looking at the “mirrors” (e.g. photographic images, historical documentaries, films and so on) reflecting school spaces with teachers, students and school materials, we can analyse how these have been depicted in the collective imagery. In short, the session proposed to work on the image reflected by the space beyond its own materiality. With this aim, the “new” primary sources that are being discovered by historical research, and which form part of the historical-educational heritage itself, prove to be essential to favouring this approach. In this session thirteen contributions were received, which fundamentally refer to the space described in films (4), in photography (4) and other narrative media (5).

#### 4.4. *Recounted spaces*

As a complement to the previous session, the fourth focused on the *Recounted Spaces*. Each space, in fact, becomes more significant when there are voices that fill it with content and meanings, imagery, changes and innovative uses. Oral testimonies, autobiographies, stories and other individual narratives give new voice to the real actors of school spaces such as teachers, architects, educationalists, school inspectors as well as ex-alumni with their childhood memories, reflecting the most varied aspects of life and education. The largest number of contributions pertained to teachers’ voices (10), confirming their relevance within the school space; while other educational narratives (4) and school notebooks (5) showed complementary viewpoints of educational

practices. The inclusion of notebooks can be explained not so much for their value as sources (which has been largely demonstrated up to now by the historical research), but rather in order to explore the genesis of the narration of school learning and experience.

#### 4.5. *Museums and historical-educational heritage*

Finally, the fifth session was dedicated to *Museums and Historical-Educational Heritage*, which was very successful since it received twenty-one communications, structured into three sub-categories: museums' educational practices (9), collections, museums and educational heritage (5), and finally documentation centres and archives (7). The session proved to be very coherent since the received contributions reflected the same approach of previous editions of the conferences of both SEPHE and RIDPHE, in which the main focus was represented by school museums, school museology, historical-educational heritage and heritage education. On the other hand, the session confirmed how the museums and centres of historical-educational heritage are currently experiencing a season of change and development worldwide, as evidenced by the many initiatives illustrated, which all share the aim of promoting knowledge and a widespread awareness of this specific heritage through projects realized not only by scholars and educators, but very often carried out together with students, teachers and citizens.

#### 5. *Balance and perspectives*

As mentioned, the received communications amounted to a total of ninety-one and arrived from Latin America as well as from several European countries. All the communications and keynote presentations have been published in the book *Espacios y Patrimonio Histórico-Educativo* (edited by Paulí Dávila and Luis M<sup>a</sup> Naya), which is now freely available in pdf format in the Institutional Repository of the University of the Basque Country<sup>2</sup>. This high number of submissions greatly exceeded the organizers' expectations, since the proposed theme was unusual in the field of studies on historical-educational heritage where the most commonly addressed issues regard museological and/or museographic themes, or particular aspects of school

<sup>2</sup> P. Dávila, L.M<sup>a</sup> Naya (edd.), *Espacios y patrimonio histórico-educativo*, Donostia, Erein, 2016. The pdf of the proceedings can be freely downloaded from the URL: <<https://addi.ehu.es/handle/10810/18512>>. An additional access is available in the portal for the dissemination of Hispanic scientific production *Dialnet*: <<https://dialnet.unirioja.es/servlet/libro?codigo=655034>> (last accessed August, 8th, 2016).



objects and specific educational collections. In conclusion, it can be said that this event accomplished two important goals. On the one hand, it presented the concept of school and educational spaces as a «multifaceted object» – as defined by Antonio Viñao – that can be analysed from different perspectives, and whose heuristic productivity has been confirmed by the many and wide-ranging communications presented during the symposium. On the other hand, the first experience of holding a joint meeting between SEPHE and RIDPHE has represented an important step towards internationalization, both by promoting a closer cooperation and integration of the two societies, and by encouraging increasing involvement of colleagues from other European countries. This first experience has allowed the sharing of practices, the exchanging of ideas and the promotion of possible collaborations that, in the future, could result in joint research projects and, consequently, foster scientific progress in our discipline.



*International  
Bibliography*



**Bibliografia  
Internazionale**



# International Bibliography of History of Education and Children's Literature (2015)\*

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## *Introduction*

The present overview *International Bibliography of the history of education and children's literature* about the year 2015 is the fourth of a serie, which has been published in 2013, 2014 and 2015 on the international journal «History of Education & Children's Literature» and concerned the five years period 2010-2014; it was followed by the publication of three volumes about the same period. This specialised bibliographical overview includes researches and studies about the history of education edited around the world (articles published in journals, monographs, collections of essays, proceedings and textbooks).

In order to build the present work tool, addressed in particular to the scholars of history of education and of children's literature, it was necessary to go systematically through an outstanding quantity of national and international specialized publishers' catalogues (historical studies, social and human sciences,

\* The introduction is the result of the joint work of the two authors. Luigiaurelio Pomante has collected the first part of the titles about scientific Journals; Dorena Caroli has collected and settled the second part of the titles about Monographs and Miscellaneous, and also all the titles from Eastern-Europe.

educational sciences), as well as through the catalogues of almost 400 high specialized scientific reviews published in different countries of the world.

This research is necessarily a *work in progress*, because of the difficulties, which are sometimes insurmountable, and intervening to every legitimate will of completeness and exhaustiveness in the searching of data retrieval. Notwithstanding the growing boost produced by *internet* and by *social media* to the globalization process, indeed, not always the *web sites* of publishers and of the scientific reviews (such as of those of the Universities and of the public and private research Centers) provide updated and exhaustive information (catalogues, bibliographical report, tables of contents of the issues etc.). It's because of the difficulties encountered during the acquisition of precise data and sure information about the scientific production of this field concerning some particular countries and, consequently, the real necessity to have a broad net of collaborators in loco, that is a net of researches and scholars specialized in this field, who are available to offer a systematic information to «History of Education & Children's Literature» of the most recent and relevant publications edited in their countries and, if necessary, to complete the information, sometime fragmentary, thanks to a distance research through internet.

To the building and to the enhancement of a similar net of collaborators, we are willing, to consecrate our energies in the next years, pointing at the possibility to make of this bibliographical overview a reliable tool, constantly updated, exploitable by all the scholars, and most of all capable to present in his complexity and variety the wide-ranging investigation of the international scientific production in the field of the history of education and children's literature.

To the building of this *International Bibliography* concerning the year 2015, a number of other experts and researchers from all over the world have given their valuable contribution, in addition to colleagues of the scientific board of the Journal «History of Education & Children's Literature».

In this regard, the editors would like to sincerely thank for their collaboration: Vitaly G. Bezrogov (Russian Academy of Education, Moscow, Russia), Ariane Calderari (Centre de Documentation et de Recherche Pestalozzi d'Yverdon, France), Craig Campbell (University of Sydney, Australia), Peter Carrier (redaction of the review «Journal of Educational Media, Memory and Society», Germany), Jonathan Doney (University of Exeter, United Kingdom), Antonio Castillo Gómez (Universidad de Alcalá, Spain), Anne-Marie Chartier and Renaud D'Enfert (INRP – Service d'Histoire de l'Éducation, France), Maria Elena Del Valle de Villalba (Universidad Metropolitana, Caracas Venezuela), Inés Dussel (Facultad Latinoamericana de Ciencias Sociales, Argentina), Agustín Escolano Benito (Universidad de Valladolid, Centro Internacional de la Cultura Escolar, Spain), Aslam Fataar (Stellenbosch University, South Africa), Décio Gatti (Faculdade de Educação, Universidade Federal de Uberlândia, Brazil), Hui Haifeng (Huazhong University of Science and Technology,

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### *Abbreviations and Acronyms*

ACAD = «Academia» (China)  
 ACADEM = «Academic Monthly» (China)  
 ACEX = «Academic Exploration» (China)  
 ACTAB = «Acta Baltica Historiae et Philosophiae Scientiarum» (Lettland)  
 ACTAC = «Acta Academiae Beregsasiensis» (Hungary)  
 AEHJ = «American Educational History Journal» (USA)  
 AHEA = «Historia de la Educación Argentina. Anuario» (Argentina)  
 AHT = «Acta Historica Tallinnensia» (Estonia)  
 AHUS = «Acta Humanitarica Universitatis Saulensis» (Lettland)

- AJER = «American Journal of Educational Research» (USA)  
AK = «Makarenko» (Russia)  
AKAD = «Akadeemia» (Estonia)  
ALMAM = «Alma Mater. Vestnik vysshej shkoly» (Russia)  
ANDO = «Anthology of Dongyue» (China)  
ANLI = «Anhui Literature» (China)  
ANSO = «Análise Social» (Portugal)  
ANYPED = «Anyanyelv-pedagógia» (Hungary)  
AOB = «Administrator Obrazovanya» (Russia)  
AOE = «Antitetrada of education» (Greece)  
APMA = «Appreciation of Masterpieces» (China)  
APOP = «Aktual'nye Problemy Obshego i Professional'nogo Obrazovanya» (Russia)  
APV = «Acta Paedagogica Vilnensia» (Lithuania)  
ART = «Art criticism» (China)  
ASE = «Annali di Storia dell'Educazione e delle Istituzioni scolastiche» (Italy)  
ASESOA = «Assessment of Southeastern Asia» (China)  
ASNSP = «Annali della Scuola Normale Superiore di Pisa. Classe di Lettere e Filosofia» (Italy)  
ASUI = «Annali di Storia delle Università Italiane» (Italy)  
AUFEL = «Autonómia és felelősség: neveléstudományi folyóirat» (Hungary)  
AURP = «Aula. Revista de Pedagogía de la Universidad de Salamanca» (Spain)  
BALSPI = «Balgarsko spisanie za obrazovanie» (Bulgaria)  
BASMC = «Bollettino dell'Archivio per la storia del movimento sociale cattolico in Italia» (Italy)  
BCP = «Le Bulletin du Centre de documentation et de recherche Pestalozzi» (Switzerland)  
BERJ = «British Educational Research Journal» (United Kingdom)  
BHR = «Bibliothèque d'Humanisme et Renaissance» (France)  
BIBCO = «Bibliotheca Comeniana» (Hungary)  
BIS = «Biologiya v Shkole» (Russia)  
BJES = «Baltic Journal of European Studies» (Lettland)  
BJPS = «British Journal of Political Science» (Great Britain)  
BORP = «Bordón. Revista de Pedagogía» (Spain)  
BPHM = «Bulletin der PolnischenHistorischen Mission» (Germany)  
BS = «Brixia Sacra» (Italy)  
BSMIJB = «Das Bücherschloss. Mitteilungen aus der Internationalen Jugendbibliothek» (Germany)  
BSSE = «Buletini Shkencor. Shkencat e Edukimit» (Albania)  
BSSV = «Bollettino della Società degli Studi Valdesi» (Italy)  
BSZO = «B'lgarsko spisanie za obrazovanie» (Bulgaria)  
CABAS = «Cabas. Revista digital sobre el Patrimonio Histórico Educativo» (Spain)  
CAE = «Carrefours de l'Éducation» (France)



- CAE = «Chinese Adult Education» (China)  
CBMH = «Canadian Bulletin of Medical History» (Canada)  
CBR = «China Book Review» (China)  
CCL = «China Comparative Literature» (China)  
CEIS = «Cennosti. Smyśli» (Russia)  
CEL = «Ceļš» (Lettland)  
CFMAE = «The Changing Face of Music and Art Education» (Estonia)  
CHE = «Cadernos de História da Educação» (Brazil)  
CHEBRO = «Chelovek i obrazovanie» (Russia)  
CHIBO = «China Book Review» (China)  
CHINE = «China Editor» (China)  
CHINPI = «China Newspaper Industry» (China)  
CHIPRE = «China Press» (China)  
CHIPU = «China Publishing» (China)  
CHIT = «Chinese Teaching» (China)  
CHR = «The Catholic Historical Review» (USA)  
CHSCC = «Church History: Studies in Christianity and Culture» (UK)  
CIAN = «CIAN. Revista de Historia de las Universidades» (Spain)  
CJES = «Cypriot Journal of Educational Sciences» (Cyprus)  
CLR = «Chinese Literature Research» (China)  
CMLRS = «Chinese Modern Literature Research Series» (China)  
COED = «Contemporary Education Dialogue» (India)  
CON = «Contemporanea. Rivista di Storia dell'800 e del '900» (Italy)  
CONCHI = «Construction of Chinese Course» (China)  
CONFOLI = «Contemporary Foreign Literature» (China)  
CP = «Cuestiones Pedagógicas. Revista de Ciencias de la educación» (Spain)  
CT = «Chinese Teaching» (China)  
CUACHI = «Cuadernos Chilenos de Historia de la Educación» (Chile)  
DDSZ = «Die Deutsche Schule. Zeitschrift für Erziehungswissenschaft, Bildungspolitik und pädagogische Praxis» (Germany)  
DEBA = «Debates in Arts» (China)  
DEF = «Defektologiya» (Russia)  
DNV = «Dukhovno-Nravstvennoe Vospitanie» (Russia)  
DO = «Docencia» (Chile)  
DOS = «Doshkolnik» (Russia)  
DOSBRAV = «Doshkol'noe obrazovanie i vospitanie» (Russia)  
DOV = «Doshkolnoe Vospitanie» (Russia)  
DPRS = «Dimensioni e problemi della ricerca storica» (Italy)  
DRL = «Drama Literature» (China)  
DSA = «Detsky Sad ot A do Ya» (Russia)  
DSS = «Direktor Sel'skoj Shkoly» (Russia)  
EASF = «Eastern Forum» (China)  
ECOPOL = «Economic and Political Weekly» (India)

- ED = «Educación XX1» (Spain)  
EDC = «Educatio» (Hungary)  
EDU = «Educação» (Brazil)  
EDUPE = «Educação e pesquisa: Revista da Universidade de São Paulo» (Brazil)  
EDUR = «Educar em Revista» (Brazil)  
EERE = «Elementary Education Research» (China)  
EERJ = «European Educational Research Journal» (United Kingdom)  
EF = «Editor's Friends» (China)  
EFIL = «Educação e Filosofia» (Brazil)  
EFP = «El Futuro del Pasado» (Spain)  
EH = «Educació i Història. Revista d'Història de l'Educació» (Spain)  
EHA = «Eesti Haridusteaduste Ajakiri/Estonian Journal of Education»  
EI = «Education Inquiry» (Sweden)  
EJ = «Editor's Journal» (China)  
EJE = «European Journal of Education» (USA)  
EKO = «Ekologicheskoe Obrazovanie: do Shkoly, v Shkole, vne Shkoly»  
(Russia)  
EKS = «Ekonomika v Shkole» (Russia)  
ELKT = «Eesti Lastekirjanduse Keskuse toimetised» (Estonia)  
EMSTT = «Elementary and Middle School Teacher Training» (China)  
ENCONTE = «Encounters in Theory and History of Education» (Canada)  
EOZ = «Evrazyskoe Ozherel'e» (Russia)  
ES = «Educational Studies. A Journal of the American Educational Studies  
Association» (United Kingdom)  
ESAF = «Eastern and Southern Asian Forum» (China)  
ESE = «ESE. Estudios Sobre Educación» (Spain)  
ESTHU = «Estudios Humanísticos. História» (Spain)  
ESXX = «Estudos do Século XX» (Portugal)  
ETE = «Espacio, Tiempo y Educacion» (Spain)  
EUROBUL = «EUROCLIO Bulletin» (Greece)  
EVEOK = «Neveléstudomány: oktatás – kutatás – innováció» (Hungary)  
EXE = «Exedra. Revista Científica (on line)» (Portugal)  
EXPL = «Exploration» (China)  
EYD = «Eydos. Al'manakh teorii ta istorii istorichnoy nauki» (UKraine)  
FE = «Foro de Educación» (Spain)  
FEMSE = «Foreign Elementary and Middle School Education» (China)  
FILI = «Film Literature» (China)  
FILOBRA = «Filosofya obrazovanya» (Russia)  
FILOL = «Filologos» (Greece)  
FIS = «Fizika v Shkole» (Russia)  
FKVT = «Fizicheskaya Kul'tura: Vospitanie, Obrazovanie, Trenirovka» (Russia)  
FLT = «Foreign Literature Trends» (China)  
FOB = «Filosofya Obrazovanya» (Russia)

- FOLET = «Foreign Language Teaching» (China)
- FOLFOLT = «Foreign Language and Foreign Language Teaching» (China)
- FOLST = «Foreign Language Studies» (China)
- FORDUL = «Fordulópont» (Hungary)
- FOREC = «Forum of Education and Culture» (China)
- FORELT = «Foreign Language Teaching Theory and Practice» (China)
- FORER = «Forum of Education and Research» (China)
- FORET = «Forum of Education and Teaching» (China)
- FORME = «Forum of Modern Education» (China)
- FORT = «Forum of Teaching» (China)
- FORWOC = «Forum of World Chinese Literature» (China)
- FS = «Filosofija. Sociologija» (Lettland)
- GEES = «Geografya i Ekologya v Shkole XXI Veka» (Russia)
- GEMR = «Guizhou Ethnic Minority Research» (China)
- GEN = «Genesis. Rivista della società italiana delle storiche» (Italia)
- GERUN = «Gerundium» (Hungary)
- GES = «Geografya v Shkole» (Russia)
- GLOCAL = «Glocale. Rivista molisana di storia e di scienze sociali» (Italy)
- GODUZ = «Godishnik na Universitet "Prof. Dr. Asen Zlatarov"» (Bulgaria)
- GSS = «Guangxi Social Science» (China)
- GSU = «Godishnik na Sofijski Universitet "St. Kliment Ohridski"» (Bulgaria)
- GUISS = «Guizhou Social Science» (China)
- GWU = «Geschichte in Wissenschaft und Unterricht» (Germany)
- GYER = «Gyermeknevelés» (Hungary)
- HAR = «Haridus» (Estonia)
- HE = «Histoire de l'Éducation» (France)
- HECL = «History of Education & Children's Literature» (Italy)
- HEILED = «Heilongjiang Education» (China)
- HEILSCI = «Heilongjiang Sci-Tech Info» (China)
- HEJ = «History of Education. Journal of the History of Education Society» (United Kingdom)
- HEQ = «History of Education Quarterly» (USA)
- HER = «History of Education Review. The official Journal of the Australian & New Zealand History of Education Society» (Australia)
- HERE = «History of Education Researcher» (United Kingdom)
- HERI = «Historia de la Educación. Revista Interuniversitaria» (Spain)
- HES = «Higher Education Studies» (Canada)
- HF = «The History of the Family. An International Quarterly» (Ireland)
- HIQDE = «História: Questões & Debates», Curitiba (Brazil)
- HISTCA = «Historia Caribe» (Colombia)
- HISTI = «History of education issues» (Greece)
- HISTOJ = «História Hoje. Revista eletrônica de História e Ensino. O Ensino de História e o Tempo Presente» (Brazil)

- HM = «Historia Magistra» (Italy)  
HME = «Historia y memoria de la educación» (Spain)  
HP = «History of Psychiatry» (California-Usa)  
HS = «Historia Scholastica» (Czech Republic)  
HSE = «Historical Studies in Education/Revue d'Histoire de l'Éducation» (Canada)  
HU = «History of Universities» (United Kingdom)  
IC = «Italia Contemporanea» (Italy)  
IJED = «International Journal of Educational Development» (Hong Kong, China)  
IJHE = «Bildungsgeschichte. International Journal for the Historiography of Education» (Switzerland)  
IJHME = «International Journal for the History of Mathematics Education» (USA)  
IL = «Interlitteraria» (Estonia)  
INJS = «Inostrannye Yazyki v Shkole» (Russia)  
INNOB = «Innovacii v obrazovanii» (Russia)  
INT = «Intellect» (China)  
INTEP = «International and European Politics» (Greece)  
INTER = «Interacções» (Portugal)  
IOL = «Innovaccii v Obrazovanii i Lingvistike» (Russia)  
IPAV = «Istoriko-Pedagogichesky Almanakh VLADI» (Russia)  
IPZ = «Istoriko-Pedagogichesky Zhurnal» (Russia)  
IRAO = «Izvestya Rossyskoj Akademii Obrazovanya» (Russia)  
IRCL = «International Research in Children's Literature» (Canada)  
IRGPU = «Izvestya Rossyskogo Gosudarstvennogo Pedagogicheskogo Universiteta im. A.I. Gercena» (Russia)  
IRHED = «International Review of History Education» (Greece)  
ISBRA = «Iskusstvo i obrazovanie» (Russia)  
ISK = «Iskolakultura Könyvek» (Hungary)  
ISPESE = «Istorya pedagogiki segodnya» (Russia)  
ISSRA = «Issledovatel'skaya rabota shkol'nikov» (Russia)  
ISTOBA = «Istoricheskoe badeshte» (Bulgaria)  
ISTPAM = Istorya i istoricheskaya pamiat (Russia)  
ISTPE = «Istoriko-pedagogichesky Ezhegodnik» (Russia)  
IT = «δια-κειμενα - inter-textes» (Greece)  
IZYUFED = «Izvestya Yuzhnogo Federal'nogo universiteta: Pedagogicheskie nauki» (Russia)  
JCES = «Journal of Contemporary European Studies» (United Kingdom/Usa)  
JCOU = «Journal of Chinese Oceanic University (Social Science Edition)» (China)  
JEAH = «Journal of Educational Administration & History» (United Kingdom)  
JEF = «Journal of Ethnology and Folkloristics» (Estonia)  
JEMMS = «Journal of Educational Media, Memory, and Society» (Germany)  
JFH = «Journal of Family History. Studies in Family, Kinship, Gender, and Demography» (Canada)  
JHB = «Jahrbuchfür Historische Bildungsforschung» (Germany)

- JHCY = «Journal of the History of Children and Youth» (USA)  
JHE = «The Journal of Higher Education» (USA)  
JIANER = «Jiangsu Education Research» (China)  
JIANSS = «Jiangxi Social Science» (China)  
JJE = «Journal of Jewish Education» (USA)  
JOAUT = «Journal of Anhui University of Technology» (China)  
JOCHIMU = «Journal of China Marine University» (China)  
JOCHU = «Journal of Chengdu University» (China)  
JOCHUD = «Journal of China Education» (China)  
JOCUT = «Journal of Changchun University of Technology» (China)  
JOED = «Journal of Editing» (China)  
JOEDU = «Journal of Education» (China)  
JOFUN = «Journal of Fujian Normal University» (Social Science Edition) (China)  
JOGUCOT = «Journal of Guangdong College of Technology» (China)  
JOGUNOS = «Journal of Guilin Normal School» (China)  
JOGUPS = «Journal of Guilin Professional School» (China)  
JOHABS = «Journal of Hainan Broadcast School» (China)  
JOHEUT = «Journal of Henan University of Technology» (China)  
JOHUCOT = «Journal of Hunan College of Technology» (China)  
JOHUNI = «Journal of Hunan University (Education Science Edition)» (China)  
JOHUSENS = «Journal of Hubei Second Normal School» (China)  
JOINMONU = «Journal of Inner Mongolia Normal University» (China)  
JOJCE = «Journal of Jilin College of Education» (China)  
JOJIAN = «Journal of Jiangsu Normal University (Social Science Edition)» (China)  
JOJUN = «Journal of Jimei University» (China)  
JOKUC = «Journal of Kunming College» (China)  
JOLACE = «Journal of Lanzhou College of Education» (China)  
JOLINS = «Journal of Liuzhou Normal School» (China)  
JOLINU = «Journal of Liaoning Normal University» (China)  
JOLUNS = «Journal of Luoyang Normal School» (China)  
JOMU = «Journal of Mudanjiang University» (China)  
JONNU = «Journal of Nanjing Normal University» (China)  
JOPLA = «Journal of PLA Foreign Language School» (China)  
JOSE = «Journal of Scientific Education» (China)  
JOSHANU = «Journal of Shanxi Normal University» (China)  
JOSIPROS = «Journal of Sichuan Professional School» (China)  
JOUBENU = «Journal of Hebei Normal University» (China)  
JOUCS = «Journal of Curriculum Studies» (Greece)  
JOUHUFINS = «Journal of Hunan First Normal School» (China)  
JOUJICOT = «Journal of Jinchu College of Technology» (China)  
JOWU = «Journal of Wuhan University» (China)  
JOXIBRU = «Journal of Xiamen Broadcast University» (China)  
JOXIPS = «Journal of Xiangfan Professional School» (China)

- JOYU = «Journal of Yangtze University» (China)  
 JOZHEN «Journal of Zhejiang Normal University (Social Science Edition)» (China)  
 JOZUNS = «Journal of Zunyi Normal School» (China)  
 JPFLS = «Journal of PLA Foreign Languages School» (China)  
 JPH = «Journal of Pacific History» (UK)  
 JPHE = «Journal of Philosophy & History of Education» (USA)  
 JSCNU = «Journal of Southern China Normal University» (China)  
 JSE = «The Journal of Special Education» (United Kingdom)  
 JSSE = «Journal of Social Science Education» (Germany)  
 JU = «Jahrbuch für Universitätsgeschichte» (Germany)  
 JZNU = «Journal of Zhejiang Normal University (Social Science Edition)» (China)  
 KAF = «Kafedra» (Russia)  
 KAINN = «Kachestvo. Innovacii. Obrazovanie» (Russia)  
 KATPED = «Katolikus pedagógia» (Hungary)  
 KEK = «Kultúra és közösség» (Hungary)  
 KEPGY = «Képzés és gyakorlat» (Hungary)  
 KEPGYA = «Képzés és gyakorlat/Training & Practice» (Hungary)  
 KJHEDU = «Korean Journal of the History of Education» (Korea)  
 KJLF = «Kinder- und Jugendliteraturforschung» (Germany)  
 KK = «Keel ja Kirjandus» (Estonia)  
 KLIO = «Klio. Zhurnal dlya uchenykh» (Russia)  
 KONNEV = «Könyv és nevelés» (Hungary)  
 KOR = «Korrekcionnaya Pedagogika» (Russia)  
 KSOP = «Kachestvo Sovremennogo Obrazovanya: Problemy i Putyakh Reshenya» (Russia)  
 KULBA = «Különleges bánásmód» (Hungary)  
 KULT = «Kultúrne dejiny» (Slovakia)  
 KUOBRA = «Kul'tura, Obrazovanie, Nauka» (Russia)  
 LANT = «Lantai World» (China)  
 LIB-LIB = «Libri & Liberi: časopis za istraživanje dječje književnosti i kulture» (Croatia)  
 LIBS = «Library Science» (China)  
 LIN = «Linhas» (Brasil)  
 LITC = «Literary Circle» (China)  
 LITED = «Literary Education» (China)  
 LITS = «Literatura v Shkole» (Russia)  
 LL = «Lähivõrdlusi / Lähivertailuja» (Estonia)  
 LRE = «London Review of Education» (United Kingdom)  
 LURA = «Latvijas Universitātes Raksti» (Lettland)  
 LURAPE = «Latvijas Universitātes Raksti. Pedagoģija un skolotāju izglītība» (Lettland)  
 LZAV = «Latvijas Zinātņu Akadēmijas Vēstis. A daļa. Sociālās un humanitārās zinātnes» (Lettland)  
 MAS = «Matematika v Shkole» (Russia)

- MDS = «Il mestiere di Storico» (Italy)
- MEDIAOB = «Mediaobrazovanie» (Russia)
- MEDS = «Modern Education Science» (China)
- MEKADO = «Menedzhement kachestva doshkol'nogo obrazovanya: istorya i sovremennost'» (Russia)
- MEME = «Modern Elementary and Middle School Education» (China)
- MEMSE = «Modern Elementary and Middle School Education» (China)
- MER = «Memoria e Ricerca» (Italy)
- MES = «Medicina e Storia» (Italy)
- MESU = «Mësuesi» (Albania)
- METEP = «Modern Education: Theory and Practice» (China)
- MFB = «Mitteilungsblatt des Förderkreises der Bibliothek für Bildungsgeschichtliche Forschung» (Germany)
- MGBO = «Mitteilungen der Gesellschaft für Buchforschung in Österreich» (Austria)
- MIROB = «Mir obrazovanya - Obrazovanie v mire» (Russia)
- MMP = «Matematika i Metodika ee Prepodavanya» (Russia)
- MNIM = «Mnimon» (Greece)
- MNS = «Medicina nei Secoli» (Italy)
- MOD = «Modern Education Science» (China)
- MODEC = «Modern Chinese Literature Research Series» (China)
- MOOM = «Mir Obrazovanya – Obrazovanie v Mire» (Russia)
- MOR = «Modern Reading» (China)
- MP = «Magyar Pedagógia» (Hungary)
- MSHE = «Methis. Studia humaniora Estonica» (Estonia)
- MT = «Magyar Tudomány» (Hungary)
- MTR = «Mokslo ir technikos raida» (Lettland)
- MVDS = «Muttersprache. Vierteljahresschrift für Deutsche Sprache» (Germany)
- NAC = «Nachalnoe Obrazovanie» (Russia)
- NACS = «Nachalnaya Shkola» (Russia)
- NAER = «Journal of New Approaches in Educational Research» (Spain)
- NAR = «Narodnoe Obrazovanie» (Russia)
- NAS = «Nauka i Shkola» (Russia)
- NASP = «Nachalnaya Shkola Plyus Do i Posle» (Russia)
- NASS = «Nanjing Social Science» (China)
- NAV = «Nastava i vaspitanje» (Serbia)
- N-AZfürR = «Nordost-Archiv: Zeitschrift für Regionalgeschichte» (Germany)
- NE = «Neveléstörténet» (Hungary)
- NEWPA = «New paideia» (Greece)
- NFDS = «Le nuove frontiere della scuola» (Italy)
- NINSS = «Ningxia Social Science» (China)
- NISO = «Nauchnye Issledovanya v Obrazovanii. Pedagogika. Psikhologiya. Ekonomika» (Russia)
- NJHS = «Nuncius. Journal of the History of Science» (Italy)

- NLOBO = «Novoe Literaturnoe obozrenie» (Russia)  
NOJEH = «Nordic Journal of Educational History» (Norway)  
NOLIT = «Northern Literature» (China)  
NOVPETE = «Novye pedagogicheskie tekhnologii» (Russia)  
NP = «Neos Pedagogos» (Greece)  
NPPI = «Novoe v Psikhologo-Pedagogicheskikh Issledovaniyakh» (Russia)  
NR = «Nauka i Religya» (Russia)  
NS = «Neskuchnyj Sad» (Russia)  
NSS = «Ningxia Social Science» (China)  
OBED = «Observation of Education» (China)  
OBRA = «Obrazovanie» (Bulgaria)  
OBRA = «Obrazovanie i nauka» (Russia)  
OBRA = «Obrazovanie v sovremennoj shkole» (Russia)  
OBRO = «Obrazovanie i Obshchestvo» (Russia)  
OBUCH = «Obuchenie» (Russia)  
ODOSHDE = «O doshkol'nom detstve» (Russia)  
ODP = «Obrazovanie XXI Veka» (Russia)  
ONDE = «O Novo despertar» (Portugal)  
ORE = «Oxford Review of Education» (United Kingdom)  
OSS = «Obrazovanie v Sovremennoj Shkole» (Russia)  
OTECH = «Obrazovanie i tekhnologii. Godishno nauchno-metodicheskoe spisanie» (Bulgaria)  
OTS = «Otkrytaya Shkola» (Russia)  
OUP = «Obrazovanie v uslovyakh Perekhodana Novye Standarty» (Russia)  
OZP = «Otechestvennaya i Zarubezhnaya Pedagogika» (Russia)  
PDG = «Pedagogika» (Lettland)  
PDV = «Prepodavatel XXI Vek» (Russia)  
PE = «People's Education» (China)  
PED = «Pedagogika» (Bulgaria)  
PEDASZE = «Pedagógia történeti szemle» (Hungary)  
PEDG = «Pedagogika» (Russia)  
PEDISK = «Pedagogika iskusstva» (Russia)  
PEDIZ = «Pedagogicheskie izmerenya» (Russia)  
PEDS = «Pedagogija (P)» (Serbia)  
PEDT = «Pedagoška stvarnost» (Serbia)  
PEED = «People's Education» (China)  
PENSE = «Pensar Enfermagem» (Portugal)  
PER = «Perspectiva. Revista do Centro de Ciências da Educação» (Brazil)  
PERS = «Preschool Education Research» (China)  
PERAS = «Per Aspera ad Astra» (Hungary)  
PH = «Paedagogica Historica» (Netherlands)  
PHHE = «Perspectives on the History of Higher Education» (USA)  
PNPR = «Pedagogicheskaya Nauka i Praktika – Regionu» (Russia)



- POBN = «Pedagogicheskoe Obrazovanie i Nauka» (Russia)  
PP = «Pro-Posições» (Brazil)  
PPP = «Psikhologo-Pedagogichesky Poisk» (Russia)  
PPR = «Pedagogika i Psikhologiya v Rossii: Vchera, Segodnya, Zavtra» (Russia)  
PR = «Pedagogical Review» (Greece)  
PRE = «Press» (China)  
PRER = «Preschool Education Research» (China)  
PRIMEF = «Primary Education Florina» (Greece)  
PRIS = «Prepodavanie Istorii v Shkole» (Russia)  
PRISO = «Prepodavanie Istoriii Obshestvoznanya v Shkole» (Russia)  
PRO = «Pravo i Obrazovanie» (Russia)  
PROBRA = «Professional'noe obrazovanie: teorya i praktika» (Russia)  
PROPO = «Problemy pedagogicheskogo obrazovanya: istorya i sovremennost'» (Russia)  
PROQ = «Prospects, Quarterly Review of Comparative Education» (Schwitzerland)  
PROS = «Profilnaya Shkola» (Russia)  
PSIKHOL = «Psikhologiya i shkola» (Russia)  
PSM = «Pedagogika v Sovremennom Mire» (Russia)  
PSO = «Problemy Sovremennogo Obrazovanya» (Russia)  
PST = «Portugese Studies» (England)  
PTE IGYK = «PTE-Igyk» (Hungary)  
PTP = «Pedagogy. Theory & Praxis» (Greece)  
PZB = «Pedagocheskyj Zhurnal Bashkortostana» (Russia)  
QB = «Quaderni della Brianza» (Italy)  
QFIAB = «Quellen und Forschungen aus Italienischen Archiven und Bibliotheken» (Germany)  
QS = «Quaderni Storici» (Italy)  
QSUP = «Quaderni per la Storia dell'Università di Padova» (Italy)  
RALO = «Revista de Administração Local» (Portugal)  
RBHE = «Revista Brasileira de História de Educação» (Brazil)  
RCE = «Revista de Ciencias de la Educación» (Spain)  
RDO = «Rozprawy z Dziejow Oswiaty» (Poland)  
RECOED = «Revista Contemporânea de Educação» (Brazil)  
RECOW = «Review of Contemporary Writers» (China)  
REDU = «REDU - Revista de Docencia Universitaria» (Spain)  
REDUQ = «Revista Educação em Questão» (Brazil)  
REE = «Revista de Educação» (Brazil)  
REED = «Research of Elementary Education» (China)  
RELUE = «Revista Lusófona de Educação» (Portugal)  
REMOCL = «Research of Modern Chinese Literature» (China)  
REOSET = «Research of Education and Teaching» (China)  
REPD = «Revista Profissão Docente» (Brazil)  
REPMA = «Research of Press Marketing» (China)  
RESCIMO = «Research of Chinese Modern Literature» (China)

- REVT = «Revista Transversos» (Brazil)  
 RFP = «Revue Française de Pédagogie» (France)  
 RH = «Revista HISTEDBR-On Line» (Brazil)  
 RHC = «Revista Historia Caribe» (Colombia)  
 RHE = «Revista História da Educação» (Brazil)  
 RHEC = «Revista Historia de la Educación Colombiana» (Colombia)  
 RHEI = «Revue d'Histoire de l'Enfance Irrégulière. Le Temps de l'Histoire» (France)  
 RHEL = «Revista Historia de la Educación Latinoamericana» (Colombia)  
 RHR = «Revista de História Regional y Local» (Colombia)  
 RI = «Revista Interações» (Brazil)  
 RMHE = «Revista Mexicana de Historia de la Educación» (Mexico)  
 RN = «Revue du Nord» (France)  
 RPED = «Revista Portuguesa de Educação» (Portugal)  
 RPH = «Revista Procesos Históricos» (Venezuela)  
 RPI = «Reading Primers International – Newsletter» (Germany)  
 RPM = «Research of Publishing and Marketing» (China)  
 RS = «Rousseau Studies» (Switzerland)  
 RSE = «Rivista di storia dell'educazione. Periodico del Centro Italiano per la Ricerca Storico-Educativa»; until 2013: NBC = «Nuovo Bollettino del Centro Italiano per la Ricerca Storico-Educativa» (Italy)  
 RSHKE = «Revista e Shkencave Shoqerore» (Albania)  
 RSI = «Rivista Storica Italiana» (Italy)  
 RSR = «Rassegna Storica del Risorgimento» (Italy)  
 RSUT = «Rivista di Storia dell'Università di Torino»; until 2012: QSUT = «Quaderni di Storia dell'Università di Torino» (Italy)  
 RTUZI = RTU zinātniskie raksti. Humanitārās un sociālās zinātnes» (Lettland)  
 RUSJA = «Russky yazyk v shkole» (Russia)  
 RUSREC = «Russkaya rech'» (Russia)  
 SA = «Studime Albanologjike» (Albania)  
 SAGHE = «Sarmiento. Anuario Galego de Historia da Educación» (Spain)  
 SARE = «Southern African Review of Education» (South Africa)  
 SCIRS = «Social Compass. International Review of Sociology of Religion» (United Kingdom)  
 SCI-TE = «Sci-Tech Info» (China)  
 SE = «Studium Educationis» (Italy)  
 SEH = «Social and Education History» (Spain)  
 SELSH = «Sel'skaya shkola» (Russia)  
 SFLT = «Shandong Foreign Language Teaching» (China)  
 SHB = «Shkol'naya Biblioteka» (Russia)  
 SIBUCH = «Sibirskij uchitel» (Russia)  
 SISP = «Sovremennye issledovanya social'nykh problem (elektronnyj nauchnyj zhurnal» (Russia)  
 SL = «Southern Literature» (China)

- SOB = «Sociologiya Obrazovanya» (Russia)  
SOBOD = «Sodobna pedagogika» (Serbia)  
SOCIASR «Social Science Research» (China)  
SOCIOBRA = «Sociologiya obrazovanya» (Russia)  
SONP = «Strategiina Obrazovatel'nata i Nauchnata Politika» (Bulgaria)  
SOTLI = «Southern Literature» (China)  
SOVRO = «Sovremennaya shkola Rossii. Voprosy modernizacii» (Russia)  
SP = «Sodobna Pedagogika. Journal of Contemporary Educational Studies» (Slovenia)  
SPR = «Social'naya Pedagogika v Rossii» (Russia)  
SR = «Slavica Revalensia» (Estonia)  
SREPRO = «Srednee professional'noe obrazovanie» (Russia)  
SS = «Studi Storici» (Italy)  
SSC = «Social Scientist» (China)  
SSR = «Social Science Research» (China)  
SSS = «Sign Systems Studies» (Estonia)  
SSS = Shandong Social Science» (China)  
STE = «Shkol'nye Tekhnologii» (Russia)  
STIP = «Stranicy Istorii Pedagogiki» (Russia)  
SUAN = «Sumadijski anali» (Lettland)  
TAC = «Theory of Art and Criticism» (China)  
TAG = «Tagad» (Hungary)  
TAM = «Teaching and Management» (China)  
TEAMA = «Teaching and Management» (China)  
TEOPRA = «Teorya i praktika obuchenya i vospitanya» (Russia)  
THEC = «Theory and Creation» (China)  
THEMAT = «Teemata Istorias tes» (Grece)  
TIAFOR = «The International Academic Forum. Journal of Education» (Japan)  
TID = «Tradiciya ir dabartis. Mokslo darbai» (Lettland)  
TILT = «Tiltai» (Lettland)  
TLJA = «Theodor-Litt-Jahrbuch» (Germany)  
TM = «Theory Monthly» (China)  
TORN = «Történelemtanítás» (Hungary)  
TRR = «The Russian Review» (Usa)  
TRUS = «Truth Seeking» (China)  
TT = «Teachers and Teaching» (United Kingdom)  
TÜAK = «Tartu Ülikooli Ajaloo Kõsimusi» (Estonia)  
TUDAS = «Tudásmenedzsment» (Hungary)  
TUN = «Tuna. Ajalookultuuri ajakiri» (Estonia)  
UCHIT = «Uchitel'» (Russia)  
UDD = «Uddannelseshistorie» (Danemark)  
UDOU = «Upravlenie Doshkol'nym Obrazovatel'nym Uchrezhdeniem» (Russia)  
UNICH = «Universitetskie Chtenya» (Russia)  
UPED = «Új pedagógiai szemle» (Hungary)

- UPEDAG = «Új pedagógiai szemle» (Hungary)  
UPRAOB = «Upravlenie i obrazovanie» (Bulgaria)  
UPRASO = «Upravlenie sovremennoj shkoly» (Russia)  
US-CHI = «US-China Education Review» (United States)  
UZKU = «Uchenye Zapiski Kazanskogo Universiteta. Serya Gumanitarnyj Nauki» (Russia)  
VDOU = «Vospitatel' Dosholnogo Obrazovatel'nogo Uchrezhdeniya» (Russia)  
VESAP = «Vestnik Sankt-Peterburgskogo universiteta kultury i iskusstva» (Russia)  
VESGE = «Vestnik Gercenovskogo universiteta» (Russia)  
VESTU = «Vestnik Universiteta Rossijskoj akademii obrazovanya» (Russia)  
VKTU = «Vestnik Kazanskogo tekhnologicheskogo universiteta» (Russia)  
VMGGU = «Vestnik Moskovskogo Gosudarstvennogo Gumanitarnogo Universiteta im. M.A. Sholokhova» (Russia)  
VMGPU = «Vestnik Moskovskogo Gorodskogo Pedagogicheskogo Universiteta. Serya Pedagogika i Psikhologiya» (Russia)  
VMUPO = «Vestnik Moskovskogo Universiteta. Pedagogicheskoe Obrazovanie» (Russia)  
VNES = «Vneshkol'nik» (Russia)  
VOB = «Voprosy Obrazovanya» (Russia)  
VOF = «Voprosy filosofii» (Russia)  
VOGPU = «Vestnik Orenburgskogo Gosudarstvennogo Pedagogicheskogo Universiteta» (Russia)  
VOR = «Vyshe Obrazovanie v Rossii» (Russia)  
VORS = «Vyshee obrazovanie segodnya» (Russia)  
VOSPIMLA = «Vospitanie i obuchenie detej mladshego vozrasta» (Russia)  
VOSRAS = «Vospitatel'naya rabota v shkole» (Russia)  
VOSS = «Vospitanie v Shkole» (Russia)  
VOSSHO = «Vospitanie shkolnikov» (Russia)  
VROGU = «Vestnik Rossyskogo gumanitarnogo nauchnogo fonda» (Russia)  
VSO = «Voprosy sovremennogo obrazovanya» (Russia)  
VVS = «Vestnik Vyshej Shkoly» (Russia)  
WC = «Writing and Criticism» (China)  
WCLF = «World Chinese Literature Forum» (China)  
WEDO = «World Education Outlook» (China)  
YD = «Yearbook. International Society for History Didactics» (Germany)  
YIL = «Yilin» (China)  
ZHP = «Zeitschrift für Heilpädagogik» (Germany)  
ZNS = «Zavuch Nachal'noj Shkoly» (Russia)  
ZP = «Zeitschrift für Pädagogik» (Germany)

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